

NO: R221

COUNCIL DATE: October 23, 2017

REGULAR COUNCIL

TO: **Mayor & Council** DATE: **October 19, 2017**

FROM: **General Manager, Planning & Development** FILE: **3900-20-18020**
6440-20 (2016)

SUBJECT: **City of Surrey Official Community Plan 2016 Performance Review**

RECOMMENDATION

The Planning & Development Department recommends that Council:

1. Receive this report as information.

PURPOSE

Surrey Official Community Plan By-law, No. 12900 ("OCP By-law") specifies that an annual review of the Official Community Plan (OCP) is to be undertaken to update relevant information and to evaluate and report to Council on the status of the OCP's implementation. This report is intended to fulfill that requirement for 2016.

BACKGROUND

Surrey's OCP is a comprehensive plan guiding the future evolution of the City. An OCP update was completed in 2013, and was adopted by Council in 2014. The updated OCP is organized under a new set of themes and includes a broader set of key indicators than the previous OCP. The themes are as follows:

- Theme A: Growth Management
- Theme B: Centres, Corridors and Neighbourhoods
- Theme C: Infrastructure and Facilities
- Theme D: Ecosystems
- Theme E: Economy
- Theme F: Society and Culture

The OCP indicates annual reporting will take place to monitor the effectiveness of the document's policies and to measure consistency with regional goals and policies established through the Regional Growth Strategy. With the updated OCP, the annual reporting will be provided using a new format, the OCP Performance Review Report (Appendix "I"), which aligns with the six OCP themes.

The Planning & Development Department uses several sources to obtain the information provided within the performance review, including:

- Internal data compiled by the Community Planning Division with information from Building Division, Transportation Division, Parks Recreation & Culture Department, and Sustainability Office;
- Surrey School District;
- Metro Vancouver;
- British Columbia Assessment Authority;
- Ministry of Health; and
- Census Canada.

DISCUSSION

The OCP Performance Review provides measures and indicators focusing on the six OCP themes. In addition to data on land use, population, housing stock and employment changes, the report provides data for regional growth targets, urban amenities, greenways and bike lanes, parkland density, Green Infrastructure Network ownership, protected heritage, urban agriculture and vacancy rates. The following provides highlights of the OCP Performance Review Report under each of the OCP themes.

Theme A: Growth Management

A primary purpose of the annual OCP Performance Review is to assess the capacity available within the City to accommodate residential development in order to ensure orderly, long-range planning for growth. The following section highlights population, housing stock, dwelling unit demand, and growth within the Urban Containment Boundary described in the Performance Review.

Population

Surrey's total population, as of December 2016, is estimated at 525,220 residents. Over the past five years (2011 to 2016), Surrey's population grew by 41,510 residents representing an average annual growth rate of 1.72%.

A further population growth of approximately 49,730 residents is projected for the five years between 2016 and 2021 for an estimated population of 574,950 people. This estimate represents an average growth rate of approximately 1.9% over the next five years.

This expected growth is consistent with Metro Vancouver's Regional Growth Strategy estimates for Surrey's growth rate, and is slightly lower than the growth rate experienced in Surrey over the past decade. This level of growth is considered to be robust but manageable.

Detailed population information is on page 13 of the OCP Performance Review (Appendix "I").

Housing Stock

4,301 new dwelling units were constructed in 2016, including 1,609 (37%) one- and two-family houses (including secondary suites), 1,627 (38%) townhouses and row houses, and 1,065 (25%)

apartments. With 616 single family units demolished in 2016, the net total increase of new dwelling units for 2016 is 3,685.

At the end of 2016 there were an estimated 187,893 total dwelling units in Surrey, including secondary suites. Of this total, 117,189 (62.4%) were one- or two-family units in detached homes (with or without suites), 35,444 (18.9%) were townhouse and row house units, and 35,260 (18.8%) were apartments.

Over the last six years, approximately 17,459 new dwelling units (including secondary suites and coach houses) have been constructed in Surrey; an average of 3,461 per year. This number is net of the 2,969 units that were demolished during that time; total new construction averaged 3,956 per year over the last five years.

Detailed housing stock information is on page 14 of the OCP Performance Review (Appendix “I”).

Housing Starts

While the majority of existing residential units in the City are single-family dwellings, the percentage of multi-family units has increased from 34% to 37.6% over the past five years. By 2021, approximately 40.9% of Surrey’s housing stock is expected to consist of multi-family dwelling units.

Housing starts decreased slightly in 2016 compared to 2015. Specifically, it is expected that the multi-family housing market will continue to gain momentum in Surrey. For example, in 2016, approximately 73.1% of housing starts in Surrey were multi-family.

With an expectation that townhouses and apartments will dominate the yearly number of housing starts, the five year average of multi-family starts is projected to be 70-75% of total new units, due to increasing regional housing affordability challenges and the shrinking of the average household size in terms of number of occupants.

Detailed housing starts information is on page 15 of the OCP Performance Review (Appendix “I”).

Dwelling Unit Demand

Housing demand varies by housing type and location according to the needs and incomes of households. Some households prefer detached housing in suburban locations while others seek townhouses or apartments in more central locations. The relative availability of these different housing types in attractive locations, at prices that are affordable, determines the housing market.

Over the last 10 years, the proportion of single family and two-family houses has decreased; a trend which is likely to increase over time as new neighbourhoods are built out and a higher percentage of multi-family units is constructed in City Centre, Town Centres, and other infill locations.

City staff monitor development trends to assist in balancing market demand with housing supply. The objective is to maintain a minimum of a three-to-five year supply of residential development capacity, and housing type, in various areas of the City. It is estimated a net total of

approximately 19,441 units will be built in Surrey over the next five years, equating to an average of 3,888 units added annually.

Detailed dwelling unit demand information is on page 16 of the OCP Performance Review (Appendix "I").

Urban Containment Boundary

Development supported within the OCP is directed to take place within the Metro Vancouver Urban Containment Boundary (UCB). The UCB establishes a long term area for urban development and transportation and infrastructure investment and reinforces the protection of agricultural, conservation and rural areas.

Since 2010, the vast majority of new dwelling units (approximately 99.9%) were constructed within the UCB. In 2016, 99.6% of all new dwelling units (approximately 3,685 units) were constructed within Surrey's UCB, which is consistent with growth management policies in the OCP.

Theme B: Centres, Corridors and Neighbourhoods

A key objective of the OCP is to direct high density residential and commercial growth to the City Centre, Town Centres, and Frequent Transit Corridors, and to ensure the efficient and integrated development of new neighbourhoods. In addition, it encourages sensitive infill development in appropriate locations.

City Centre and Urban Centres

The OCP supports the redevelopment of urban areas intended to support higher densities. These areas fall within three categories:

1. Town Centres/Central Business District;
2. Urban Centres; and
3. Frequent Transit Development Areas (FTDAs).

As of December 2016, approximately 25,830 units in Surrey's City Centre and Urban Centres have either been constructed, issued a Building Permit, or received a Development Permit. An additional 5,958 dwelling units are currently in the development review process.

These areas collectively provide a total "build-out" capacity of 61,491 residential dwelling units, accommodating approximately 124,222 residents. Currently 41% of this capacity is constructed or approved with a further 10% under application.

Detailed community build-out information begins on page 26 of the OCP Performance Review (Appendix "I").

Frequent Transit Development Areas

The OCP identifies three types of transit-oriented development areas:

1. Frequent Transit Development Areas (FTDAs);
2. Frequent Transit Corridors; and
3. Rapid Transit Station Areas.

For the purposes of this report, only FTDAs are measured and reviewed for their contributions to Surrey's growth.

Surrey has three existing FTDAs: 104 Avenue, East Clayton, and Fleetwood. Based on current development policies, the 104 Avenue Corridor and East Clayton show the most increases in total units, with East Clayton expected to accommodate an additional 125 units and 104 Avenue another 90 additional units by 2021. It is important to note, however, that the 104 Avenue Corridor projections are likely to increase beyond the current projection, as this area is undergoing a land use review. It is anticipated that Fleetwood FTDA will remain largely unchanged over the next five years.

Secondary Plans

An analysis of the residential development capacity within each of the City's approved Secondary Plans (excluding City Centre and Town Centre Plans) shows a total capacity of 84,053 dwelling units. As of December 2016, approximately 45,700 dwelling units (54.4%), of the total capacity in approved Secondary Plan areas have either been constructed, issued a Building Permit, or received Development Permit approval. About 8,332 dwelling units (9.9%) are proceeding through the development review process.

At the end of 2016, the remaining capacity of approved Secondary Plans is estimated at 30,021 dwelling units, representing a supply sufficient to meet five years of demand for new housing.

Detailed secondary plan area capacity information is on page 37 of the OCP Performance Review (Appendix "I").

New Town Centre and Secondary Plans

New Town Centre and Secondary Plans anticipated to be completed in 2018 include the Guildford-104 Avenue Corridor Plan, Grandview Heights 3 Neighbourhood Concept Plan, Crescent Beach Plan, and South Campbell Heights Local Area Plan.

Infill Development

Infill residential development is defined as new, additional residential units constructed in established urban neighbourhoods that are not part of an NCP area, the City Centre Plan Area, or any Town Centre Plan Area. Some of these units include "one-for-one" replacement of existing single family homes, but most represent additional units achieved through development in vacant lots or through redevelopment that results in densification.

In 2016, there was a net of 700 housing starts in infill areas. Of these units, 470 were one- and two-family dwellings, and 230 were townhouse units with no apartment units. Based on current trends, it is expected that an average of approximately 840 new dwelling units per year, over the next five years, will be developed in infill areas around the City.

Theme C: Infrastructure and Facilities

Pedestrian and Cycling Infrastructure

The OCP supports providing a comprehensive transportation network that offers reliable, convenient and sustainable transportation choices. This is partly realized by providing pedestrian and cycling infrastructure that is safe, accessible and abundant. Over and above sidewalks, Surrey strives to provide greenways, paths, trails and bike lanes for recreational purposes and as support for alternative transportation modes other than the vehicle. In 2016, there were approximately 13 km of greenways, on-street bike lanes and park paths and trails added to the infrastructure system.

Detailed infrastructure information is on page 47 of the OCP Performance Review (Appendix “I”).

Parks

Surrey maintains over 2,700 hectares (6,670 acres) of public parkland and has several significant regional parks maintained by Metro Vancouver. Surrey’s Parks, Recreation and Culture Strategic Plan identifies different categories of parks and their intended role for serving Surrey’s recreational, cultural and environmental protection needs. These different park types are identified as:

- City Parks;
- Community Parks;
- Neighbourhoods Parks; and
- Nature Preserve.

Park type totals have adjusted over the past five years due to reclassifications; however, Surrey continues to add parkland overall, reaching over 2,700 hectares by 2016.

Detailed parks information is on page 48 of the OCP Performance Review (Appendix “I”).

Parkland Density

The OCP supports the continued provision of varied types of parkland for Surrey residents. In looking at park types, the City uses the following general ratios per 1,000 residents:

- City Parks—1.2 ha
- Community Parks—1.0 ha
- Neighbourhood Parks—1.2 ha
- Nature Preserve—0.8 ha

The City strives for an overall parkland to resident ratio of 4.2 hectares of parkland per 1,000 residents. In 2016, Surrey exceeded this goal, with a ratio of 5.2 hectares of parkland per 1,000 residents.

Theme D: Ecosystems

Biodiversity Conservation

As an important step toward ecosystem protection and enhancement, Council endorsed the Biodiversity Conservation Strategy (BCS) in order to prioritize options and establish management criteria for a Green Infrastructure Network (GIN). Surrey's GIN comprises a natural interconnected network of hubs, sites and corridors that conserves natural ecosystem values and functions.

A key component of the BCS is to work to reach the ultimate level of protection for these sensitive biodiverse areas by securing lands under public ownership. Approximately 60%, (2,420 hectares) of the GIN is currently publically owned.

To support the management, protection and enhancement of Surrey's natural ecosystems, the City is tracking the amount of GIN that is being added to public ownership. In 2016, there was approximately 1,230 hectares of the GIN that was held in private ownership. Since 2013, when the GIN was originally created, approximately 19.28 hectares were added to either a City or Regional park system.

Detailed biodiversity information is on page 53 of the OCP Performance Review (Appendix "I").

Theme E: Economy

Employment

As of December 2016 total employment in Surrey was estimated at 181,520 jobs. The majority of employment in Surrey was commercial, at 49.3%, including retail, office and service-sector jobs. Institutional jobs comprised approximately 17.2% of total Surrey employment, with industrial jobs accounting for 33.4%.

Approximately 3,638 new jobs were added to Surrey's economy in 2016: 54.3% commercial employment (1,976 new jobs), 40.7% industrial employment (1,479 new jobs) and 5% institutional employment (183 new jobs).

It is expected that Surrey's employment rates will continue to grow at a pace that exceeds population growth as continued planning initiatives provide additional lands and attractive locations for business development. The average annual job growth rate between 2011 and 2016 was 2.24%.

A trend toward an increasing percentage of commercial and institutional jobs is expected to continue to increase into the foreseeable future in response to growth of Surrey's City Centre and other business districts. Institutional employment will gain momentum over time, as new projects related to government services, education, and health care facilities are planned in response to the needs of Surrey's growing population.

Detailed employment information is on page 65 of the OCP Performance Review (Appendix "I").

Theme F: Society and Culture

Schools

The Surrey School District is the largest in British Columbia, with 101 elementary schools, 19 secondary schools, five district learning centres, one blended school, and three adult education centres. Total current enrollment is approximately 70,265 students.

Although there were no new schools completed in 2016, several are under construction, and the School District plans to complete upgrades or new construction of seven schools by 2020. Following are the details of each school, listed by projected year of completion:

To be completed for 2018

- Ecole Salish Secondary (under construction) - 1,500 new seats
- Woodward Hill Elementary (under construction) - 200 additional seats

To be completed for 2019

- Sullivan Elementary (at design stage) - 200 additional seats
- Panorama Park Elementary (at design stage) - 200 additional seats
- Clayton North Elementary School (at design stage) - 655 new seats

To be completed for 2020

- Grandview Area Secondary (at design stage) - 1,500 new seats
- Clayton Village NW Elementary (at design stage) - 655 new seats

Vacancy Rates

According to the CMHC Vancouver Market Report in 2016, the rental market remains very tight in the Lower Mainland, with vacancy rates for purpose-built apartments declining to 0.7% from 0.8% last year. Persistently low vacancy rates can be attributed to rising demand for rental units. In Surrey, the vacancy rate for apartments has dropped significantly from the last two years, reaching 0.4% in 2016.

Detailed vacancy rate information is on page 75 of the OCP Performance Review (Appendix "I").

Liveability

An urban amenities indicator can be used to help determine the health and diversity of urban environments by measuring the number of homes that are within 400m, or approximately a five minute walk, to amenities. This is an important indicator as it illustrates the liveability of an urban environment and provides an understanding of how residents are able to engage and live within their neighbourhoods or communities without having to seek access to amenities, recreation services, health care or shopping elsewhere.

The urban amenities indicator measured the number of homes within walking distance (400 metres) from the following amenities:

- Parks;
- Frequent Transit;

- Bike routes;
- Schools; and
- Grocery stores

All amenity indicators remained the same from 2015 to 2016, with the exception of grocery stores, which dropped slightly. Access to bike routes is the best performing amenity indicator for Surrey at 92%, with access to parks the second best performing indicator at 76%.

Detailed liveability information is on page 76 of the OCP Performance Review (Appendix “I”).

CONCLUSION

The OCP Annual Performance Review for 2016 has been prepared to help monitor and record progress in implementing the City’s Official Community Plan, and to determine the consistency between Surrey’s evolution and Metro Vancouver’s Regional Growth Strategy. It includes a broader set of indicators than the previous OCP. These indicators will be monitored and reported annually in order to measure success in meeting key planning objectives.

Based on the information above, it is recommended that Council:

- Receive this report as information.

Original signed by
Jean Lamontagne
General Manager, Planning & Development

PH/CS/SJ/ss

Appendix “I” – City of Surrey Official Community Plan 2016 Performance Review

2016 PERFORMANCE REVIEW

CITY OF SURREY
Official Community Plan



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INTRODUCTION

The City of Surrey, through its Official Community Plan, supports the vision of Metro Vancouver's Regional Growth Strategy for a sustainable region and aligns its own future vision in support of this goal. This includes:

- * Developing Surrey City Centre as the Region's second Metropolitan Centre
- * Focusing additional growth capacity to Town Centres and transit corridors
- * Maintaining the Urban Containment Boundary and the Agricultural and Conservation/Recreation land use designations
- * Planning urban land uses to reduce dependence on the private automobile
- * Committing to the development and protection of employment areas that underpin the regional economy.

In support of this vision, policies within Surrey's OCP are divided into six themes:

- a) Growth Management
- b) Centres, Corridors and Neighbourhoods
- c) Infrastructure and Facilities
- d) Ecosystems
- e) Economy
- f) Society and Culture

These Themes are the focus of the OCP Performance Report and are used as a tool to determine the effectiveness of the policies within the OCP as well as to identify where gaps exist, and therefore, where efforts are required in order to continue to strive toward a Surrey that is growing, healthy and accommodating to its residents and businesses.

Information provided within this Performance Report is collected with the intent of providing the most accurate and up-to-date numbers as possible. Where data has been collected in a specific manner, notations will be provided for further clarification.

VISION SURREY | 2041

Surrey's Official Community Plan (OCP) is a comprehensive document guiding the planning and development of the city. The OCP includes a wide range of policy directions as well as maps, sketches and illustrations indicating how land use, growth and development will be managed and directed. These policies are consistent with the Vision established in the OCP stating that "The City of Surrey will continually become a greener, more complete, more compact and connected community that is resilient, safer, inclusive, healthier and more beautiful." Each of these "Building Blocks" helps ensure consistency with the future direction established at the regional level for how Surrey will evolve and grow over time.



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THEME A: GROWTH MANAGEMENT

THEME A SUMMARY

The City of Surrey has experienced significant and steady growth in both population and employment over the past several decades. It is expected that this level of growth will continue through the 30-year planning horizon of this Official Community Plan fueled by strong regional in-migration and by the attractiveness and relative availability and affordability of land for urban development.

Current population projections for Surrey indicate the population growing to 770,200 by the year 2046. This represents an increase of approximately 296,600 people over the next 30 years. Employment is expected to reach 296,600 jobs by the year 2041, an increase of approximately 125,400 over total jobs available today. Managing and directing this expected growth in the most sustainable manner possible is a key goal of this Official Community Plan.

The objectives in Theme A that guide the City's growth management policies include directing high-density residential and commercial growth to the City Centre, Town Centres and Frequent Transit Corridors, ensuring the efficient and integrated development of new neighbourhoods and encouraging sensitive infill development in appropriate locations.



Population

Surrey’s total population, as of December 2016, is estimated at 525,220 residents. This estimate is based on the City’s residential building inventory, created using a combination of data sources including:

- * BC Assessment Authority
- * Surrey Building Permits
- * Surrey Secondary Suite estimates
- * Current GIS Orthophoto imagery
- * Surrey GIS Cadastral (lots and addresses) data.

The City’s estimates are calibrated to the Census Canada data, including an estimated undercount, every five years as the Census data is made available.

Surrey’s total existing and projected population for 2011 through 2021 is illustrated in **Figure 1**. Over the past five years, Surrey’s population grew by 41,510 residents representing an average annual growth rate of 1.72% (**Figure 2**).

A further population growth of approximately 49,730 residents is projected for the five years between 2017 and 2021 for an estimated population of 574,950 people. This estimate represents an average growth rate of approximately 1.89% over the next five years.

This expected growth rate is consistent with Metro Vancouver’s Regional Growth Strategy estimates for Surrey and is slightly lower than the growth rate experienced in Surrey over the past decade. This level of growth is considered to be robust but manageable.

At the end of 2016, Surrey’s population comprised approximately 20.2% of the population of Metro Vancouver. Over the next five years, this is expected to rise to 20.8% edging closer to the projected regional share of 29.2% for Surrey.

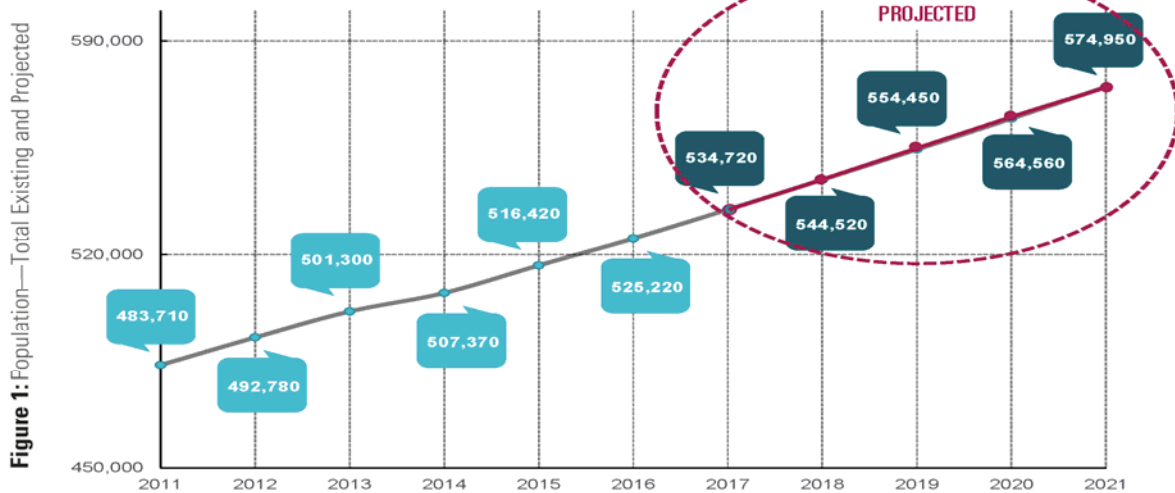
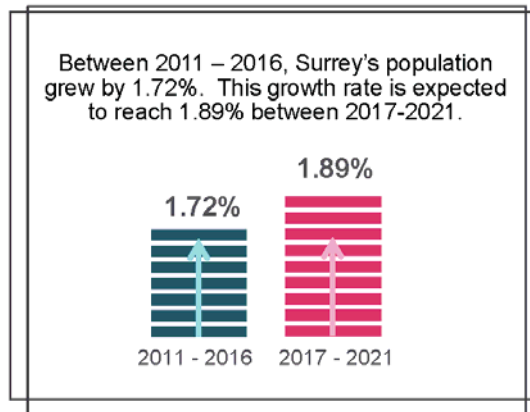


Figure 1: Population—Total Existing and Projected

Figure 2: Growth Rate—Average Annual



Housing Stock

In 2016, 4,301 new dwelling units were constructed including 1,609 (37%) one and two-family homes (including secondary suites), 1,627 (38%) townhouses and 1,065 (25%) apartments (**Figure 3**). With 616 single family units demolished in 2016, the net total increase of new dwelling units for 2016 is 3,685.

At the end of 2016, there were an estimated 187,893 dwelling units in Surrey, including secondary suites. Of this total, 117,189 (62%) were one- or two-family units in detached homes (with or without suites), 35,444 (19%) were townhouse units and 35,260 (19%) were apartment units (**Figure 3**).

Figure 3: Dwelling Units—New

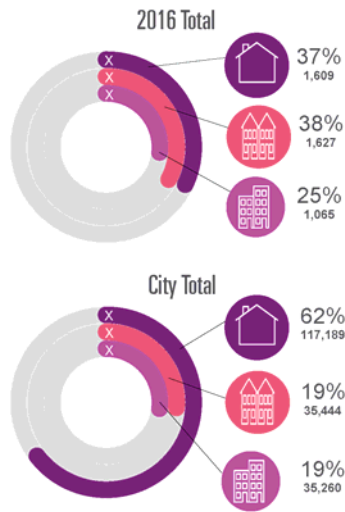
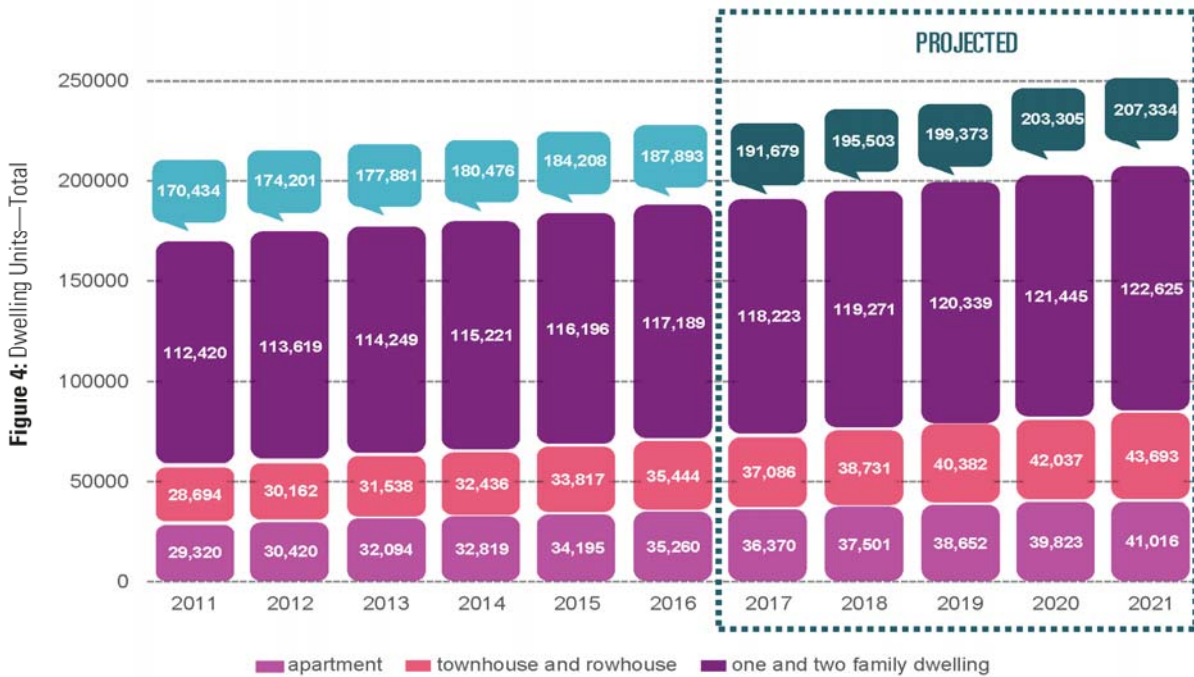


Figure 4 shows the estimated number of dwelling units in Surrey by dwelling type, both existing and projected, for the years 2011 through 2021. Over the last six years, approximately 17,459 net additional dwelling units (including secondary suites and coach houses) were added in Surrey, an average of 3,461 per year. This number does not take into consideration the 2,969 units that were demolished during that time, which, if included in the total, would average additional dwelling units to 3,956 per year over the last five years.



Housing Starts

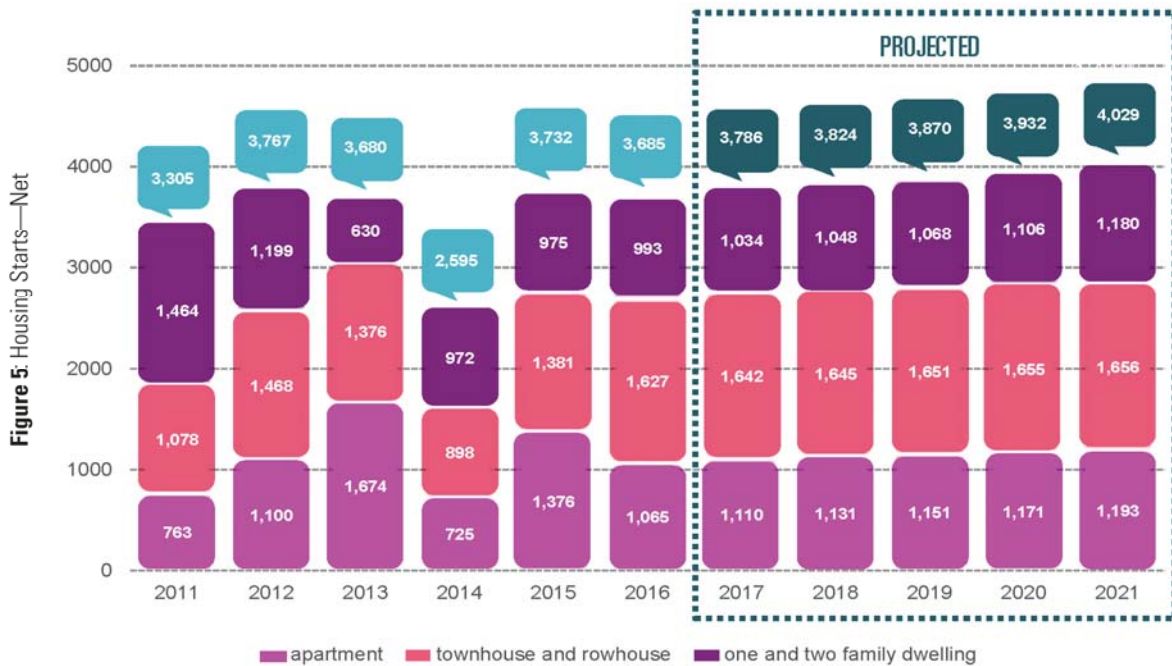
While the majority of existing residential units in the City are single-family dwellings, the percentage of multi-family units has increased from 34% to 37.6% over the past five years. By 2021, approximately 40.9% of Surrey’s housing stock is expected to consist of multi-family dwelling units.

As shown in **Figure 5**, housing starts increased in 2016 compared to 2015 and it is expected that the multi-family housing market will continue to gain momentum in Surrey. For example, in 2016, approximately 73.1% of housing starts in Surrey were multi-family.

With an expectation that townhouses and apartments will dominate the yearly number of housing starts, the five year average of multi-family starts is projected to be 70-75% of total new units, particularly in response to increasing regional housing affordability challenges and the shrinking of the average household size in terms of number of occupants.

Based on Surrey’s current population and housing stock, the overall average persons per dwelling unit (ppu) is approximately 2.8, a decrease from 3.0 ppu over the past decade. The average household size however, varies considerably within different areas of Surrey ranging from an average of 3.0 ppu in Newton to 2.5 ppu in South Surrey.

Over the next five years, average household size is expected to continue to trend downward as the population ages and as family size in Canada’s urban areas declines.



Dwelling Unit Demand

Over the last 10 years, the proportion of single-family and two-family houses has decreased; a trend which is likely to increase over time as new neighbourhoods are built out and a higher percentage of multi-family units is constructed in City Centre, Town Centres and other infill locations.

Projecting over the next five years, it is estimated a net total of approximately 19,441 units will be built in Surrey, equating to an average of 3,888 units added annually (**Figure 6**).

This approximate average addition to Surrey's housing stock will therefore result in approximately 207,334 total dwelling units (**Figure 7**) for all of Surrey by the year 2021.



Dwelling Unit Demand

A primary purpose of the annual OCP Performance Review is to assess the capacity available within the City to accommodate residential development in order to ensure orderly, long-range planned growth.

The OCP’s residential growth strategy supports land supply and housing demand in the following categories:

- * **High density development** - in Town Centre and City Centre locations well-served by public transit
- * **New community development** - in approved Neighbourhood Concept Plan areas
- * **Infill development** - on vacant sites and the redevelopment of aging housing stock in established urban neighbourhoods.

City staff monitor development trends to assist in balancing market demand with housing supply. The objective is to maintain a minimum of a three-to-five year supply of residential development capacity and housing type, in various areas of the City.

Housing demand varies by housing type and location according to the needs and incomes of households. Some households prefer detached housing in suburban locations while others seek townhouses or apartments in more central locations. The relative availability of these different housing types in attractive locations and at prices that are affordable, determines the housing market.

Spread out between the three main categories of development, it is estimated that housing demand in Surrey will be approximately 3,888 dwelling units per year over the next five years, illustrated in **Figure 8**.

In terms of housing types, **Figure 9** illustrates the estimated average annual demand for each type (one and two family residential, townhouse and row-house and apartment) over the next five years.

Figure 8: Dwelling Unit Demand—By Location

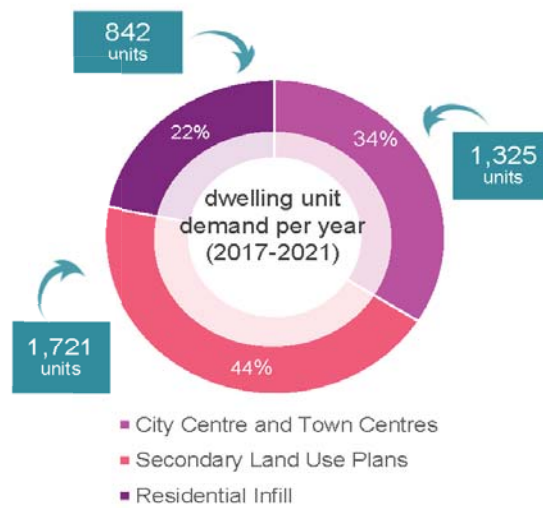
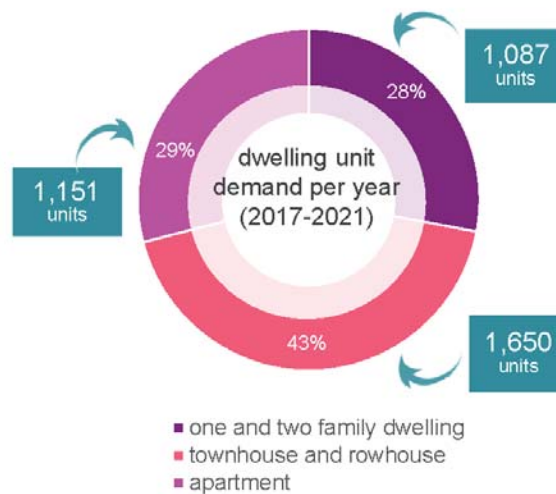


Figure 9: Dwelling Unit Demand—By Type



Regional Projections: Population and Employment

Surrey's growth is on track with the projections identified in Metro Vancouver's 2011 Regional Growth Strategy (RGS), including projections for population and employment.

Current estimates from Surrey's population and employment model reveal the RGS uses a smaller than average house size thereby creating slight differences between Surrey's and Metro Vancouver's estimates.

The RGS population model does recognize small house sizes closer to the year 2046 which accounts for the long-term consistency between both models (Figure 10). The RGS's models for current and projected employment figures are also consistent with Surrey's employment estimates (Figure 11).

Surrey's current and projected dwelling unit count is consistently slightly higher (4% - 8%) than the Regional Growth Strategy (Figure 12) which is also reflected in the previous population projection comparisons.

Figure 10: Surrey/Regional Estimate Comparisons—Population

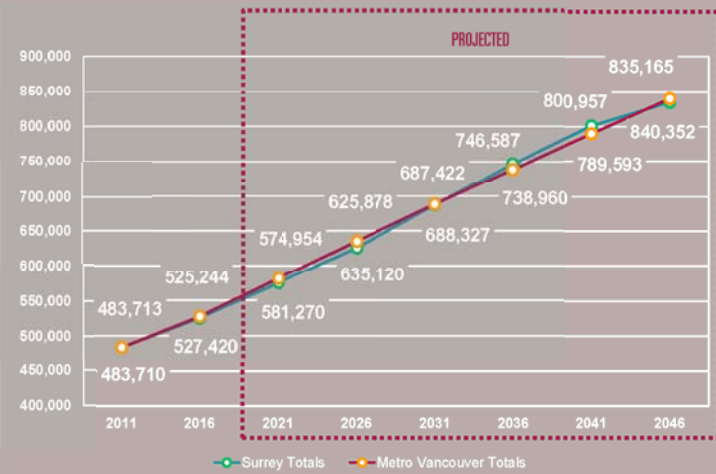


Figure 11: Surrey/Regional Estimate Comparisons—Employment

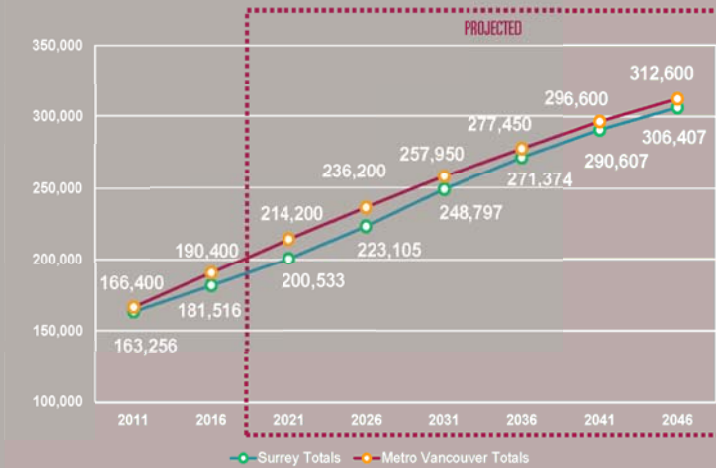
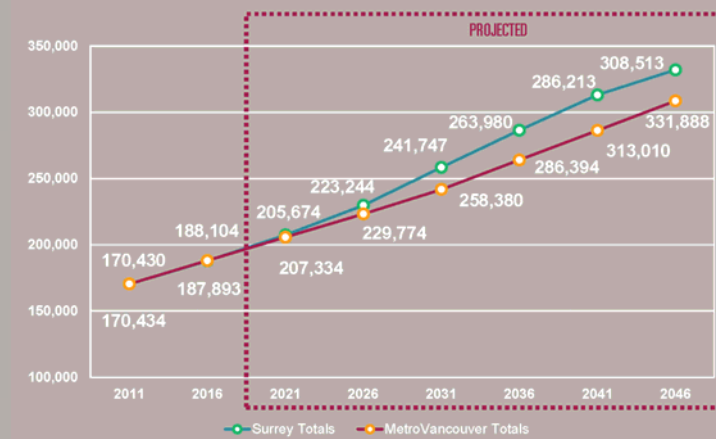


Figure 12: Surrey/Regional Dwelling Estimate Comparisons—Dwelling Unit Total



Urban Containment Boundary

Surrey's Official Community Plan supports planned, compact urban development as a means to accommodating Surrey's projected residential and employment growth.

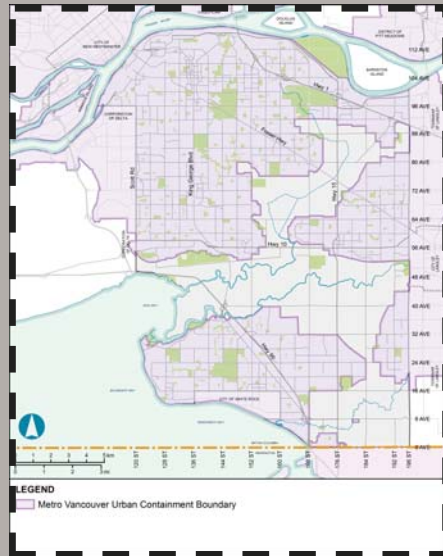
Supporting urban development within Surrey's Urban Containment Boundary helps to efficiently use existing infrastructure, reduces urban sprawl, reduces pressure on agricultural lands to accommodate residential and employment development, and reduces energy consumption and greenhouse gas emissions.

Surrey's entire municipal area comprises 324 sq. km, with approximately 66% or 214 sq. km identified as the Urban Containment Boundary (Figure 13). Development supported within the OCP is directed to take place within this Boundary.

Surrey's population growth is estimated to increase 2% per year between 2017-2021. An indicator of Surrey's growth, density and urban intensification is the number of persons per square kilometre within the Urban Containment Boundary.

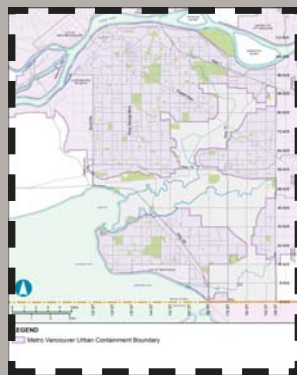
For 2016, Surrey's density reached 2,433 persons per square kilometre (Figure 14), which is expected to increase in proportion with Surrey's overall population increase. From the previous five years, this is an average increase of 193 persons per sq. km per year.

Figure 13: Urban Containment Boundary—Total Area



Surrey's Urban Containment Boundary equals 214 sq. km

Figure 14: Urban Containment Boundary—Persons Per Square Kilometre



X



=

2,433
persons
per
sq. km

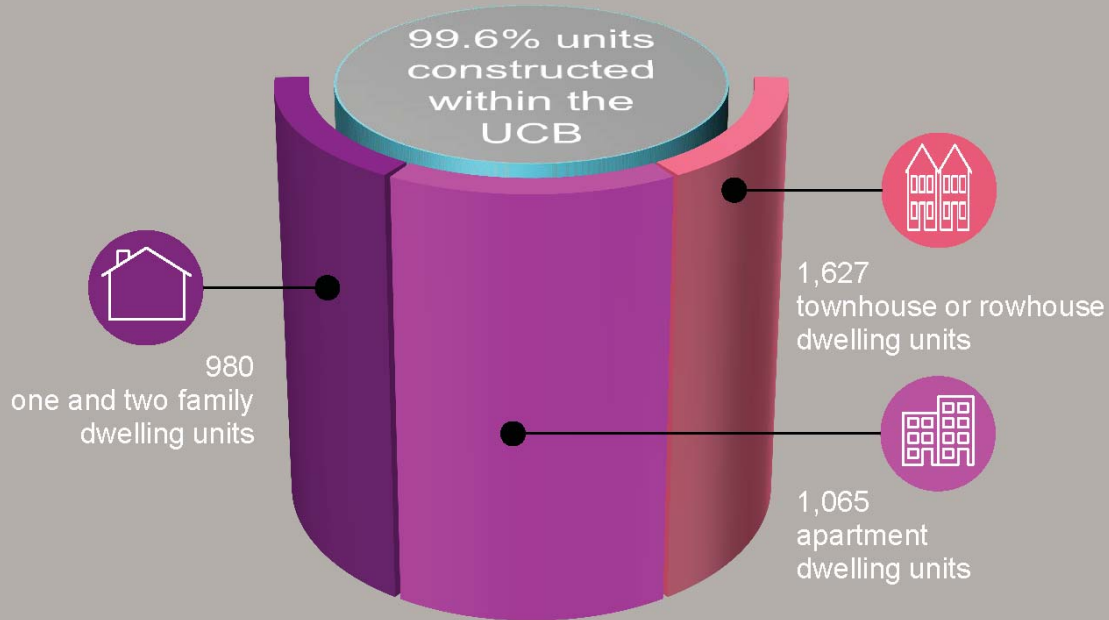
Urban Containment: Housing Starts

Since 2010, the vast majority of new dwelling units (approximately 99.88%) were constructed within Surrey’s Urban Containment Boundary.

In 2016, 99.6% of all new dwelling units (approximately 3,685 units) (**Figure 15**) were constructed within Surrey’s UCB, which is consistent with the growth management policies of the Official Community Plan.

Of those new housing starts, 73.3% or 2,692 units (townhouse and rowhouse and apartment totals combined) were comprised of multiple family units.

Figure 15: Urban Containment Boundary—Housing Starts (2016)



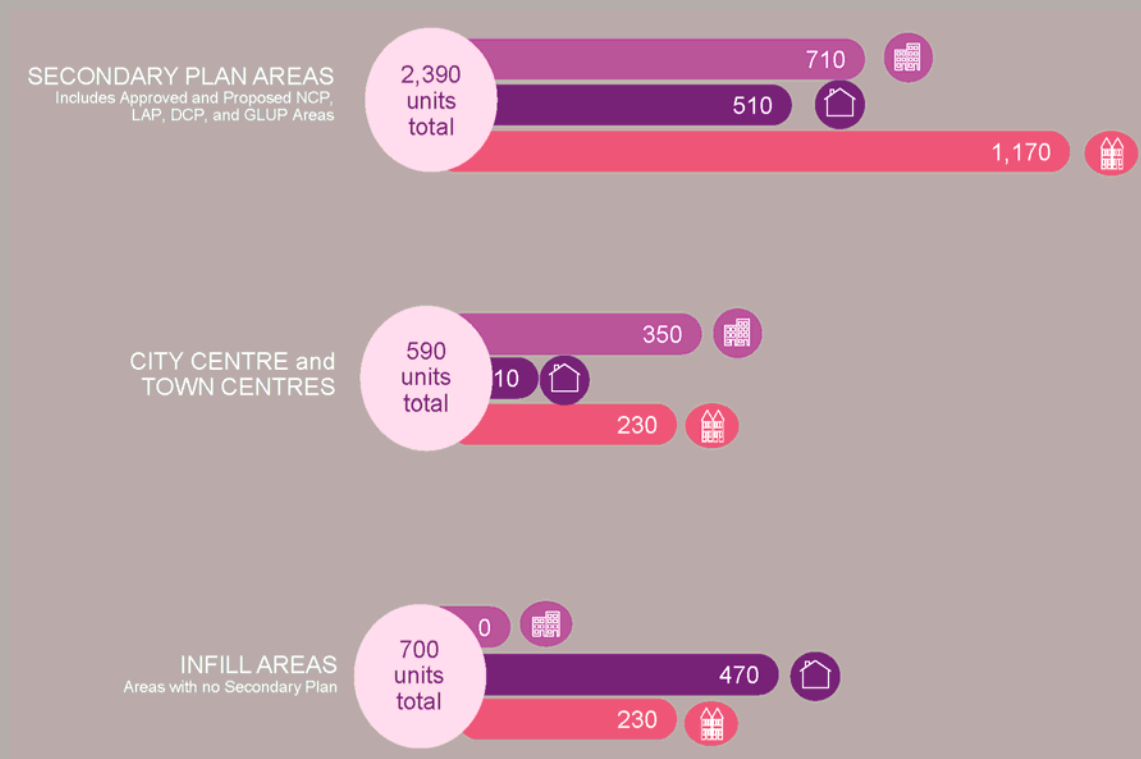
City Wide: 2016 Housing Starts

Continued regional growth, combined with a relatively large supply of developable land compared to other parts of the Lower Mainland, indicates that Surrey will continue to be a primary supplier of housing in the region, particularly of “ground-oriented” units such as townhouses, detached houses and secondary suites.

In 2016, approximately 29.2% of the growth in dwelling units in Metro Vancouver occurred in Surrey.

Most of that growth was comprised of multiple family construction, concentrated in existing Secondary Plan Areas (1,170 townhouse units constructed) and City Centre and Town Centre Areas (350 apartment units constructed) (**Figure 16**).

Figure 16: Housing Starts by Area (2016)







THEME B: CENTRES, CORRIDORS AND NEIGHBOURHOODS



Centres and Corridors

The first goal of Metro Vancouver’s Regional Growth Strategy is to create a compact urban area for the region as a whole. This is achieved by reducing sprawl, expanding infrastructure smartly and cost-effectively, creating urban areas well serviced by multi-modes of transportation, and by focusing development to a higher density that optimizes a constrained urban land base.

Surrey supports this future direction through the Official Community Plan and by supporting the redevelopment of urban areas intended to accommodate higher densities. These areas fall within three categories: Town Centre/Central Business District Land Use Designations (**Figure 17**), Urban Centres (**Figure 18**) and Frequent Transit Development Areas (FTDAs) (**Figure 18**).

Town Centres/Central Business District—based on the land use designations in the OCP, Town Centres and the Central Business District serve the commercial, recreational, cultural and social needs of local residents and have sufficient residential density to support urban services.

Urban Centres—based on Metro Vancouver’s Regional Growth Strategy (RGS), Urban Centres are identified as areas anticipated to accommodate a large portion of Surrey’s new dwelling unit and employment increases.

FTDAs—based on the RGS, FTDAs were required to be identified by Surrey at key locations along planned rapid transit corridors. These are areas outside of Town/Urban Centres where higher density development may be encouraged in association with improved transit service. Some of these areas may also include portions of established neighbourhoods where infill may be appropriate.

Figure 17: Town Centre Land Use Designations

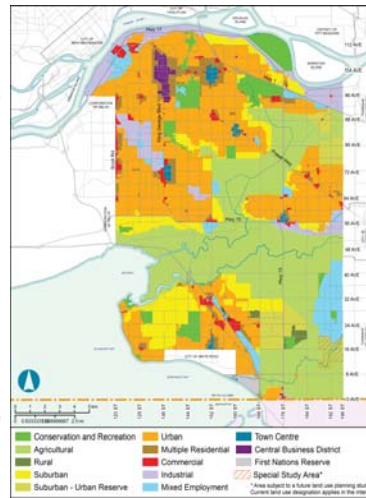
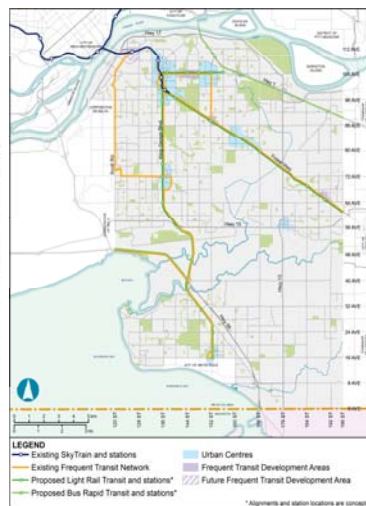


Figure 18: Urban Centres and FTDAs



In previous OCP annual reports, growth reporting focused on those urban areas included within a secondary plan area boundary; for example, within Neighbourhood Concept Plan Areas and General Land Use Plan Areas.

Given the direction and focus of the Regional Growth Strategy and Surrey’s Official Community Plan, growth reporting will now focus more on the Town Centres, Urban Centres and FTDAs as they are individually defined within Surrey’s six communities: City Centre (also represents Whalley), Cloverdale, Fleetwood, Guildford, Newton and Semiahmoo.

City Centre

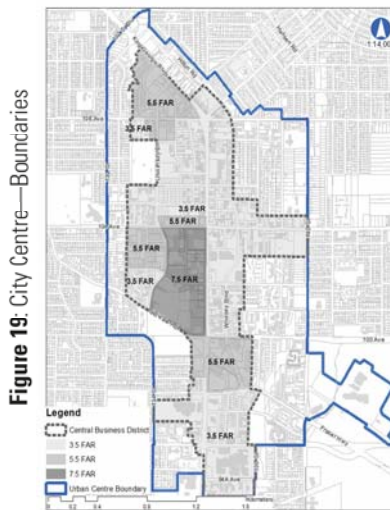
The City of Surrey, through its Official Community Plan, supports a sustainable region with the goal of developing Surrey City Centre as the region’s second Metropolitan Centre. Creating a regional metropolitan core involves establishing Surrey City Centre as a primary focus for employment services, high-density housing, commercial uses, cultural and entertainment connections and mixed and institutional uses.

Extensive civic development has already taken place including a new Senior’s Centre, RCMP E Division Office, Hospital and Outpatient Care Facility, Emergency Room Expansion, City Library, City Hall and the first phases of the expansion of the SFU Surrey campus. Large city-wide cultural events are also held in City Centre such as Party for the Planet and Fusion Festival.

In the longer term, regional focus of development into the area and planned significant improvements in public transit, are expected to increase demand for residential development in the **City Centre Urban Centre (Figure 19)**.

Within the City Centre Urban Centre boundary, total units reached in 2016 is 14,189 (**Figure 20**) which is anticipated to keep increasing over the next five years. As City Centre continues to accommodate a large amount of high density residential, it is estimated that an additional 4,970 units will be added to the City Centre Urban Centre by 2021.

The current three-year average for new units added within the City Centre Urban Centre between 2014-2016 is 359 units per year.



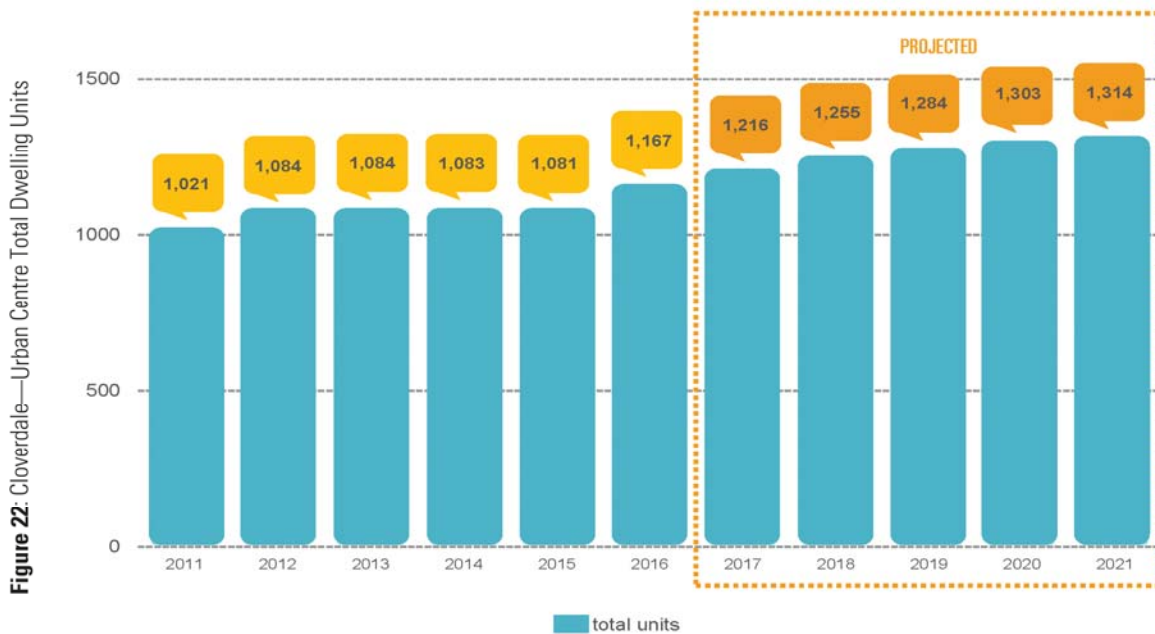
Cloverdale

The Cloverdale Town Centre has a very rich historical past. With one of Surrey’s most recognizable main streets, Cloverdale Town Centre has the advantage of using its distinctiveness to attract investment and remain a viable and important area for Surrey and Cloverdale residents alike.

In consultation with the community, staff are currently working on updating the Cloverdale Town Centre Land Use Plan which will also determine if there are any density increases projected for both the Town Centre and the regional Urban Centre boundaries.

Within the **Cloverdale Urban Centre** boundary (Figure 21), total units reached in 2016 is 1,167 (Figure 22). Cloverdale Urban Centre is not anticipated to accommodate a significant amount of new residential development therefore it is estimated approximately 147 units will be added to the total by 2021.

The current three-year average for new units added within the Cloverdale Urban Centre between 2014-2016 is 28 units per year.



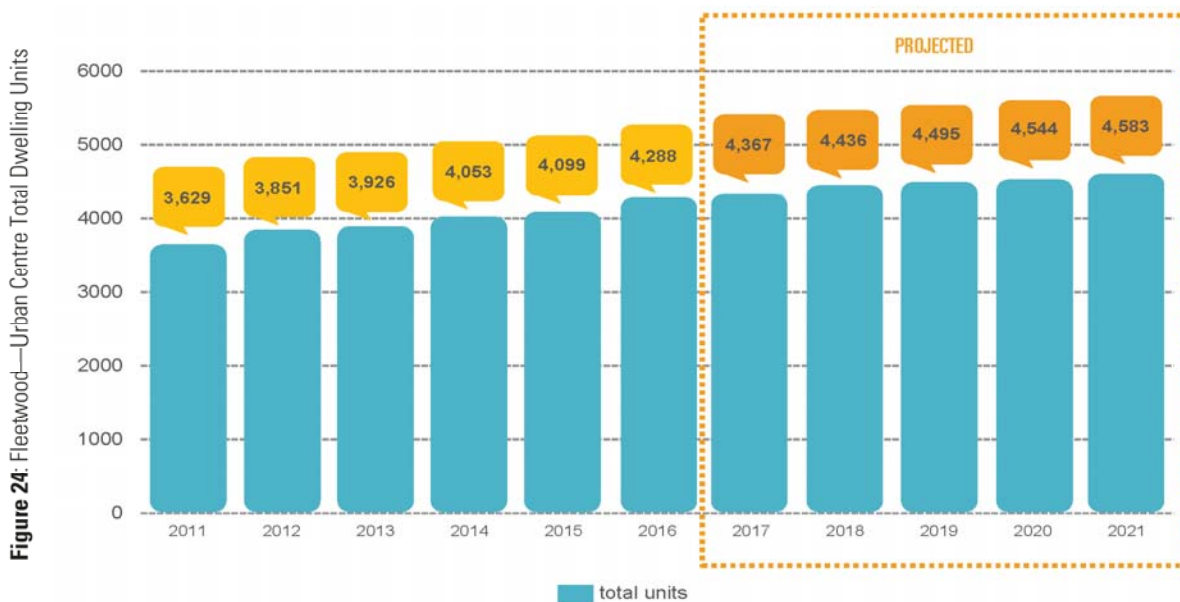
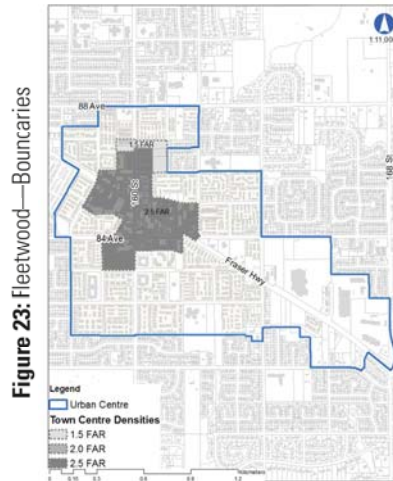
Fleetwood

Surrey’s Fraser Highway is designated a Frequent Transit Corridor in the Regional Growth Strategy. This designation necessitated a review of the policies supporting development in the Fleetwood Town Centre.

The Frequent Transit Corridor designation also increases the need to adjust densities in those areas identified within the **Fleetwood Urban Centre** (Figure 23) that would directly benefit from the extension of rapid transit infrastructure.

Within the Fleetwood Urban Centre boundary, the total units reached in 2016 is 4,288 (Figure 24) which is anticipated to increase slightly over the next five years with the addition of approximately 295 units by 2021.

The current three-year average for new units added within the Fleetwood Urban Centre between 2014-2016 is 78 units per year.



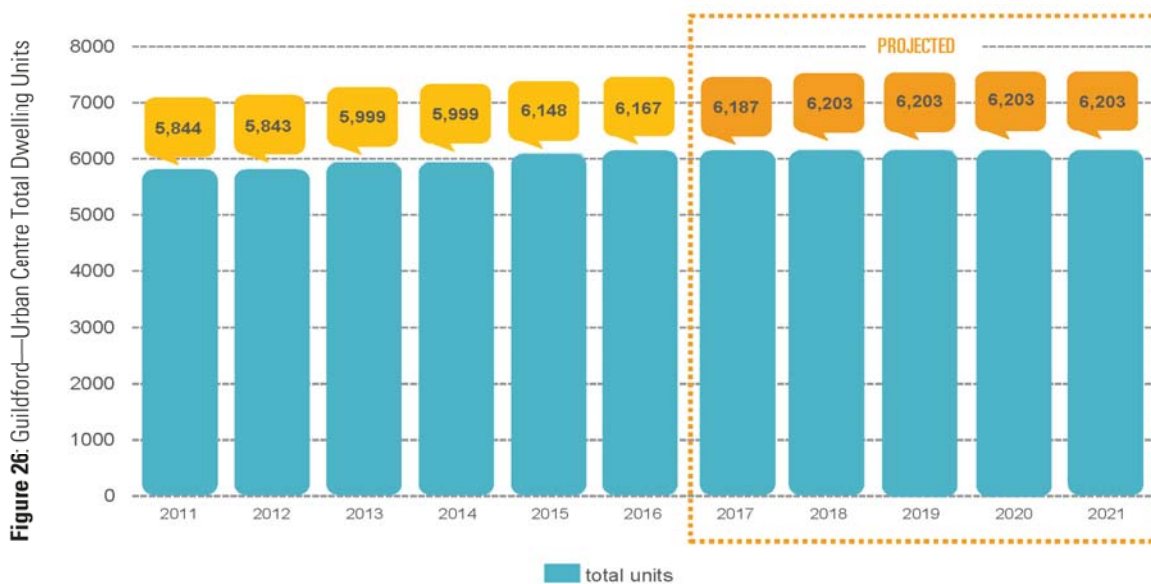
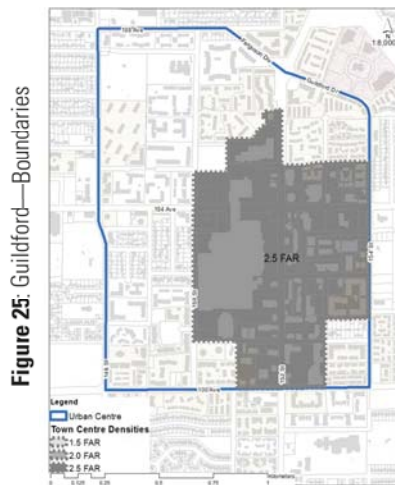
Guildford

The Guildford Town Centre is characterized by overall low-density commercial development, a few stand-alone high density commercial buildings, and older, walk-up style apartments. Higher density residential and commercial development is expected to increase given Guildford’s proximity to Highway #1 (Trans Canada).

Guildford is currently undergoing the preparation of a new Town Centre Plan. Even though significant density increases are not expected in this area, the new plan will identify what, if any, density increases will be expected within the Town Centre Land Use Designation area as well as within the defined **Guildford Urban Centre** area (**Figure 25**).

Within the Guildford Urban Centre boundary, total units reached in 2016 is 6,167 (**Figure 26**). Under the current land use designations, the unit counts are anticipated to slightly increase over the next five years with the addition of approximately 36 units by 2021.

These projections are anticipated to increase in the future, and will be revised once the Guildford Town Centre Plan update is complete in 2018.

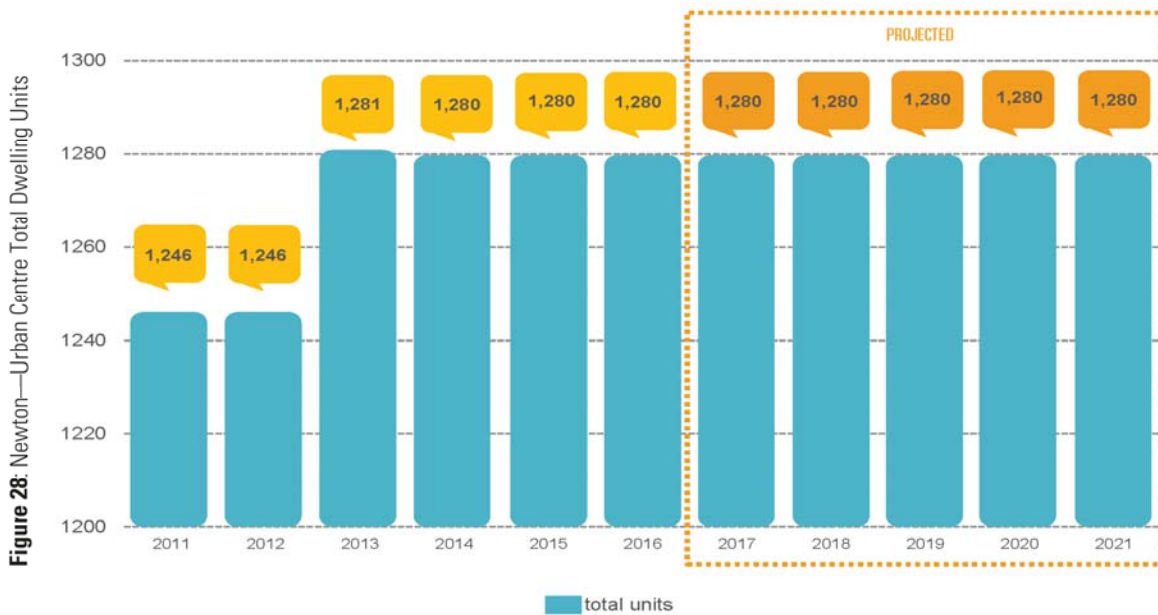


Newton

The **Newton Town Centre** hosts a variety of land uses including civic and recreational facilities, light industrial and medium-to-high density residential. Reflected in the regional **Newton Urban Centre (Figure 27)**, Newton will accommodate higher commercial and retail densities in conjunction with the extension of rapid transit infrastructure along King George Boulevard.

Within the Newton Urban Centre boundary, the total units reached in 2016 is 1,280 (**Figure 28**) which is anticipated to stay at this level over the next five years.

There were no new units added in the Newton Urban Centre between 2014—2016.



Semiahmoo

The **Semiahmoo Town Centre** is a vibrant and pedestrian-friendly area with a mix of shopping, services, entertainment and amenities. Expanding all of these elements and increasing residential densities is the intended vision for Semiahmoo while also sustaining its unique character.

The **Semiahmoo Urban Centre** area (**Figure 29**) is significantly larger than the Town Centre and will therefore have a greater capacity to accommodate population growth over the next 20 years.

Within the Semiahmoo Urban Centre boundary, total units reached in 2016 was 3,304 (**Figure 30**). Current trends indicate only a slight increase in total units over the next five years, with an estimated 150 units being added by 2021.

The current three-year average for new units added within the Semiahmoo Urban Centre between 2014-2016 is 59 units per year.

Figure 29: Semiahmoo—Boundaries

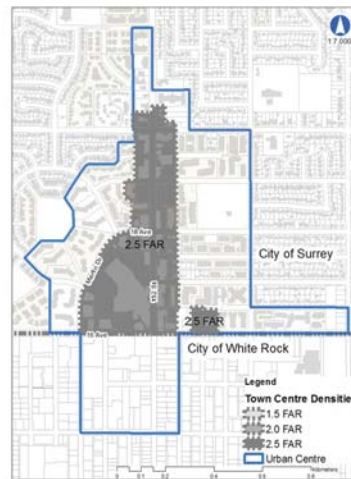
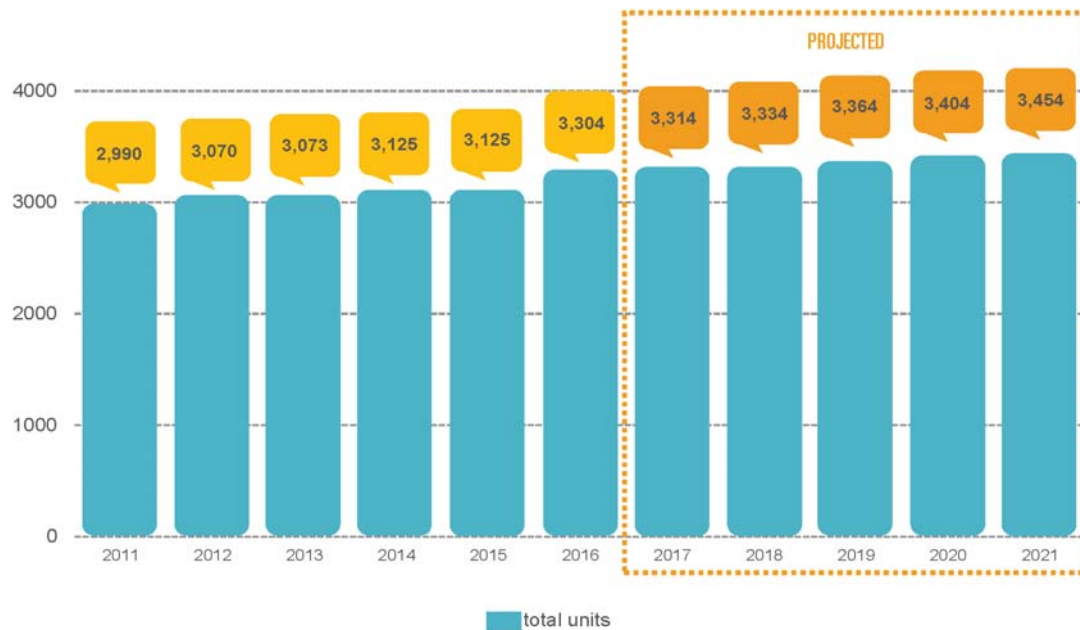


Figure 30: Semiahmoo—Urban Centre Total Dwelling Units

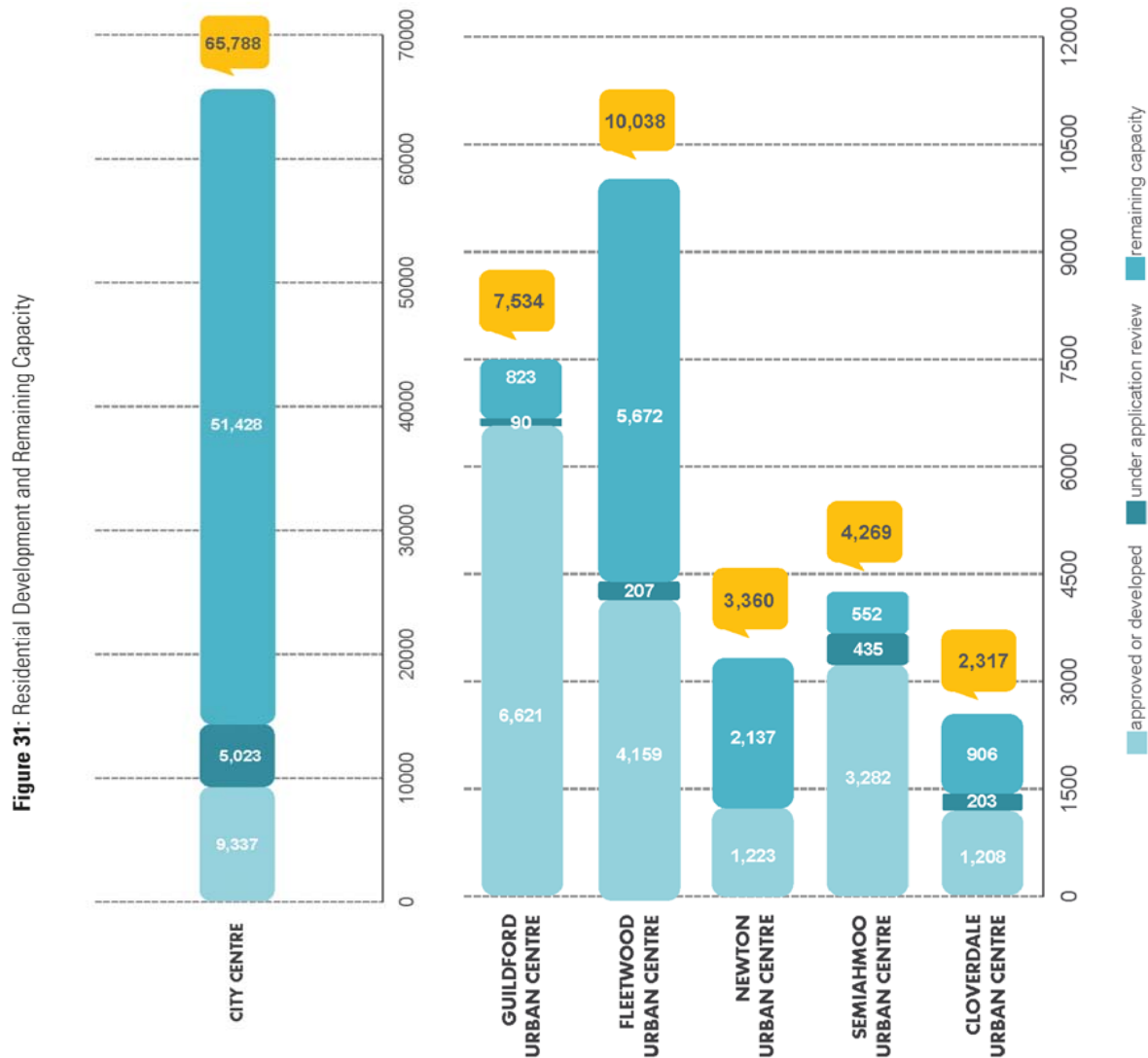


Urban Centre Capacity

As of December 2016, approximately 25,830 dwelling units of the total capacity in Surrey’s City Centre and Urban Centres have either been constructed, issued a Building Permit or received a Development Permit (**Figure 31**).

Dwelling capacity in the City Centre and Urban Centre areas is further bolstered by an additional 5,958 dwelling units that are currently part of development review processes.

These areas collectively provide a total “build-out” capacity of 61,491 residential dwelling units, accommodating approximately 124,222 residents. “Build-out” includes units that are under construction, approved for development, part of a development application, and that are not part of any development review or process of any kind.



Frequent Transit Development Areas

The OCP identifies three types of transit-oriented development areas including Frequent Transit Development Areas (FTDAs), Frequent Transit Corridors and Rapid Transit Station Areas. For the purposes of this report, only FTDAs are measured and reviewed for their contribution to Surrey’s growth.

Surrey has three existing FTDAs: 104 Avenue, East Clayton and Fleetwood. FTDAs in Surrey are eventually anticipated to accommodate dwelling unit and employment increases with higher than average growth rates compared to the rest of the city.

Based on current development policies **104 Ave Corridor (Figure 32)** and **East Clayton (Figure 33)** show the most increases in total units with 104 Avenue expected to accommodate an additional 90 units and East Clayton another 125 units by 2021 with the **Fleetwood FTDA (Figure 34)** remaining unchanged over the next five years.

Dwelling unit totals are expected to increase and be adjusted as each of these FTDAs undergoes additional planning review and as anticipated increases in rapid transit services are added to Surrey’s infrastructure.

Figure 32: 104 Avenue—FTDAs Total Dwelling



Figure 33: East Clayton—FTDAs Total Dwelling Units

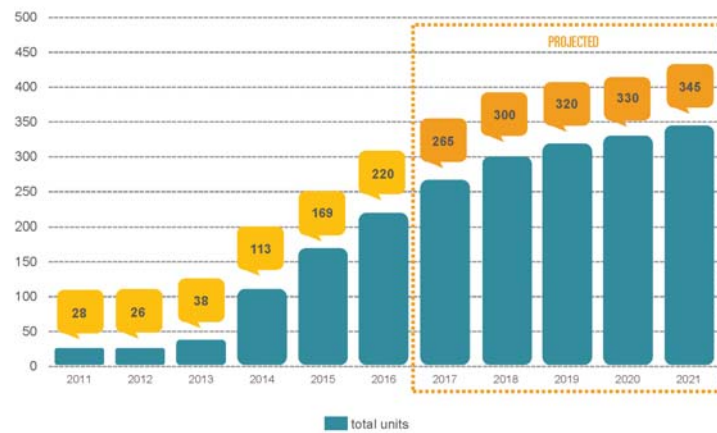
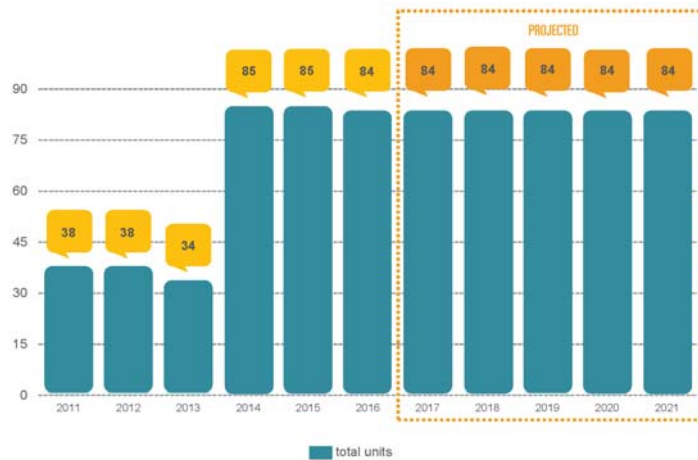


Figure 34: Fleetwood—FTDAs Total Dwelling Units

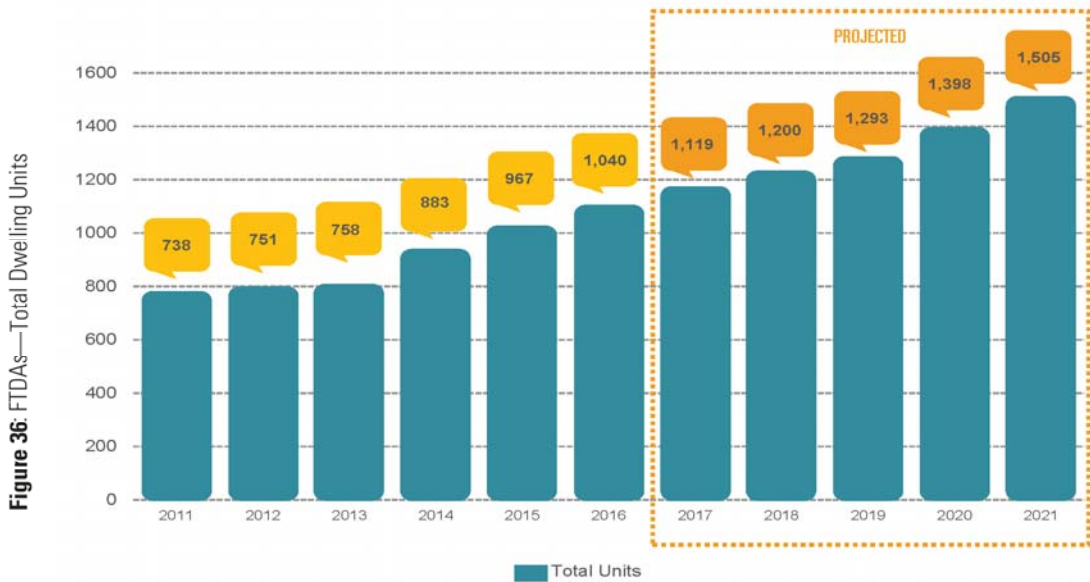
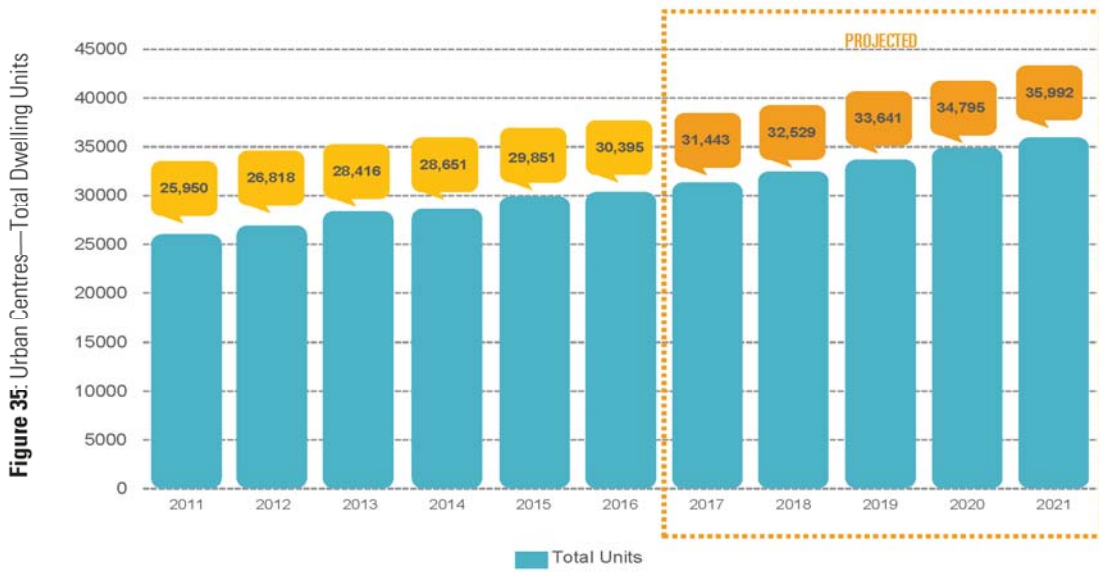


Urban Centres and FTDA: Housing Stock

As a whole, the housing stock available in all of the Urban Centres in Surrey reached a total of 30,395 units in 2016.

As development continues to focus toward Urban Centres, these numbers are expected to increase with an expected addition of 5,597 units over the next five years (Figure 35).

Similarly, in all three of Surrey's Frequent Transit Development Areas, the total number of units reached 1,040 in 2016. Over the next five years, it is anticipated an additional 215 units will be added to these areas (Figure 36).

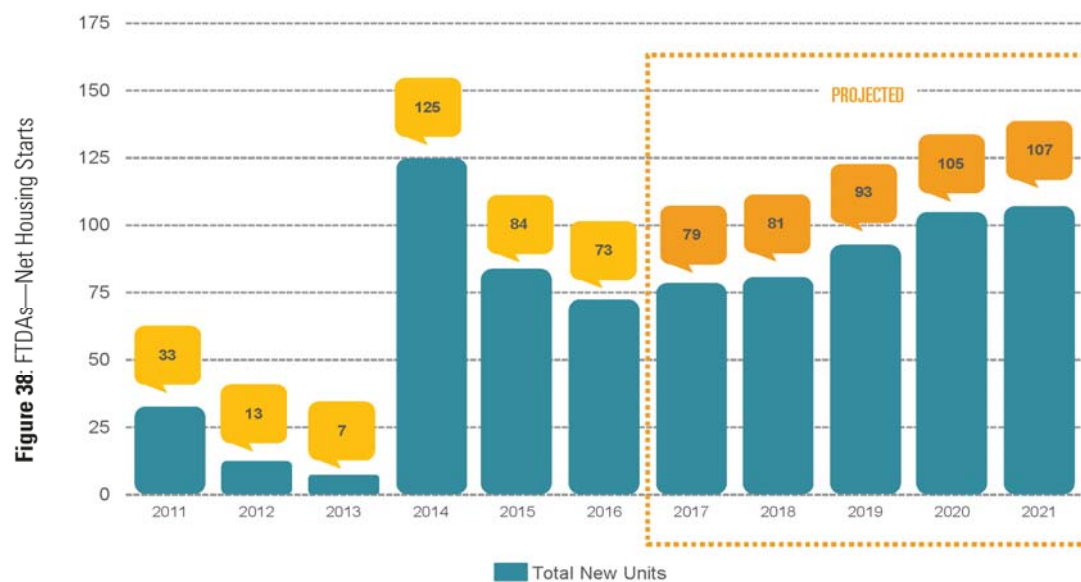
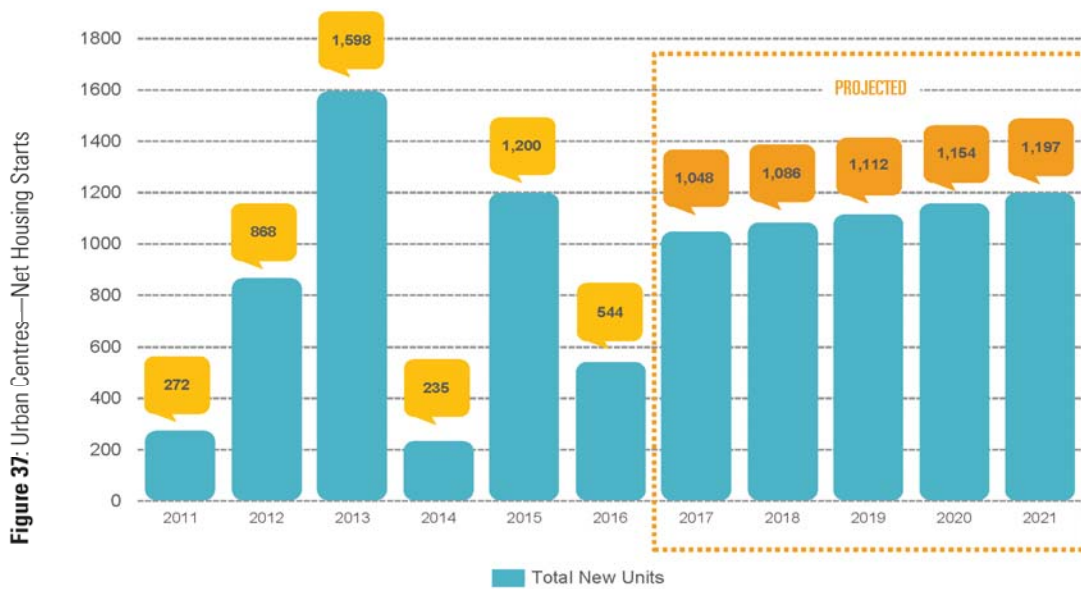


Urban Centres and FTDA: Housing Starts

Housing starts within Surrey’s Urban Centres and Frequent Transit Development Areas have varied considerably over the past five years with 2016 seeing 544 new units added to Urban Centres (Figure 37) and 73 new units added within the FTDA (Figure 38).

Residential development that has easy and convenient access to public transportation routes continues to be a priority within Surrey and within the development community. This demand is expected to increase as housing prices increase and it becomes more of a necessity to locate close to transit services.

The current housing start projections for the next five years see approximately 1,119 units added annually within Surrey’s Urban Centres and approximately 93 units added annually within Surrey’s FTDA.



Secondary Plan Area Capacity

Secondary Plans are policy documents that guide the development and evolution of areas of the City on a smaller scale than the Official Community Plan.

For the purposes of this report, Town Centre and City Centre Plans will not be included in this category because they have been identified in the previous section of the report. The Secondary Plans are shown in **Figure 39**.

With Surrey's estimated need for approximately 3,800 residential units per year, the ability to accommodate these population increases is a critical factor in determining Surrey's capacity to accommodate different types of growth.

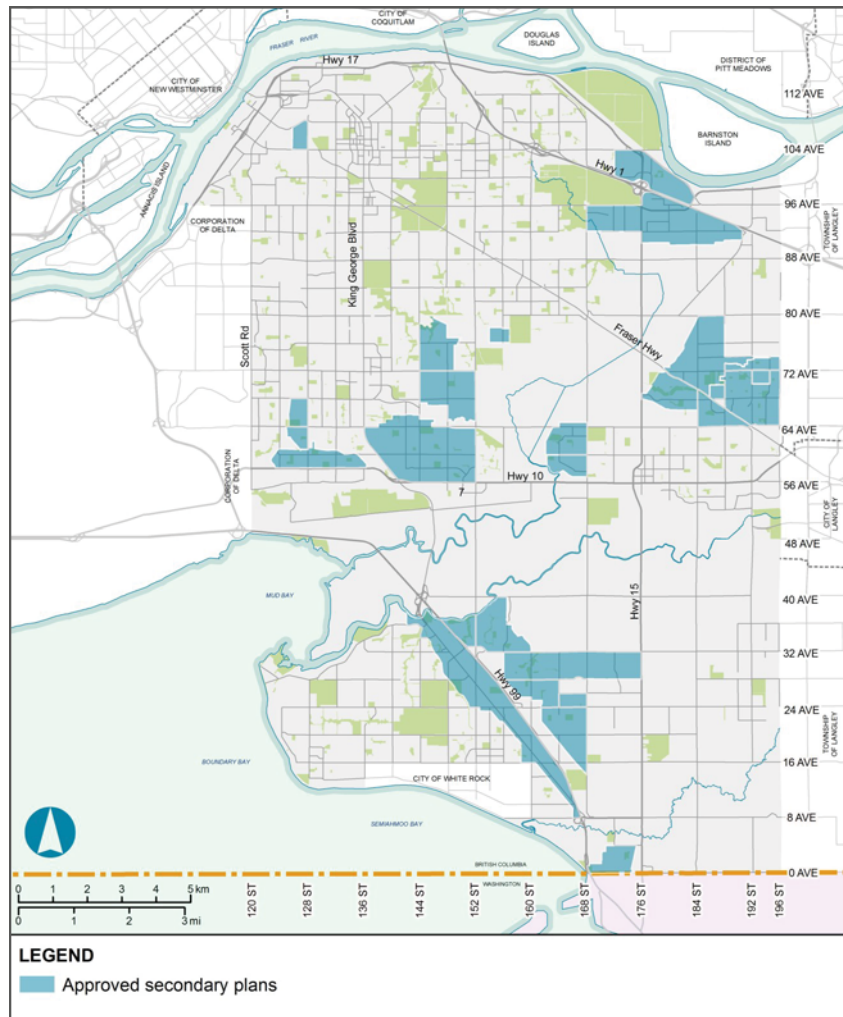
Residential capacity reviews were conducted in Surrey's secondary plan areas (excluding Town Centre Plans) for three main development types: high density development, new community development and infill development.

An analysis was done to determine the ultimate carrying capacity of Surrey from a residential perspective. The residential development capacity within each of the City's approved Secondary Plans (excluding Town Centre Plans).

Figure 40 shows that these Secondary Plan Areas provide a total capacity of approximately 84,053 dwelling units or approximately 224,808 residents.

As of December 2016, approximately 45,700 dwelling units (54.4%), of the total capacity in approved Secondary Plan areas have either been constructed, issued a Building Permit or received Development Permit approval. About 8,332 dwelling units (9.9%) are proceeding through the development review process.

Figure 39: Secondary Plan Areas



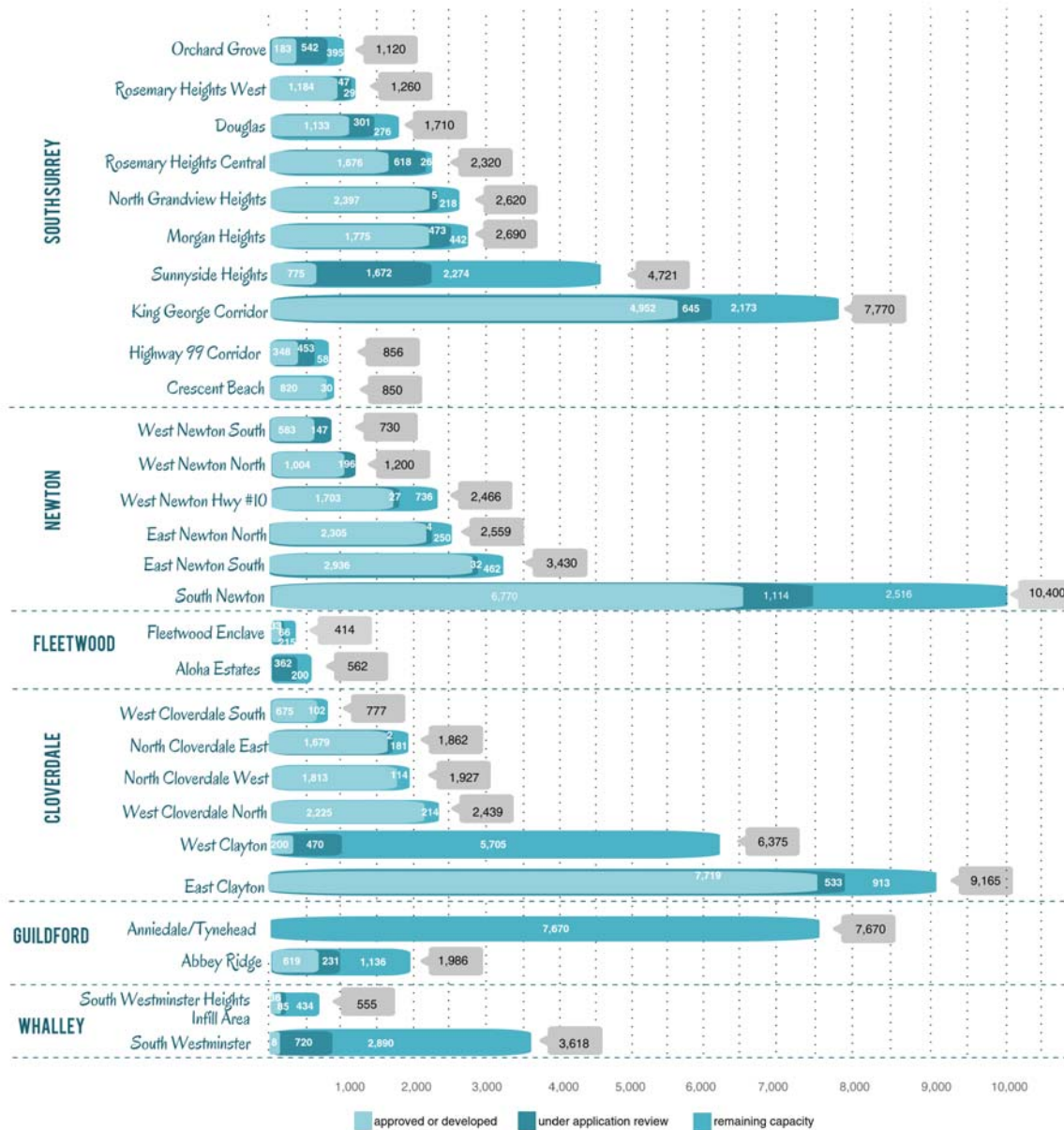
Secondary Plan Area Capacity

The remaining residential capacity in approved Secondary Plan areas, at the end of 2016, is estimated at 30,021 dwelling units, representing a supply sufficient to meet five years of demand for new housing.

Approximately 53.3% of the “approved/developed” residential units in approved Secondary Plan Areas consist of single-family units. Approximately 36% consists of townhouses and 10.7% are apartments. Of the 8,332 dwelling units that are proceeding through the Development Permit process, approximately 31.2% are single family units, 45% are townhouse units and 23.8% are apartment units.

The remaining capacity of 30,021 units in approved Secondary Plan areas, based on approved land use densities, consists of approximately 51% single family units, 30.1% townhouses and 18.9% apartment units.

Figure 40: Secondary Plan Capacity



Infill Development Capacity

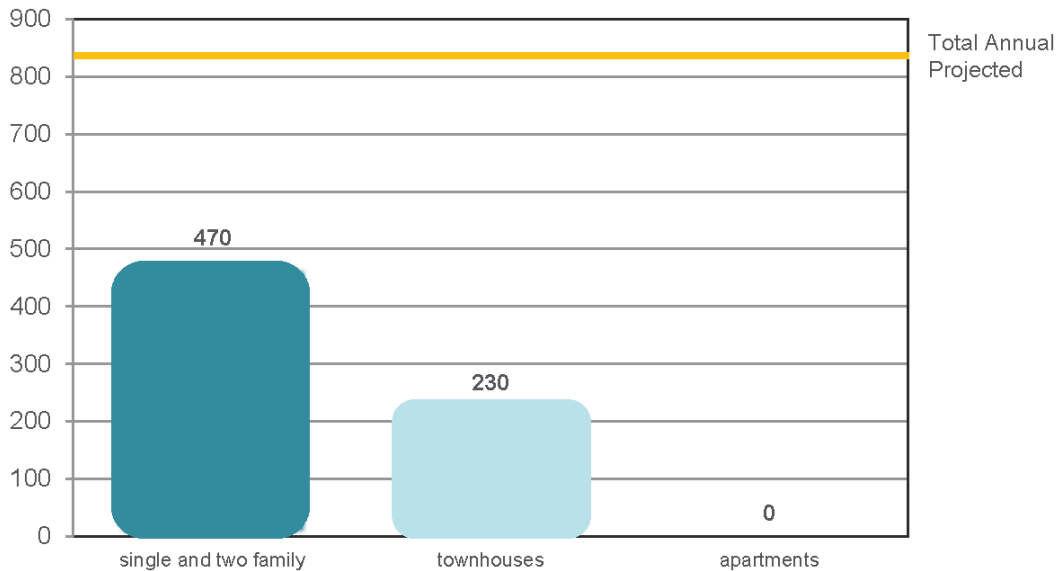
Infill residential development is defined as new, additional residential units constructed in established urban neighbourhoods that are not part of an NCP area, the City Centre Plan Area or any Town Centre Plan Area. Some of these units include “one-for-one” replacement of existing single family homes but most represent additional units achieved through development in vacant lots or through redevelopment that results in densification.

As NCP areas near capacity, there is likely to be increasing pressure for redevelopment of lands occupied by older housing stock in some of Surrey’s established neighbourhoods. This trend has already begun in some neighbourhoods as older, single-family homes on larger lots are being replaced with small lot subdivisions, duplexes, townhouses and apartments. It is expected that the trend toward infill development will increase as people seek housing in locations that are central and well served by transit.

In 2016, there was a net of 700 housing starts in infill areas (**Figure 41**). Of these units, 470 were one and two family dwellings, 230 were townhouse units with 0 apartment units. The multi-family units were generally located along main roads with frequent transit service such as along 120 Street, King George Boulevard and 104 Avenue.

Based on current trends, it is expected that an average of approximately 840 new dwelling units per year, over the next five years, will be developed in infill areas around the City.

Figure 41: Infill Development—2016 Totals and Annual Projection



Infill Development Capacity

Most infill represents adding additional density to an existing neighbourhood through subdividing larger lots into smaller single family parcels or consolidating single family lots in order to construct multiple family developments such as a townhouse complex or apartment building.

In 2016, there were 700 total units added in infill areas. Of this total, 170 units were a direct one-to-one replacement of single family houses with another single family house, 220 were multi-family units constructed as a result of lot consolidation and 310 were smaller single family lots created after subdividing larger lots (**Figure 42**).

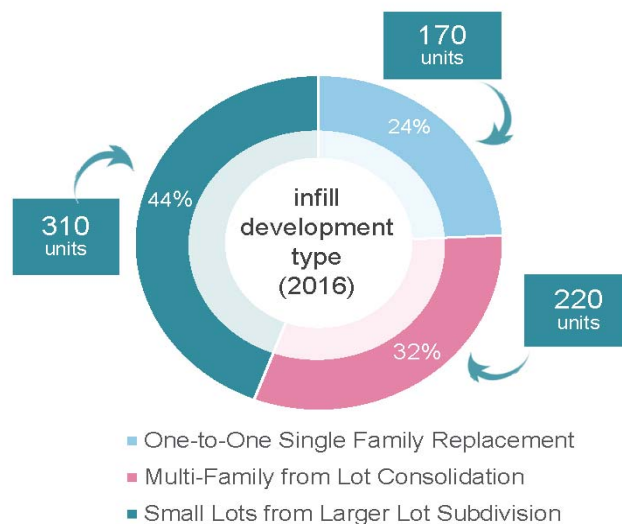
A component of infill development that can be difficult to accurately track is the number of secondary suites that are developed in single family homes.

In 2010, through an amendment to the Zoning Bylaw, Surrey significantly expanded the areas of the City within which secondary suites are permitted and has since focused on accurately accounting for existing and new suites.

Population and dwelling unit projections take secondary suites into account, based on data that the City has collected from utility billings. While there are currently approximately 26,809 identified secondary suites in Surrey, it is expected that this number will increase as new suites are constructed and as more of the existing suites are identified.

The 700 units of infill for 2016 do not include secondary suites which, if counted, would increase the number of total infill units added within Surrey.

Figure 42: Infill Development Type (2016)



New Secondary Plans

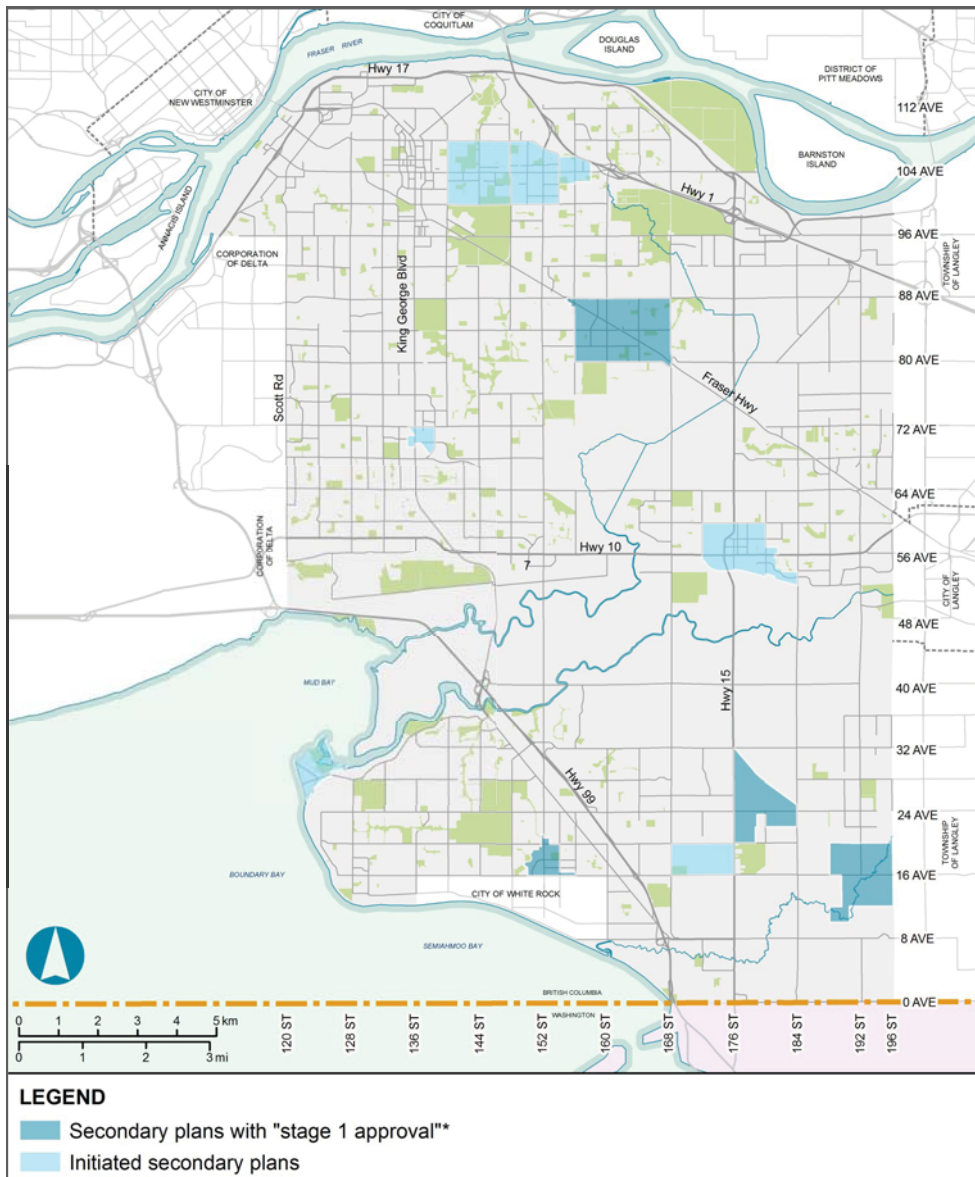
Several Secondary Land Use Plans are currently underway (**Figure 43**). Plans that have received Stage 1 approval from Council include:

- Redwood Heights NCP
- South Campbell Heights NCP
- Fleetwood Town Centre Plan
- South Campbell Heights Plan

Other new plans and plan updates that are pre-Stage 1 include:

- Guildford-104 Ave Corridor Plan
- Grandview Heights 3 NCP
- Crescent Beach Plan Update
- Newton Town Centre Update
- Cloverdale Town Centre Update

Figure 43: Secondary Plans Currently Underway



CBD Growth Calculations

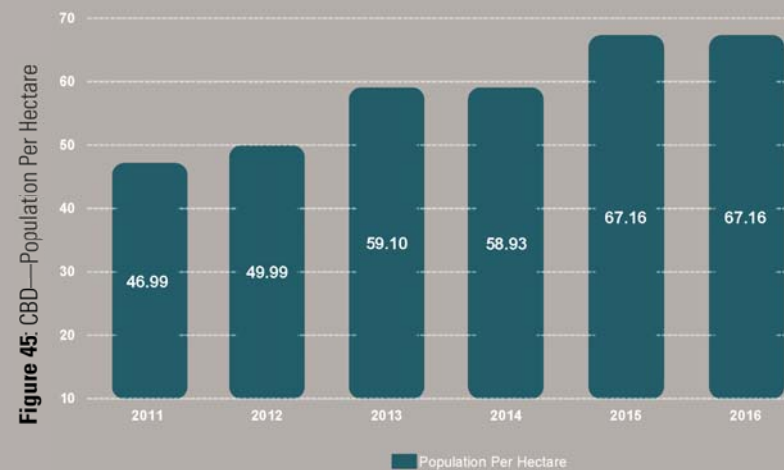
Urban Centres and Frequent Transit Development Areas (FTDAs) are anticipated to accommodate a large portion of Surrey's dwelling unit and employment increases. Both Urban Centres and FTDAs are expected to grow at higher rates compared to the rest of Surrey however, it is anticipated this accelerated growth won't really become evident until after Surrey's planned, undeveloped lands are absorbed.

One indicator for increased density within Surrey's Urban Centres and FTDAs is the "per hectare" analysis. Regardless of the actual number of units added in any given year, this indicator illustrates that densification is taking place which is consistent with the goals of both Surrey's Official Community Plan and Metro Vancouver's Regional Growth Strategy.

A "per hectare" indicator was created for the Central Business District to track units (**Figure 44**), population (**Figure 45**) and employment (**Figure 46**).

Since 2011, units per hectare (uph), along with population per hectare (pph) and employees per acre (epa), have consistently increased in Surrey's Central Business District (CBD) Area. The majority of new residential development in the Central Business District consists of multiple family dwellings, accounting for smaller house sizes and therefore, a slightly smaller increase in population density.

In Surrey's CBD, since 2011, unit density has increased by 47% with population density increasing by 43%. Employee density, on the other hand, has increased by approximately 21%. Given the focus of the CBD as a high density development area, both in terms of residential units and employment, it is likely these upward trends will continue into the future.



Urban Centre: Connectivity

An indicator used to determine the level of connectivity of an area is the Intersection Density Calculation. This indicator is tabulated for each of Surrey's six Urban Centres and illustrates overall, the number of intersections that are present on a per square kilometre basis (includes intersections at the boundary edge). **Figure 47** illustrates how one square kilometre can increase connections when roads and laneways are added to an existing road network.

Increases in intersection connections create additional choice in movement not just for vehicles but also for pedestrians and cyclists allowing for easier movement and increased permeability throughout an urban area.

In 2016, Cloverdale had the highest connectivity at 110.67 intersections per sq. km, compared to any of the other Urban Centres (**Figure 48**). This is due to Cloverdale being the smallest of the Urban Centres at 0.65 sq. km. Cloverdale also has more intersections than Newton, Semiahmoo and Fleetwood Urban Centres.

Surrey's City Centre, on the other hand, has the largest area of all the Urban Centres at 4.73 sq. km and falls second to Cloverdale with over 50.29 intersections per sq. km of area. More than any of the other Urban Centres, City Centre will be adding a high number of intersections as development unfolds. This road network will continue to become more fine grained, increasing the overall connectivity from a pedestrian, cycle and vehicle point of view.

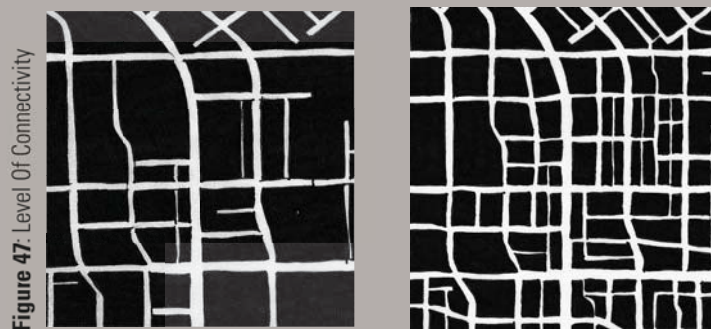
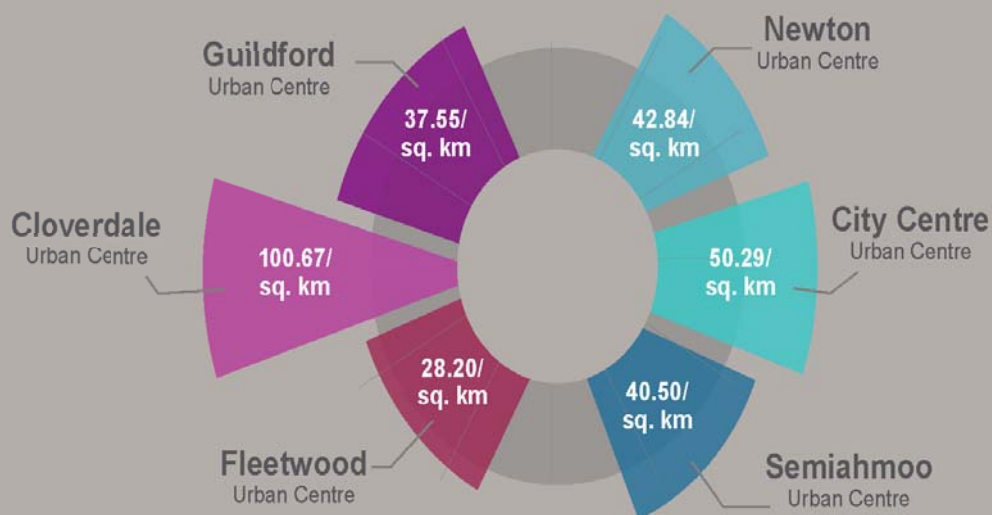


Figure 48: Urban Centres—Intersection Density



Urban Centres and FTDA: Housing Starts

As Surrey continues to grow and complete existing secondary plan areas, residential development will continue to focus toward Surrey’s Urban Centres and Frequent Transit Development Permit Areas.

In 2016, Semiahmoo and Fleetwood saw the strongest growth adding 368 units (68% of the total) compared to the previous five years at 15% (Figure 49).

The trend for housing starts illustrates that, out of all the Urban Centres over the last five years, City Centre Urban Centre continues to accommodate the largest number of units constructed.

For Surrey’s FTDAs, East Clayton continues to out perform both Fleetwood and 104 Avenue, making up 69% of all the FTDA units in 2016 and 53% over the past five years (Figure 50).

Future construction of Surrey’s Light Rail Transit line along 104 Avenue is anticipated to increase development and density within that Frequent Transit Development Area.

Figure 49: Urban Centres—Existing Housing Starts

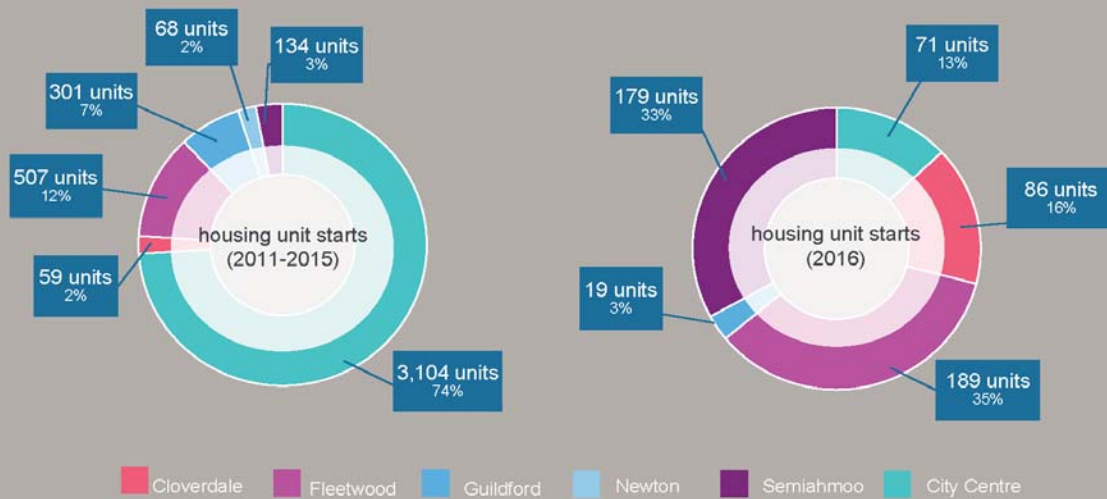
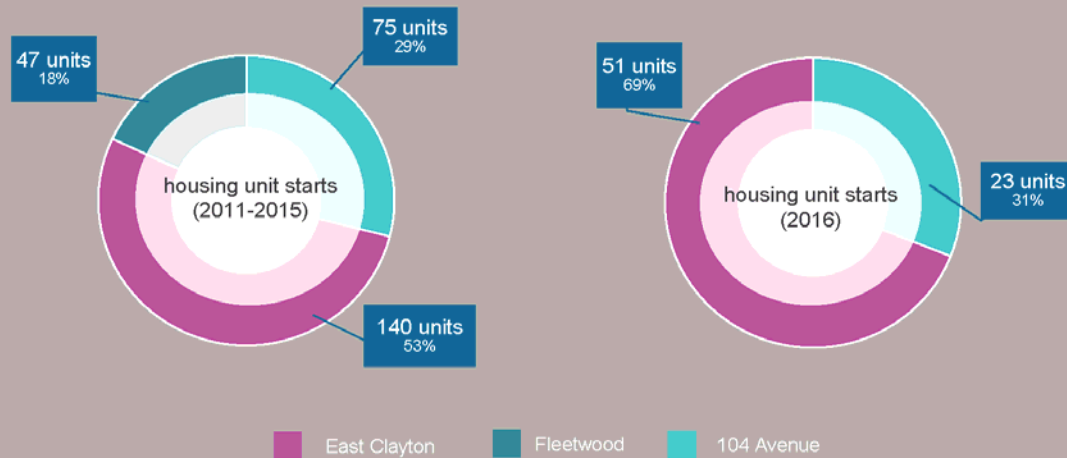


Figure 50: FTDA—Existing Housing Starts







THEME C: INFRASTRUCTURE AND FACILITIES

THEME C SUMMARY

Infrastructure provides the systems and networks that connect a city and supports the functions of contemporary urban life. In this Official Community Plan, the definition of infrastructure includes engineering and utility networks such as sanitary sewers, drainage systems, water distribution lines, energy networks and transportation systems. It also includes civic facilities such as recreation and community centres and libraries as well as a network of parks and greenways that knit Surrey and its neighbourhoods together.

As a geographically large city made up of several distinct urban areas that are separated by agricultural land, Surrey faces challenges in maintaining its extensive infrastructure networks in an efficient and cost-effective manner. This reality places increased importance on the careful planning and management of each network of public infrastructure.

The objectives within Theme C support maximizing the sustainability of Surrey's civic infrastructure by emphasizing low-impact development and construction practices, extending the safe and useful lifespan of public infrastructure assets, minimizing waste and inefficiency, and designing and managing streets, parks and greenways to encourage active transportation (walking and cycling) and to enhance environmental health.

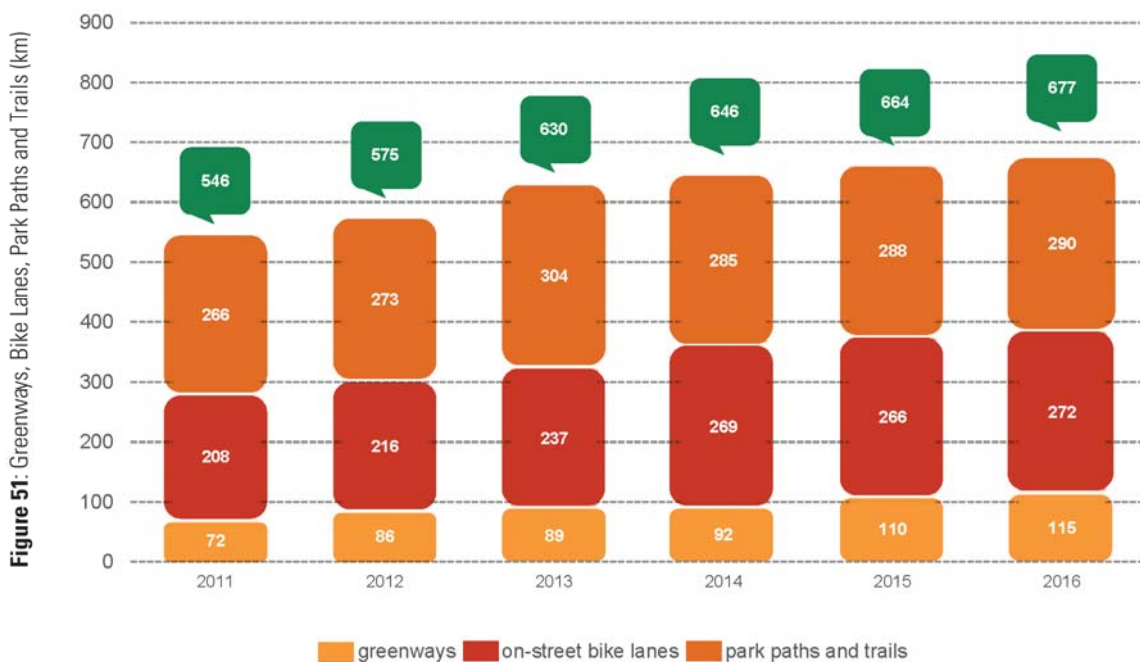


Pedestrian and Cycling Infrastructure

Surrey's Official Community Plan supports providing a comprehensive transportation network that offers reliable, convenient and sustainable transportation choices.

This is supported by providing pedestrian and cycling infrastructure that is safe, accessible and abundant. Over and above sidewalks, Surrey strives to provide greenways, paths, trails and bike lanes for recreational purposes and as support for alternative transportation modes other than the vehicle.

In 2016, there were approximately 13 km of greenways, on-street bike lanes and park paths and trails (**Figure 51**) added to Surrey's pedestrian and cycling infrastructure system.



Parks

Surrey’s identity is intrinsically connected to its parks and green spaces. Surrey maintains over 2,700 ha (6,670 ac) of public parkland and has several significant regional parks maintained by Metro Vancouver.

Surrey’s Parks, Recreation and Culture Strategic Plan identifies different categories of parks and what their intended role is for serving Surrey’s recreational, cultural and environmental protection needs.

These parks are defined as:

City Parks—embody the identity of the city and are readily recognizable as places for city-wide events (e.g. Holland Park).

Community Parks—contain amenities that attract residents from outside their immediate neighbourhood (e.g. West Newton Community Park).

Neighbourhood Parks—serve the needs and are within walking distance of an immediate neighbourhood (e.g. Fun Fun Park).

Nature Preserve: vary in size and are used to protect the intrinsic value of natural areas for biodiversity conservation and habitat connectivity (e.g. Green Timbers Urban Forest).

Park type totals have adjusted over the past five years due to reclassifications; however overall, Surrey continues to add parkland reaching over 2,700 hectares by 2016 (**Figure 52**).



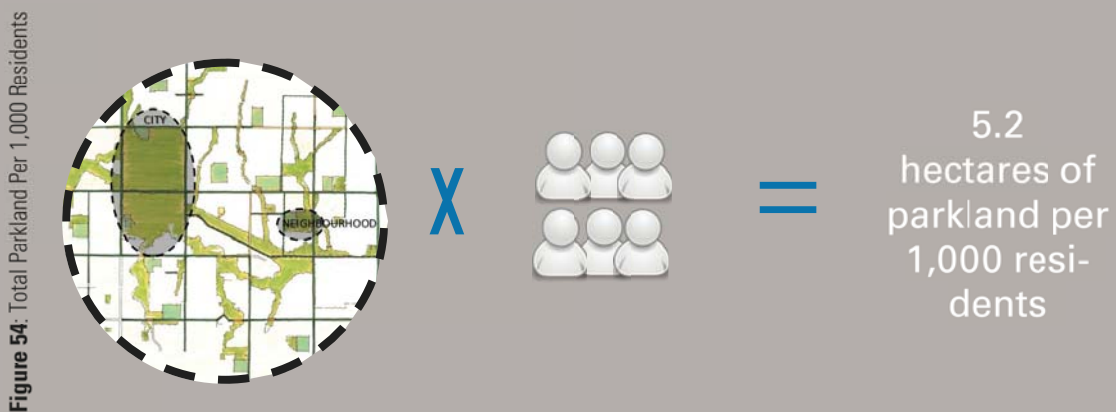
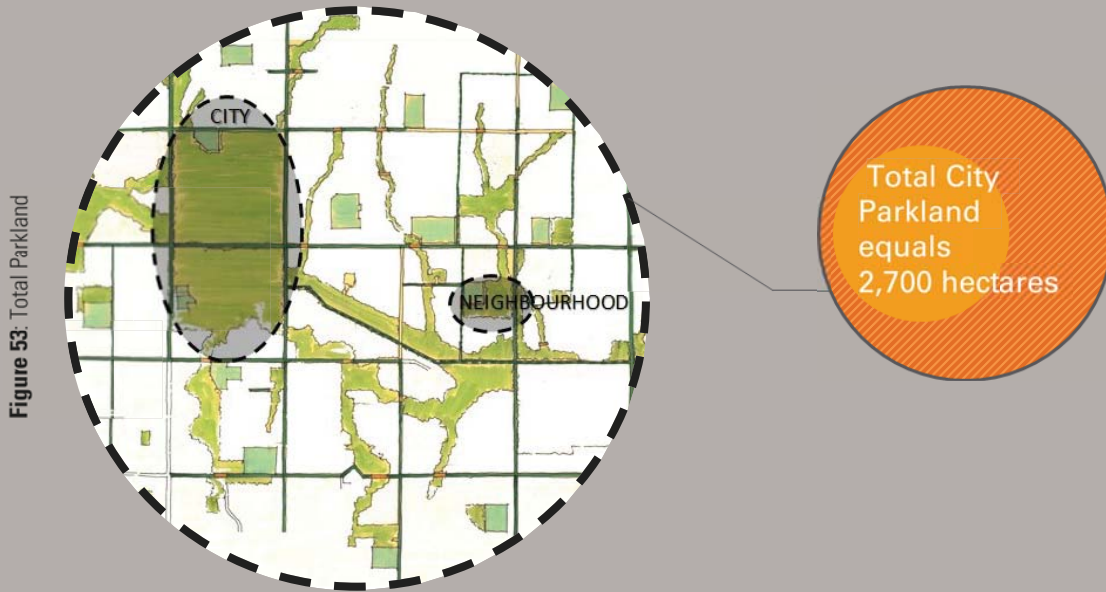
Parkland Density

Surrey’s Official Community Plan supports the continued provision of varied types of parkland for Surrey residents (**Figure 53**). Ratios of park type per 1,000 residents is a goal that the Parks, Recreation and Culture Department strives toward as development continues throughout Surrey at a steady pace.

These park type ratios are generally supported per 1,000 residents:

- City Parks—1.2 ha
- Community Parks—1.0 ha
- Neighbourhood Parks—1.2 ha
- Nature Preserve—0.8 ha

The City strives for an overall ratio of 4.2 ha of parkland per 1,000 residents. In 2016, Surrey exceeded this goal by 1.0 hectare per 1,000 residents (**Figure 54**).







THEME D: ECOSYSTEMS



THEME D SUMMARY

While Surrey has been settled by people of European descent for almost 150 years and virtually all of its original forests and wetlands have been modified by human activity, the City still contains diverse and healthy natural ecosystems that support a rich biodiversity. These ecosystems include extensive tidal flats around Boundary Bay, salmon-bearing streams and their riparian corridors, mature second-growth forests, wetlands, old fields and meadows and successional woodlands. Many of the most significant ecosystems are protected in Regional or City parks or in wild-life management areas; however, other important natural areas exist on private property that have urban development or agricultural potential.

The City of Surrey is committed to identifying and protecting its significant ecosystems and the elements supporting its biodiversity, and managing these public lands to maintain a healthy natural environment. The City also influences the management of private lands that contribute to ecological health through regulation and by encouraging best practices.



Biodiversity Conservation

The foundation of ecosystem management is the identification of sensitive and significant ecosystems. The protection of Surrey’s natural ecology will ensure Surrey remains a highly livable, attractive and memorable place to live, work or play.

As an important step toward ecosystem protection and enhancement, Surrey’s City Council endorsed the Biodiversity Conservation Strategy in order to prioritize options and establish management criteria for a Green Infrastructure Network (GIN) (Figure 55). Surrey’s GIN comprises a natural interconnected network of hubs, sites and corridors that conserves natural ecosystem values and functions.

A key component of the BCS is to work to reach the ultimate level of protection for these sensitive biodiverse areas by securing lands under public ownership. Currently, approximately 34%, or 1,230 hectares (3,069 acres) of the GIN is privately owned (Figure 56).

Types of private ownership is not tracked at this time but can be comprised of several different distinct classifications each of which would require specific measures to obtain from both a public-ownership perspective or from a protection perspective. It is anticipated that, over time, these lands may be transferred into public ownership through development processes thereby increasing the total amount of protected Green Infrastructure Network.

Figure 55: Green Infrastructure Network (GIN)



Figure 56: GIN Ownership



Shade Trees

Surrey identifies tree canopy coverage as a necessary and vital component to overall biodiversity health and longevity.

Surrey’s OCP identifies several measures that can be taken to ensure the number of trees are increased on public property. This takes place during development when street trees are added to boulevards as well as part of a larger tree-planting program lead by the Parks, Recreation and Culture Department.

Shade tree inventories are conducted on a limited basis. Current levels are based on 2012—2016 data which shows shade trees planted on public property during the past five years are consistent over the previous decade (**Figure 57**).

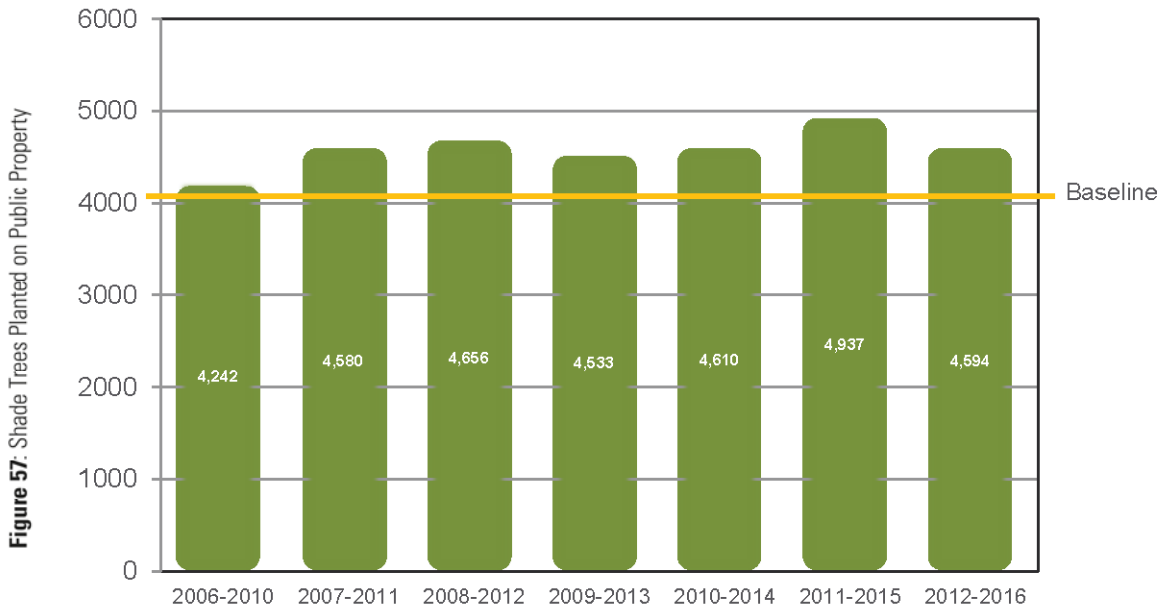


Figure 57: Shade Trees Planted on Public Property

Natural Ecosystem Protection

Surrey's OCP supports the management, protection and enhancement of Surrey's natural ecosystems. Two indicators Surrey is tracking to determine how much of Surrey's natural ecosystem is being protected is: a) the amount of the GIN that is being added to public ownership; and b) percent tree canopy coverage. **Figure 58** shows Surrey's GIN Network.

In 2016, there are approximately 1,230 hectares of the GIN that is held in private ownership. This is a reduction of approximately 53.4 hectares since 2013 when the GIN was originally created. Of this 53.4 ha, approximately 19.28 ha were added to either a City or Regional park system.

Figure 58: Green Infrastructure Network added to Public Ownership







THEME E: ECONOMY

THEME E SUMMARY

The City of Surrey is committed to developing a complete community that balances a high-quality living environment with a diverse, vibrant and sustainable local economy. A strong local economy generates a wide range of stable jobs for Surrey residents, supports a robust and stable tax base to fund essential community services and provides wide access to consumer goods, services and business investment opportunities.

Surrey enjoys a number of advantages that will enhance its economic position within the region, including excellent transportation links within and beyond the Region, the emergence of City Centre as the primary metropolitan core for the South of Fraser area, a large skilled labour force, fertile and abundant agricultural lands, two growing post-secondary institutions and significant reserves of underdeveloped industrial land.

The objectives in Theme E aim to enhance sustainable economic growth in Surrey and take advantage of emerging business opportunities in order to support a broad-based, vibrant, high-quality economy.



Non-Residential Construction Values

A strong economic base is an essential component of a complete city. Official Community Plan policies include: a) ensuring that sufficient land is available at appropriate locations to provide for balanced business development and b) encouraging economic development to achieve a ratio of one job in Surrey for each resident in the labour force.

Year-by-year total construction values of building permits issued for industrial, commercial and institutional building projects since 2011 (**Figure 59**) show 2016 reaching approximately \$392 million in new building construction value for all three use types (institutional, industrial and commercial) amounting to approximately 2.7 million square feet of new business floor area.

The construction value of industrial, institutional and commercial use types comprised 26.7% of the total construction value for the City in 2016.



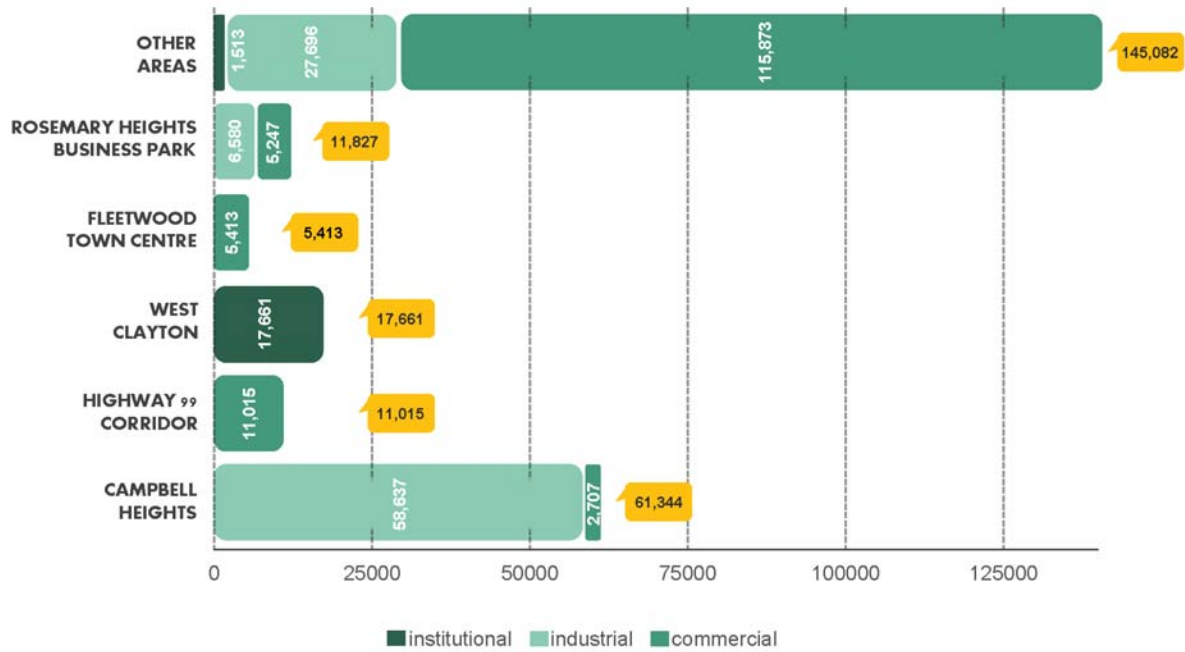
Non-Residential Floor Space

For industrial, commercial and institutional floor space in the city, Campbell Heights accounted for approximately 63.1%, or 58,637 sq. m (631,165 sq. ft.) of the total new industrial floor place added in 2016 while Rosemary Heights accounted for approximately 7.1%, or 6,580 sq. m (70,826 sq. ft.) (Figure 60).

Surrey's Highway 99 Corridor experienced significant commercial development at 11,015 sq. m (118,566 sq. ft.) with Rosemary Heights and Fleetwood Town Centre also experiencing a significant amount of commercial development at 5,247 sq. m (56,478 sq. ft.) and 5,413 sq. m (58,265 sq. ft.) respectively.

It is expected that industrial and commercial development in City Centre, the Town Centres, and Campbell Heights as well as other employment areas, will contribute significantly to Surrey's business growth over the next five years.

Figure 60: Industrial, Commercial and Institutional Construction - New Floor Space (m²)



Non-Residential Floor Space

Overall, there has been an increase in commercial and institutional floor space in both Surrey's Urban Centres and Frequent Transit Development Areas.

The percent of commercial and institutional development within Urban Centres has increased since 2013 (Figure 61). In 2016, 5,413 sq. m (58,263 sq. ft.) of commercial space was added, all of which was within the Fleetwood Urban Centre. In 2016, 490 sq. m (5,272 sq. ft.) of institutional space was added, all of which was located within the City Centre Urban Centre.

There was no new commercial or institutional development added within any Frequent Transit Development Areas (FTDAs) in 2016 (Figures 62).

Figure 61: Urban Centres—Commercial and Institutional Floor Space Added

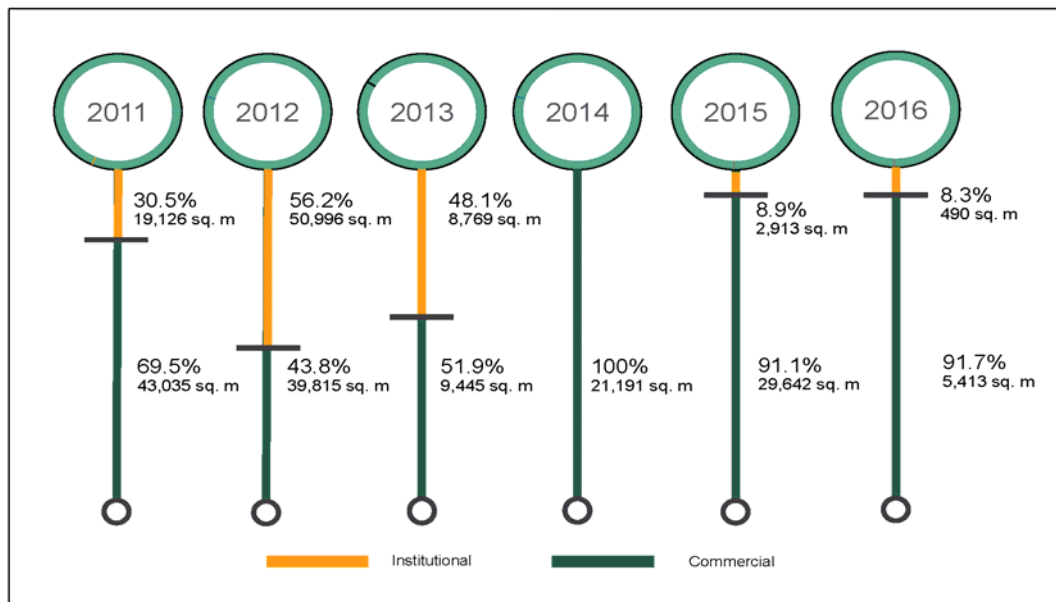


Figure 62: FTDA—Commercial and Institutional Floor Space Added



Employment Land Base

Surrey has adopted policies that require careful monitoring of the City's employment land base and protection of that land base for employment uses. In 2008, City Council approved the Employment Lands Strategy with the objective of determining an adequate and well-located supply of employment lands for both the near and long term.

Surrey also monitors its employment land base totals as it compares to the regional estimates in order to align with the employment projections adopted in the Regional Growth Strategy in 2011.

While both the City of Surrey and Metro Vancouver conduct employment land inventories, different evaluations are used for each which creates discrepancies between the two sets of numbers.

These discrepancies include:

- Metro Vancouver classifies employment lands based on uses actually taking place on site while Surrey classifies employment lands based on OCP land use designations;
- Metro Vancouver includes rail lines, corridors and spurs into the totals while Surrey does not; and
- Metro Vancouver does not include significant parks and green spaces while Surrey does.

Metro Vancouver employment land surveys and classifications only include lands with industrial or mixed-employment areas and do not include commercial areas. Surrey reviews commercial areas separately and provides totals reflecting capacity for those areas.

In Surrey, Industrial and Mixed Employment lands are broken down into four 'activity types' including:

Developed: lands that already have buildings constructed on them, or lands that use large yard space for the running of their business, where no potential for additional development can take place. Examples include office and warehouse buildings, rail yards and storage areas, and equipment and buildings used for port operations.

Under-Developed: lands that are currently being used but have the capacity to accommodate new building construction and or expansion of existing yard space or business operations. Examples include temporary outdoor storage areas, small older buildings on lots, vehicle sales lots and lots with pre-existing non-conforming uses such as single family dwellings.

Vacant: lands that have no buildings or identified improvements or any type of uses occurring.

Undevelopable: lands that will more than likely not expand beyond their current uses nor accommodate additional new uses or businesses. Examples include rail lines, corridors or spurs, utility corridors, properties with hazards such as steep slopes, and properties that have park, green space or streams that require ongoing protection.

Employment Land Base: Industrial and Mixed-Employment

As of December 2016, approximately 14% or 220 hectares (543 acres) of industrial (**Figure 63**) land is vacant or available for development and approximately 34% or 437 hectares (1,079 acres) of mixed-employment land is vacant or available for development (**Figure 64**).

These include serviced land, land within reasonable distance of infrastructure or utility corridors (to allow for relatively economical servicing) and land that will be developed in the longer term.

Campbell Heights contains the majority of land designated Mixed-Employment in the OCP at 270.7 hectares (668.8 acres) allowing for ample future development opportunities.

Figure 63: Land Uses—Industrial (ha)

Industrial Land (2016)	Developed	Under-Developed	Vacant/Undeveloped	SUB-TOTAL	Un-Developable	TOTAL
Currently or Partially Occupied with Industrial Uses	734	278	0	1,012	0	1,012
Currently or Partially Occupied with Non-Industrial Uses	39	29	0	68	0	68
With Infrastructure or Utility Corridors, Steep Slops or Park and Open Spaces	0	0	0	0	269	269
Vacant	0	0	220	220	0	220
TOTAL	773	307	220	1,300	269	1,569

Figure 64: Land Uses—Mixed Employment (ha)

Mixed-Employment Land (2016)	Developed	Under-Developed	Vacant/Undeveloped	SUB-TOTAL	Un-Developable	TOTAL
Currently or Partially Occupied with Mixed-Employment Uses	189	2	0	191	0	191
Currently or Partially Occupied with Non-Mixed-Employment Uses	190	294	0	484	0	484
With Infrastructure or Utility Corridors, Steep Slops or Park and Open Spaces	0	0	0	0	178	178
Vacant	0	0	437	437	0	437
TOTAL	379	296	437	1,112	178	1,290



Employment Land Base: Commercial

Surrey’s 2008 Employment Lands Strategy also focused on ways in which Surrey can provide a diverse range of jobs for its residents that focuses on commercial uses. Commercial land available for development is spread throughout Surrey including City Centre, Newton, Cloverdale and South Surrey (King George and Highway 99 Corridors).

As of December 2016, approximately 13% or 95 hectares (234 acres) of commercial land (**Figure 65**) is vacant or available for development. This includes serviced land, lands within reasonable distance of infrastructure or utility corridors (to allow for relatively economical servicing) and land that will be developed in the longer term.

In Surrey, Commercial lands are broken down into four ‘activity types’ including:

Developed: lands that already have buildings constructed on them, or lands that use large yard space for the running of their business, where no potential for additional development can take place. Examples include major stand-alone retail or wholesale businesses, filming studios, assembly halls, training or vocational schools or indoor recreational uses.

Under-Developed: lands that are currently being used but have the capacity to accommodate new building construction and or expansion of existing yard space or business operations. Examples include vehicle, RV and boat sales lots, retail uses, parking lots or pre-existing non-conforming uses such as single family dwellings.

Vacant: lands that have no buildings or identified improvements or any type of uses occurring.

Undevelopable: lands that will more than likely not expand beyond their current uses nor accommodate additional new uses or businesses. Examples include utility corridors, properties with hazards such as steep slopes, and properties that have park, green space or streams that require ongoing protection.

Figure 65: Land Uses—Commercial (ha)

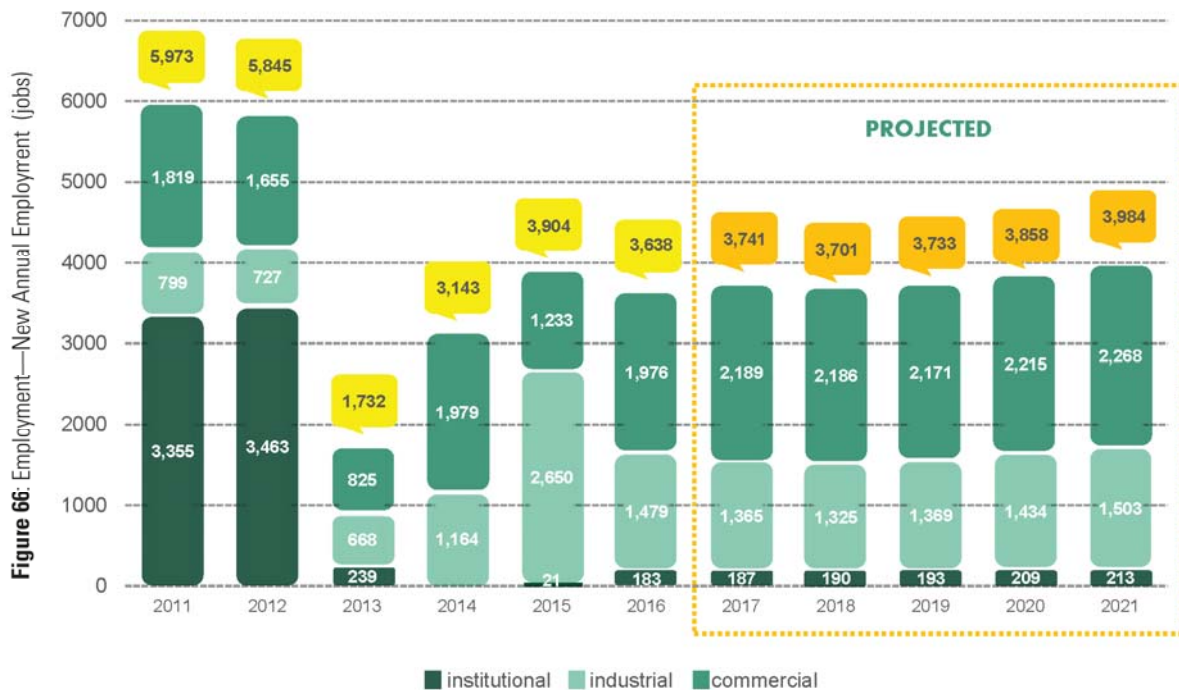
Commercial Land (2016)	Developed	Under-Developed	Vacant/Undeveloped	SUB-TOTAL	Un-Developable	TOTAL
Currently or Partially Occupied with Commercial Uses	373	90	0	463	0	463
Currently or Partially Occupied with Non-Commercial Uses	63	79	0	142	0	142
With Infrastructure or Utility Corridors, Steep Slopes or Park and Open Spaces	0	0	0	0	57	57
Vacant	0	0	95	95	0	95
TOTAL	436	169	95	700	57	757

Employment: New Jobs Added Annually

It is expected that Surrey’s employment rates will continue to grow at a pace that exceeds population growth as continued planning initiatives provide additional lands and attractive locations for business development.

Figure 66 illustrates overall employment between 2011 and 2021. It is expected that industrial and commercial construction will continue to gain momentum in Surrey as is indicated in the approximately 40.7% of industrial employment and 54.3% of commercial employment added to the economy in 2016.

It is expected that institutional employment will also gain momentum over time as new projects related to government services, education, and health care facilities are planned in response to the needs of Surrey’s growing population.



Commercial in nature at 49.3%, including jobs as well as transportation/ and institutional jobs is expected to

2016	Cloverdale	Fleetwood	Guildford	Newton	South Surrey	Whalley	TOTAL
Industrial	8,070	290	12,990	19,670	10,480	9,210	60,710
Commercial	9,140	6,230	9,780	19,630	23,860	20,930	89,570
Institutional	1,930	1,610	2,260	7,200	4,080	14,160	31,240
TOTAL	19,140	8,130	25,030	46,500	38,420	44,300	181,520

Employment

Note: -residential calculations -residential
in
Source: 21
Note: a c h o m e s i d e n t i a l
Data -b a s e d
Industrial a n a l y t o
Commercial a n d h o l e s a l e,
related

Employment: Urban Centres

Urban Centres within Surrey are anticipated to accommodate a large portion of Surrey's employment increases. This growth isn't anticipated to take place on a significant level however, until Surrey's undeveloped lands are absorbed.

Overall employment in Urban Centres was largely accommodated within City Centre (**Figure 68**), a trend that is expected to continue over the next five years.

Commercial uses provide the most jobs overall but both commercial and institutional added approximately 2,500 each since 2011 (**Figure 69**).

Figure 68: Urban Centres—
Total Employment by Area (jobs)

Urban Centres	2011	2016	2021 (projected)
City Centre	24,189	28,303	30,302
Cloverdale	2,614	2,631	2,631
Fleetwood	3,803	3,878	4,102
Guildford	5,566	6,440	6,440
Newton	5,998	6,155	6,215
Semiahmoo	4,038	4,038	4,068
TOTAL	46,208	51,445	53,758

Figure 69: Urban Centres—
Total Employment by Type (jobs)

Urban Centres	2011	2016	2021 (projected)
Industrial	1,022	1,022	1,021
Commercial	33,113	35,489	37,779
Institutional	12,074	14,916	14,958
TOTAL	46,209	51,426	53,758



Employment: FTDAs

FTDAs don't play as large a regional role as Urban Centres but they are still anticipated to accommodate more jobs as development continues to take advantage of access to rapid transit or increased transit services.

Over the past five years, the Fleetwood FTDA has accommodated the highest amount of employment (**Figure 70**), however, the 104 Avenue FTDA is expected to provide greater employment growth to the year 2021.

Commercial uses dominate in FTDA's with over 3,700 jobs (**Figure 71**), which is anticipated to continued to the year 2021.

Figure 70: FTDA's—
Total Employment by Area (jobs)

FTDA's	2011	2016	2021 (projected)
104 Avenue	1,776	1,776	1,776
East Clayton	10	36	96
Fleetwood	2,243	2,243	2,288
TOTAL	4,029	4,054	4,160

Figure 70: FTDA's—
Total Employment by Type (jobs)

FTDA's	2011	2016	2021 (projected)
Industrial	45	45	45
Commercial	3,703	3,729	3,834
Institutional	280	280	280
TOTAL	4,028	4,054	4,159

Jobs Ratio

The economic policies within Surrey's Official Community Plan are intended to create a better balance between Surrey's residential and business tax base.

This balance is a key element in ensuring a strong financial base on which to support the delivery of services to the City's residents and businesses.

The current job-to-workforce ratio for Surrey (2016) is estimated at 0.68 jobs per resident worker (**Figure 72**), a slight increase from the 2009 level of 0.65.

Figure 72: Job-to-Workforce Ratio







THEME F: SOCIETY AND CULTURE



THEME F SUMMARY

As Surrey continues to grow and evolve, it faces new challenges and opportunities for building a safe, healthy, inclusive and culturally vibrant city. Population growth places pressure on Surrey's existing social services, protection services, affordable housing stock, recreation facilities, childcare and education centres, libraries and cultural facilities. Growth can also contribute to sustainability and increased liveability however, by enhancing the City's social and cultural infrastructure and by increasing the range and quality of services available to Surrey residents.

Surrey's demographics are changing and social-cultural services need to anticipate and adapt to these changes. Surrey's population is becoming more culturally and linguistically diverse, with a growing proportion of seniors and a continuous growth in the numbers of children, youth and young families. In response, this Official Community Plan places increased emphasis on partnerships to address affordable housing, skills training and education, healthy communities and childcare issues. This Official Community Plan also recognizes the increasing importance of cultural services (arts and heritage) in attracting investment and economic growth.

The nine objectives within Theme F aim to leverage growth in order to improve the quality of life for all of Surrey's current and future residents and visitors and to build a safe, healthy and inclusive city.



Schools and Daycares

The Surrey School District is the largest in British Columbia with 101 elementary schools, 19 secondary schools, 5 district learning centres, 1 Blended School and 3 Adult Education centres. Total current enrollment is approximately 70,265 students, broken down between elementary, secondary, distributed learning, learning centres and other (**Figure 73**).

Although there were no new schools constructed in 2016, to address and keep pace with the challenge of managing rapid growth in Surrey, the School District plans to complete upgrades or new construction of seven schools by 2020.

When students aren't in school, day care availability is an important factor in a community's ability to accommodate the needs of young families.

The most recent figures for numbers of licenced day care spaces in 2016 levels of 19 spaces per 1,000 persons. For total numbers, that equates to approximately 10,021 spaces. This includes all classifications of daycares including group, family, multi-age, in-home and preschool.

Figure 73. Total Student Enrollment

2016	Total Current Enrollment
Elementary	41,723
Secondary	27,300
Distributed Learning	235
Learning Centre	795
Other	212
TOTAL	70,265



Protected Heritage and Urban Agriculture

Heritage protection of natural and human built sites has remained relatively constant. In 2016, there were no new buildings protected keeping the total number of protected heritage assets in Surrey to 65 (**Figure 74**).

From a community perspective, adding community gardens and expanding garden plots adds urban agricultural amenities into neighbourhoods providing a benefit to residents by creating opportunities for them to create greater connections to the food they consume.

A significant number of new garden plats were created in 2016 (**Figure 75**) with the addition of two new sites including Chuck Bailey in Whalley and The Plot in Newton.

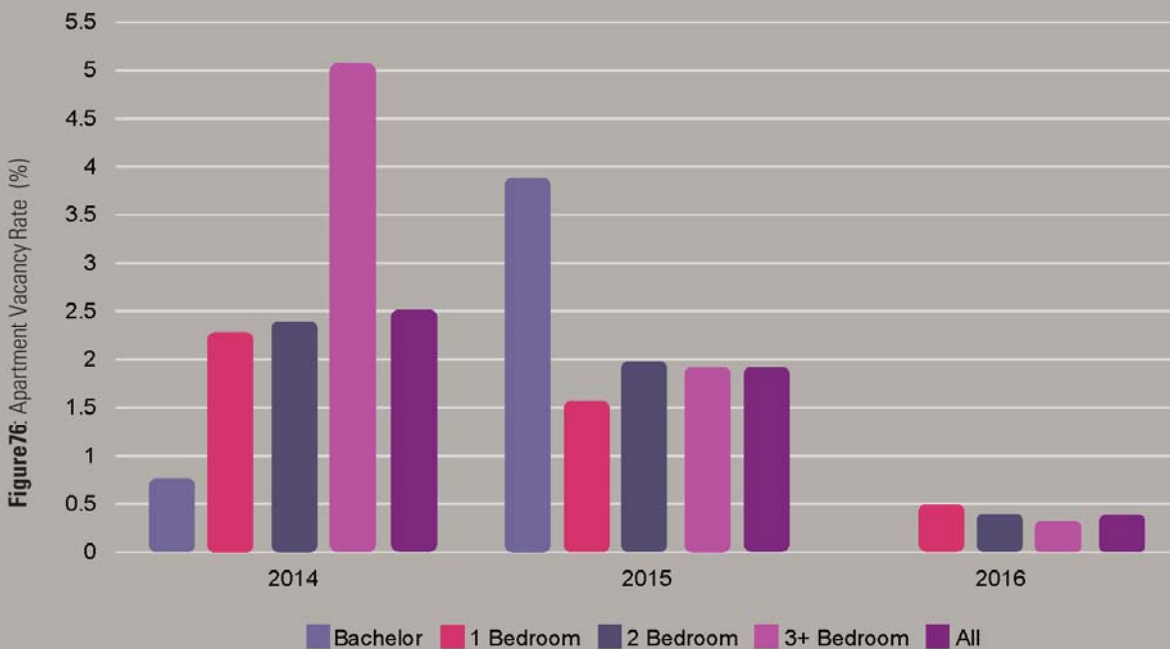


Vacancy Rates

The rental market remains very tight in the Lower Mainland as a whole with vacancy rates for purpose-built apartments declining to 0.7% from 0.8% last year.

Persistently low vacancy rates can be attributed to rising demand for rental units.

These market trends are also reflected in Surrey's vacancy rates. The vacancy rate for apartments has dropped significantly from the last two years, reaching 0.4% in 2016 (**Figure 76**).



Note: No data was available for Bachelor Units in 2016.

Liveability

An indicator used to determine the health and diversity of urban environments, particularly for residents of an area, is the number of homes that are within 400 m, or approximately a five minute walk, to amenities.

This is an important indicator as it illustrates the liveability of an urban environment and provides an understanding of how residents are able to engage and live within their neighbourhoods or communities without having to seek access to amenities, recreation services, health care or shopping elsewhere.

The Urban Amenities indicator (**Figure 77**) tracks the following amenities:

Parks—excludes greenbelts, utility Rights-of-Way, walkways, linear parks and detention ponds

Frequent Transit— includes Frequent Transit bus stops and Sky Train stations (800 m distance)

Bike routes— includes greenways

Retail—includes buildings classified as retail in Surrey’s population and employment growth models

Schools—includes both public and private elementary and secondary schools; and

Grocery stores—includes supermarkets and small-scale food stores but does not include gas stations and convenience stores .

All amenity indicators remained the same from 2015 to 2016 with the exception of grocery stores which dropped slightly. Access to bike routes is the best performing amenity indicator for Surrey at 92% with access to parks the second best performing indicator at 76%. As Surrey continues to grow and outpace construction of new school facilities in new neighbourhoods, this indicator is anticipated to remain low for the foreseeable future.

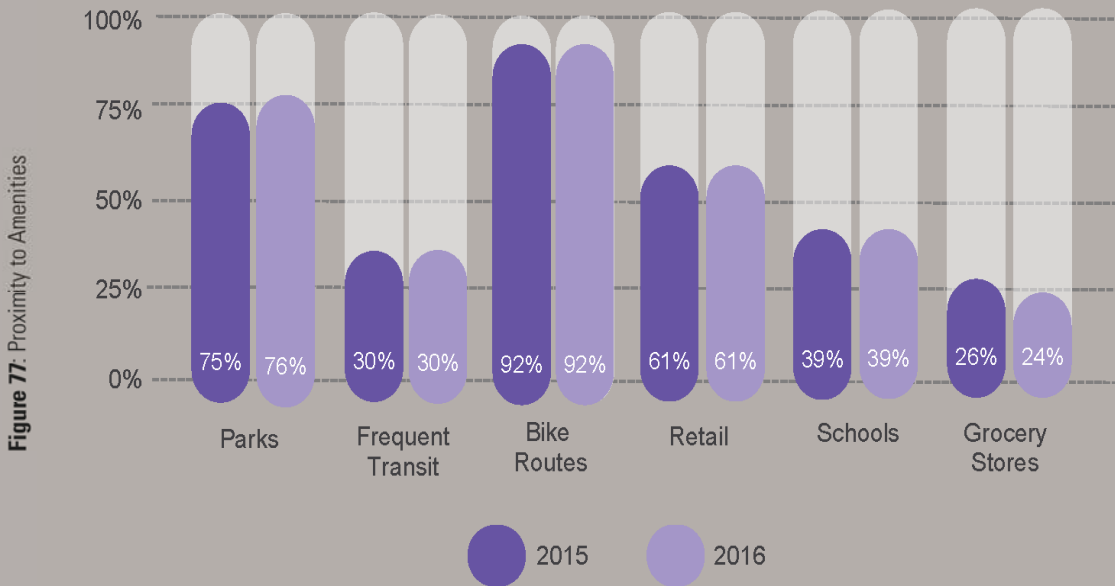


Figure 77. Proximity to Amenities



SOURCES

The Official Community Plan Performance Report uses data from the following sources:

Surrey Planning and Development Department, Community Planning Division
Surrey Planning and Development Department, Building Division
Census Canada
Canada Mortgage and Housing Corporation
Surrey School District
Surrey Department of Engineering, Transportation Division
Surrey Parks, Recreation and Culture Department
Surrey Sustainability Office
Ministry of Health
Metro Vancouver
British Columbia Assessment Authority





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Planning and Development Department
Community Planning Division