



CITY CENTRE AREA PLAN UPDATE

POPULATION GROWTH BACKGROUND PAPER

March 2019

Coquitlam

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INTRODUCTION

Purpose

The purpose of this report is to provide an overview of projected population growth to 2046 for the City Centre Area Plan (CCAP) Update. It combines information from a number of sources, including Census data, the City's Regional Context Statement (RCS) growth estimates, and development application and building permit data.

Summary

Growth estimates identified in the City's Regional Context Statement (RCS) from 2011 have been updated based on 2016 population figures, and the updated projections have been extended to 2046. Based on this update, City Centre is expected to add 24,000 new residents between 2016 and 2046, with the vast majority of growth to be concentrated in the CCAP Focus Area (Figure 1).

A review of the available data indicates that City Centre is currently lagging behind its RCS-estimated population growth, and that this shortfall is expected to widen during the next three years. An increase in construction activity could help City Centre meet future targets; however due to the existing shortfall, it is unlikely that City Centre will exceed the estimates, at least within the next decade.

SUMMARY

REPORT STRUCTURE

The report is divided into six sections.

Section 1 reviews the growth estimates identified in the RCS and summarizes the 2011-2016 five-year progress for Coquitlam and City Centre in light of 2016 Census data. A population shortfall of 1,500 was experienced for City Centre.

Section 2 presents the updated projections based on the 2016 Census. Coquitlam is expected to grow by 100,000 people by 2046. Of that growth, approximately 24,000 (24%) is anticipated to occur in City Centre.

Section 3 uses development data to estimate the anticipated City Centre population by the next Census in 2021. The existing RCS population shortfall is expected to widen to 4,450 by the year 2021.

Section 4 discusses the implications of an anticipated population shortfall by 2021. City Centre must add approximately 1,700 new residents each year after 2021 to reach the original RCS target for 2031.

Section 5 identifies low, medium and high growth scenarios for the remainder of the plan horizon (2021 to 2046). The scenarios are based on information from previous sections. The Medium Growth scenario approximately matches the RCS growth estimates.

Section 6 summarizes the report's findings and discusses next steps. As noted, City Centre is currently not meeting its RCS population growth estimates. A possible increase in construction activity could help to bring growth back in line with the original estimated level of growth.

CITY CENTRE: 2046 POPULATION

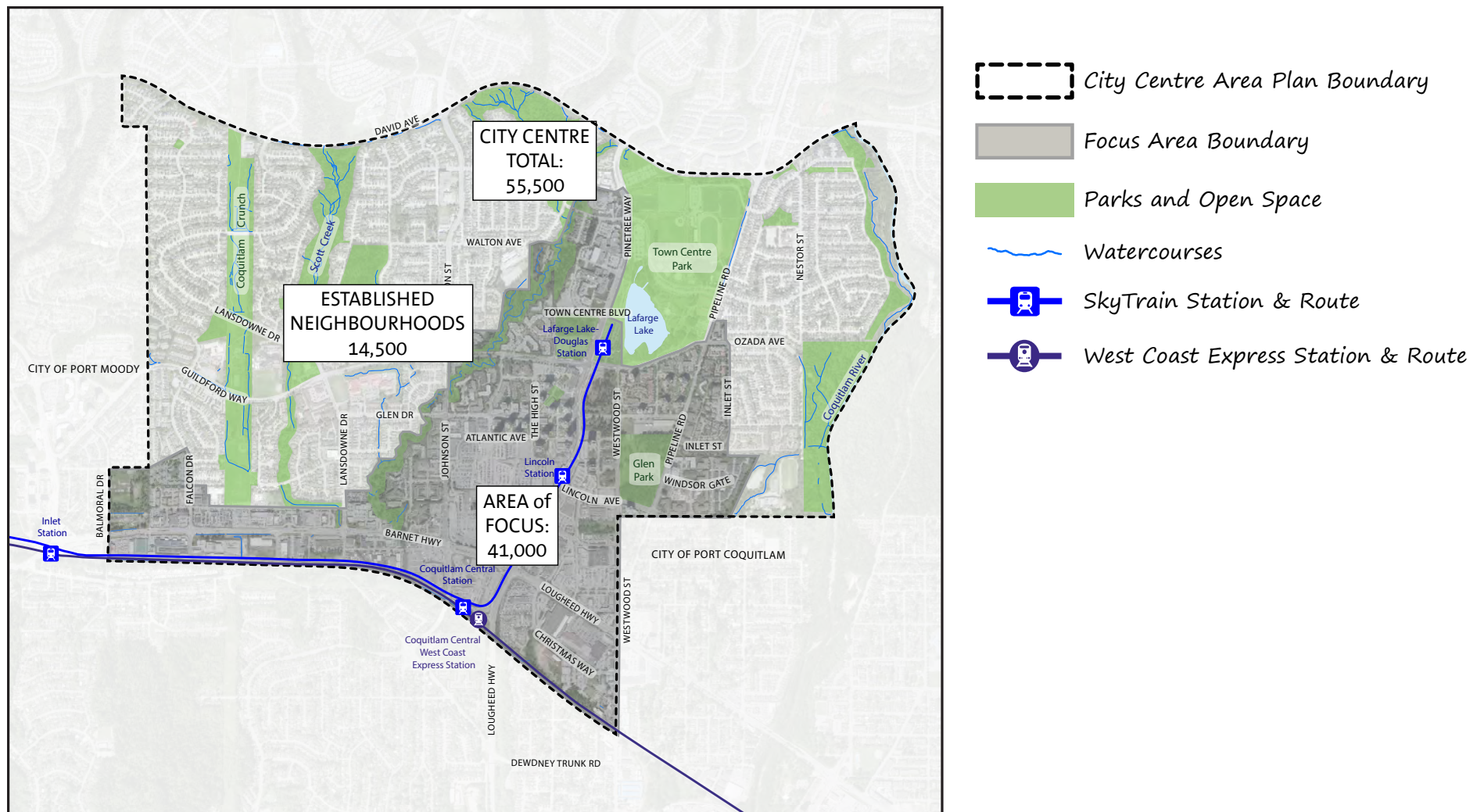


Figure 1: City Centre Area Plan 2046 Population

1. REGIONAL CONTEXT STATEMENT: GROWTH ESTIMATES

METRO VANCOUVER PROJECTIONS: 2011 TO 2041

Population Projections

Population projections measure the future size and composition of a population. Demographers review trends and make assumptions about demographic and economic circumstances, such as fertility, mortality, migration and employment growth. The current research is based on regional projections prepared by Metro Vancouver.

Regional Growth Strategy Projections

As a part of its regional planning responsibilities, Metro Vancouver conducts long-range population modelling and assigns estimates to each member municipality. The Regional Growth Strategy (RGS), titled *Metro Vancouver 2040: Shaping Our Future*, was adopted in 2011. To support the goals of the Regional Growth Strategy, the majority of growth is planned to be accommodated in existing urban areas, with the highest intensity of growth directed to urban centres.

Regional Context Statement Growth Estimates

The City of Coquitlam distributed its projected population growth among different neighbourhoods as part of the City's Regional Context Statement (RCS). As shown in Table 1, 47% of growth was assigned to the City's urban centres, including 29% to the City Centre. The locations and boundaries of Coquitlam's various growth areas is shown in Figure 5.

For the purpose of tracking RCS Growth Estimates, "City Centre" is defined as an area that coincides with the CCAP Focus Area, and excludes surrounding stable areas.

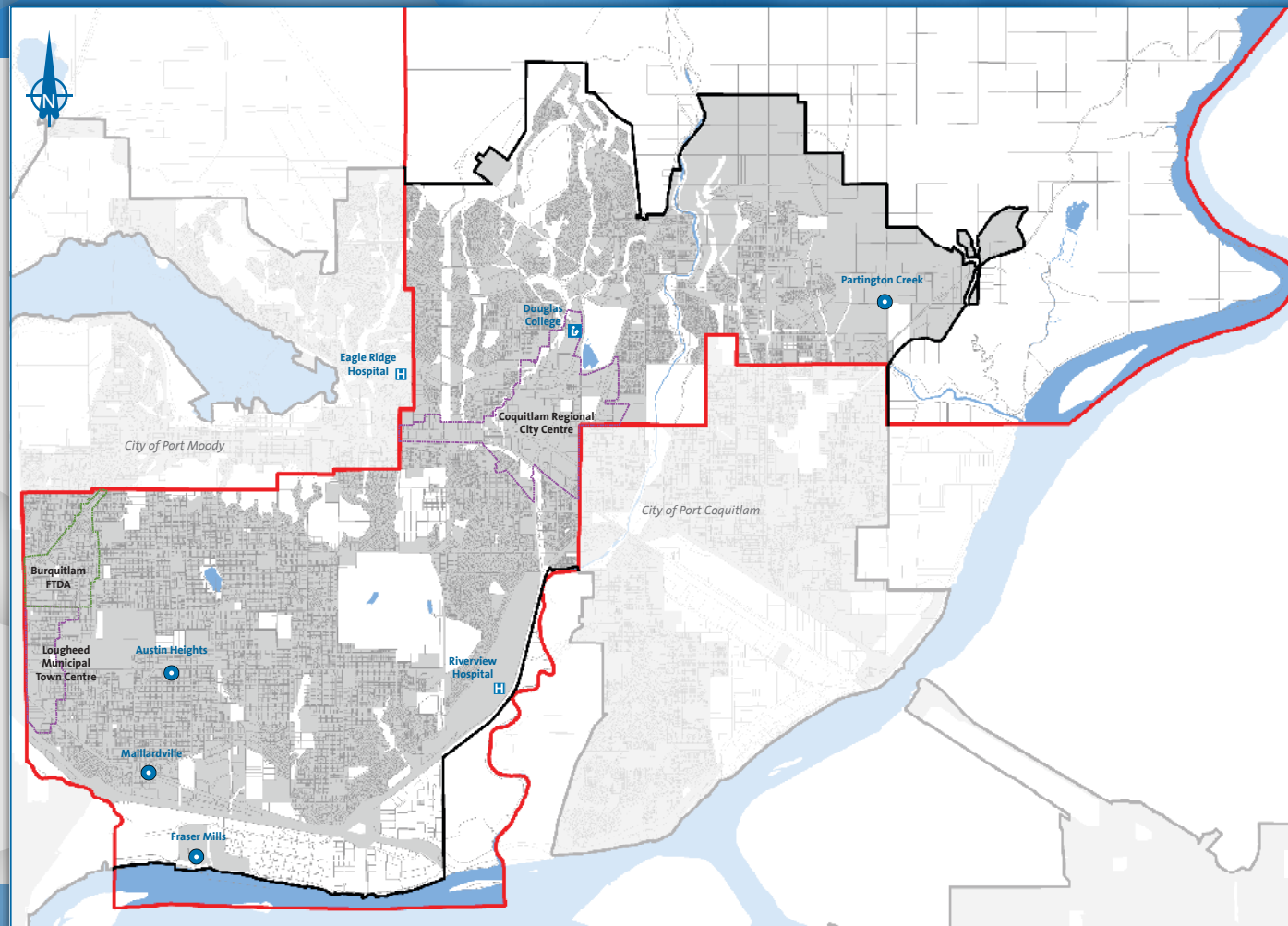
Population	Census		Target		Target		Target		Projected Growth	
	2011		2021		2031		2041		2011-2041	
	#	%	#	%	#	%	#	%	#	%
Coquitlam Total	131,500	100%	176,000	100%	213,000	100%	224,000	100%	92,500	100%
Urban Centres Total	28,800	22%	48,100	27%	64,900	30%	72,000	32%	43,200	47%
City Centre	12,900	10%	24,300	14%	37,100	17%	40,100	18%	27,200	29%
Burquitlam-Lougheed	16,400	12%	23,800	14%	27,800	13%	31,900	14%	20,400	22%
All Other Areas	102,700	78%	127,900	73%	148,000	69%	152,000	68%	49,300	53%

Table 1: Population growth estimates based on the Regional Context Statement. Figures have been adjusted to reflect the current Focus Area boundary and other necessary data adjustments.

1. REGIONAL CONTEXT STATEMENT: GROWTH ESTIMATES

CITY OF COQUITLAM - URBAN AND LOCAL CENTRES

SCHEDULE "B" to bylaw 4421, 2013



SCHEDULE B
Urban and Local Centres

LEGEND

- City of Coquitlam Boundary
- Urban Containment Boundary
- Water Bodies
- General Urban
- Urban Centres
- Frequent Transit Development Area
- Local Centres
- Post Secondary
- Hospital

0 500 1,000 2,000 3,000
Metres

***Disclaimer**
The City does not guarantee or warrant the reliability, accuracy, quality, currency, validity or completeness of the information presented. This information is provided for information and convenience purposes only.

Date Created: September 20, 2012
Prepared by: Coquitlam Community Planning Division
Source: Regional Growth Strategy - Bylaw No. 1136, 2010
Greater Vancouver Regional District
(Metro Vancouver)

Coquitlam

Figure 5: The Urban Centres, Frequent Transit Development Areas and Local Centres as defined in Schedule B of the Regional Context Statement under Part 1 of the CWOP.

1. REGIONAL CONTEXT STATEMENT: GROWTH ESTIMATES

RCS GROWTH ESTIMATES

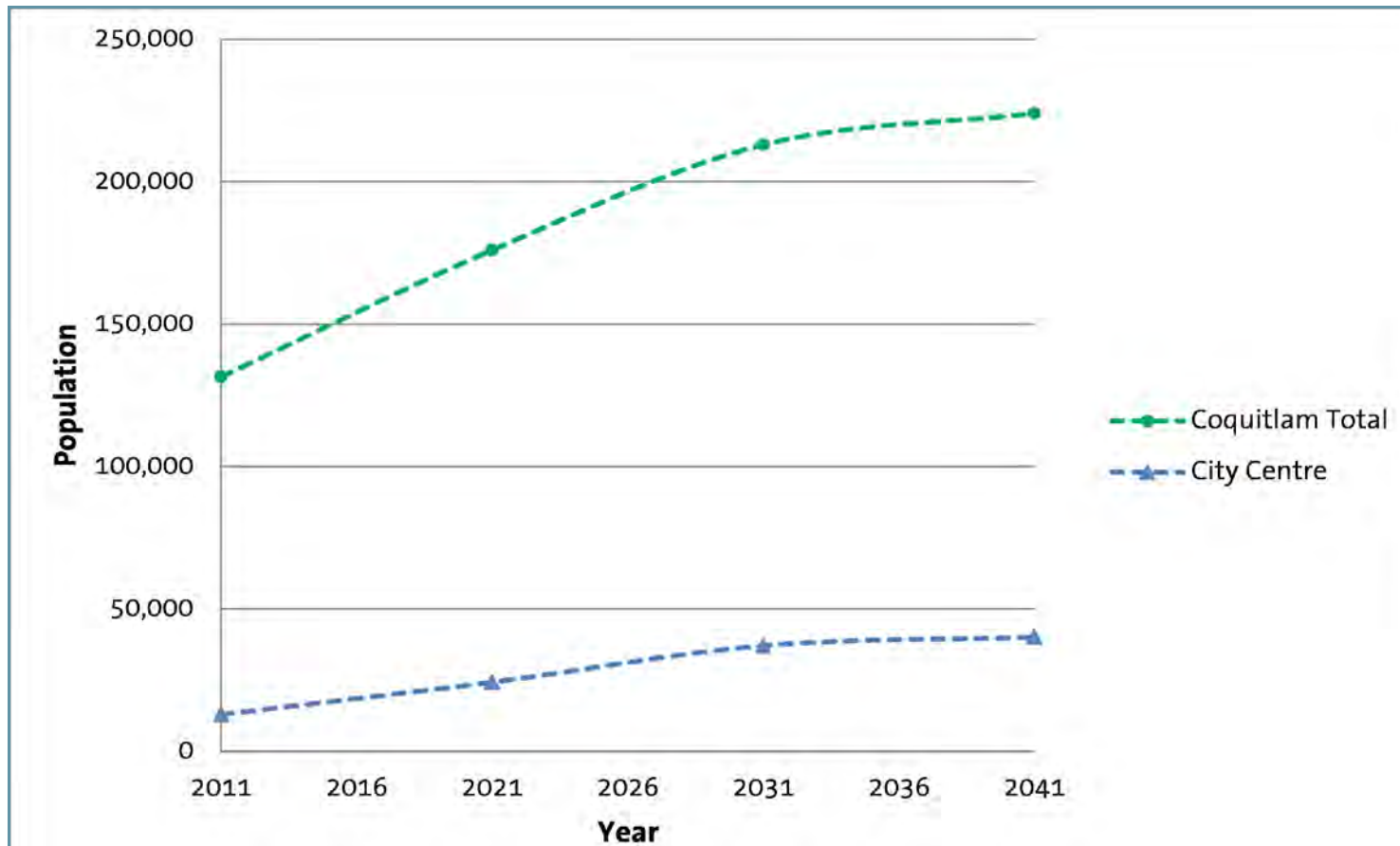


Figure 2: RCS population growth estimates for Coquitlam and City Centre

Rate Change Over Time

The 30-year population estimates for Coquitlam Citywide Total and for City Centre identified in Table 1 are shown in graph form in Figure 2. As the graph shows, the estimates assume more rapid growth during the first two decades, followed by slower growth during the last decade. Regionally, Metro Vancouver has forecast slower growth resulting from long-term demographic trends. This regional pattern is reflected in each of Coquitlam's estimates.

1. REGIONAL CONTEXT STATEMENT: GROWTH ESTIMATES

FIVE-YEAR PROGRESS: 2011 TO 2016

A comparison between Census data from 2011 to 2016 is shown in Table 2 and Figures 3 & 4. During that five-year period, Coquitlam grew by 11,000 people, with 4,165 of those people moving to the City Centre. As shown in Table 2, all of the growth in City Centre occurred within the boundaries of the Focus Area, reflecting the stable nature of neighbourhoods outside the Focus Area.

Figures 3 & 4 show compare estimated growth to the actual growth experienced between 2011 and 2016 based on Census data. Growth during the first five years was slower than anticipated. Citywide, only 49% of the estimated growth was achieved, a shortfall of approximately 11,250 people. The City Centre performed somewhat better at 92% of the estimate, a shortfall of approximately 1,500 people (Figures 3 & 4).

Census Year	Coquitlam	Total CCAP	Focus Area
2011	131,500	27,215	12,900
2016	142,500	31,380	17,065
Growth	11,000	4,165	4,165

Table 2: City Centre population statistics

1. REGIONAL CONTEXT STATEMENT: GROWTH ESTIMATES

RCS AND CENSUS GROWTH COMPARISON: COQUITLAM CITYWIDE

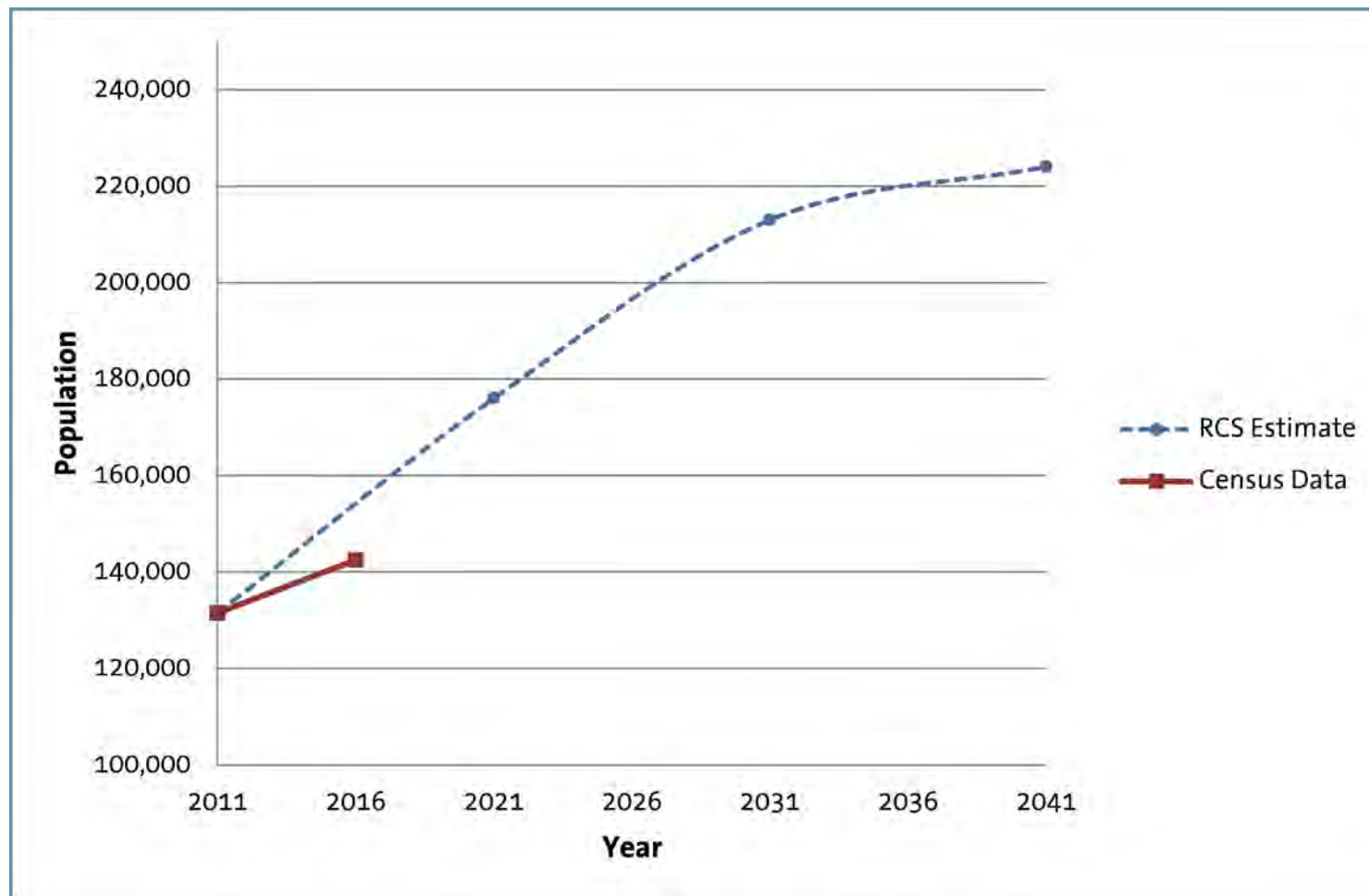


Figure 3: Citywide 5-year population growth compared to RCS estimates

Population Growth Comparison

The 2016 RCS target population is 153,750 (assumed to be the mid-point between the 2011 population and the first Target Year estimate for 2021, as shown in Table 1). The 2016 Census population was 142,500, resulting in a difference of 11,250.

1. REGIONAL CONTEXT STATEMENT: GROWTH ESTIMATES

RCS AND CENSUS GROWTH COMPARISON: CITY CENTRE (AREA OF FOCUS)

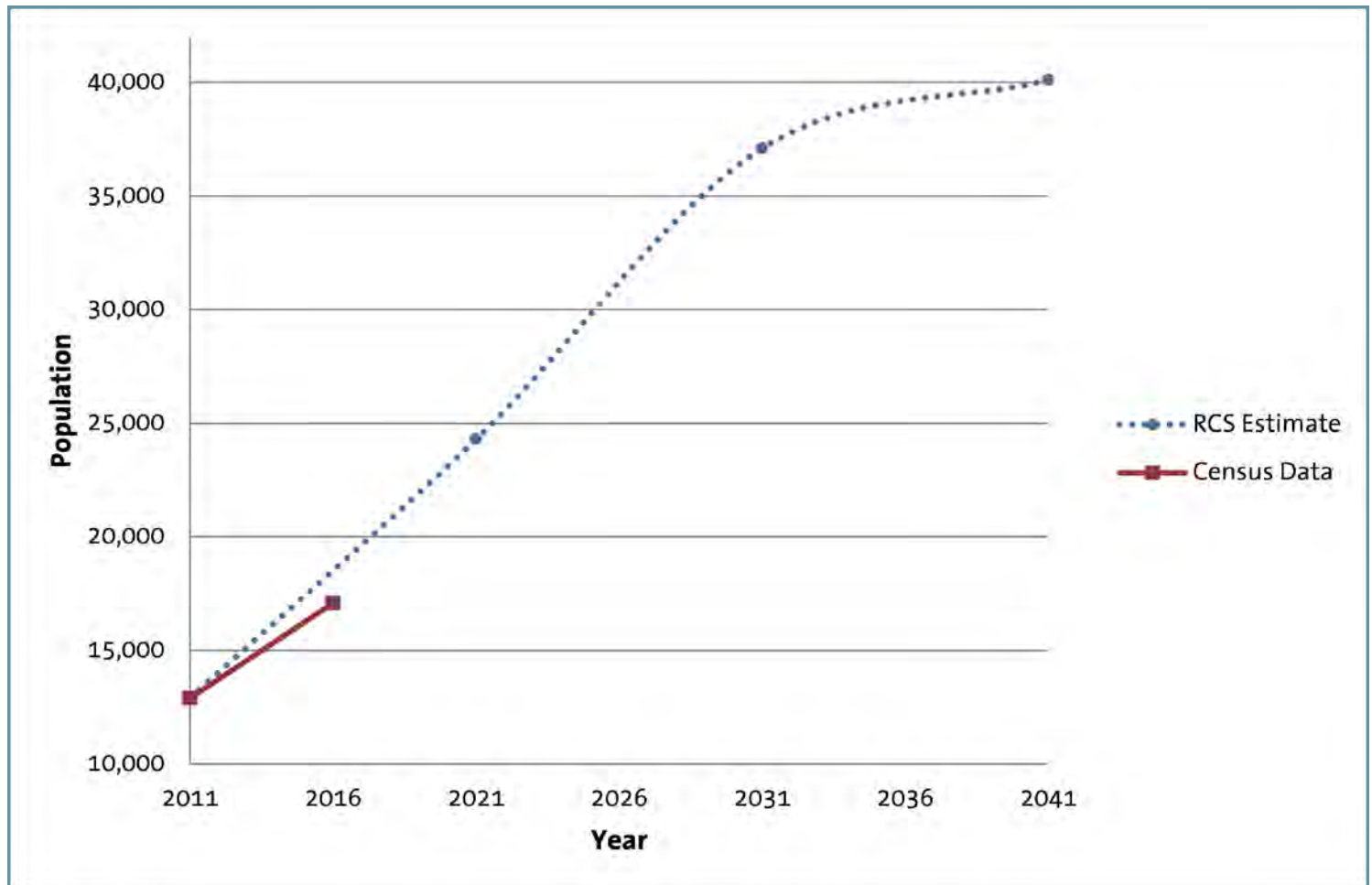


Figure 4: City Centre 5-year population growth compared to RCS estimates

Population Growth Comparison

The 2016 RCS target population is 18,600 (assumed to be the mid-point between the 2011 population and the first Target Year estimate for 2021, as shown in Table 1). The 2016 Census population was 17,065, resulting in a difference of 1,535.

2. GROWTH PROJECTION SUMMARY

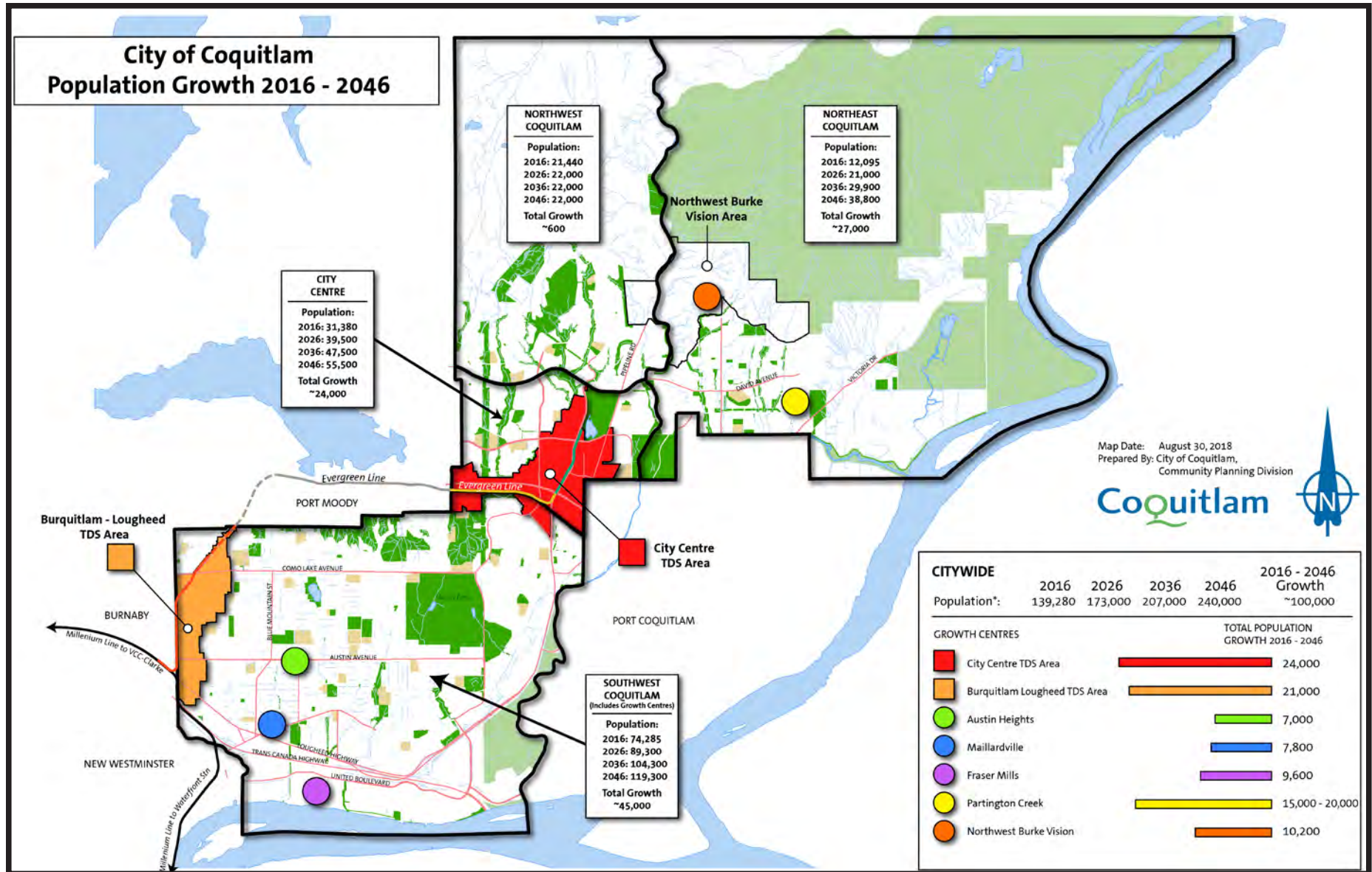


Figure 6: Citywide distribution of growth

2. GROWTH PROJECTION SUMMARY

30-YEAR GROWTH PROJECTION

The population of City Centre is anticipated to grow by approximately 24,000 from 2016 to 2046.

Population Growth: 2016 to 2046

The City of Coquitlam distributes population growth among a number of areas. Nearly half of growth has been assigned to the City’s urban centres, namely, City Centre and the Burquitlam-Lougheed neighbourhood (Figure 6). The remainder of growth is shared among neighbourhood centres and Northeast Coquitlam (Burke Mountain). The population of City Centre is anticipated to grow by approximately 24,000 people from 2016 to 2046.

It is anticipated that the vast majority of growth in City Centre will be contained within the CCAP Focus Area. The lands outside the Focus Area comprise established neighbourhoods that are not anticipated to experience significant additional growth over this time period (Figure 6).

2041 Versus 2046: What’s The Difference?

Coquitlam’s growth estimates were established in the City’s Regional Context Statement for the 30-year period between 2011 and 2041, using the 2011 Census as the base year. Targets were set at 10-year intervals: 2021, 2031 & 2041.

For planning purposes, the City of Coquitlam uses 2016 data, now available from the 2016 Census, to look ahead 30 years to 2046. The growth rates established by Metro Vancouver and refined in the Regional Context Statement are extrapolated to account for the additional five years to 2046.

	2016	Growth	2046
CCAP Total	31,380	~24,000	55,500
Focus Area	17,065		41,000

Table 3: Population change from 2016 to 2046

3. GROWTH ESTIMATE: 2016 to 2021

SHORT-TERM GROWTH ESTIMATE

Method Overview

Development data is used to calculate the expected number of new dwelling units to be completed during the five-year period from 2016 to 2021. The next Census will be conducted in Spring 2021 which is a little more than two years away from the time of writing. Nearly all projects likely to be completed and occupied by that time are already under construction, with one project that has obtained Council approval and is at the building permit review stage. Based on past review and construction time lines, it is not anticipated that any development applications currently under review that have not yet obtained Council approval could be built and occupied by the time of the 2021 Census. Population is estimated based on Coquitlam’s average household sizes for apartments and townhouses, as these are the two types of units being constructed within City Centre. Population estimates assume 100% occupancy.

Estimated population growth from 2016 to 2021 is 2,730 people. This is lower than the previous 5-year period (4,165 people).

Results

Table 4 shows units that have obtained occupancy after May 2016 or are expected to be completed by Spring 2021 and estimated population. The population of the CCAP Focus Area is estimated to grow from 17,065 in 2016 to approximately 19,800 by 2021 (+ 2,730 people). This level of growth is lower than the previous five-year period (+ 4,165 people) as noted in Table 2. Compared to the RGS estimate for 2021 of 24,300, it represents a shortfall of 4,500 (Figure 7).

Anticipated Building Completions: 2016 to 2021			
Stage	Est. Occupancy	Units	Est. Population
Completed May 2016-February 2019	n/a	557	1,115
Under Construction	2019	490	1,070
Building Permit Review	2021	273	545
Total		1,320	2,730

Table 4: Development data to 2021, see Appendix on p.11 for details



2016 AVERAGE HOUSEHOLD SIZE:

Apartment = 2.0 pph
Townhouse = 2.9 pph

3. GROWTH ESTIMATE: 2016 to 2021

RCS AND SHORT-TERM ESTIMATE COMPARISON: CITY CENTRE (AREA OF FOCUS)

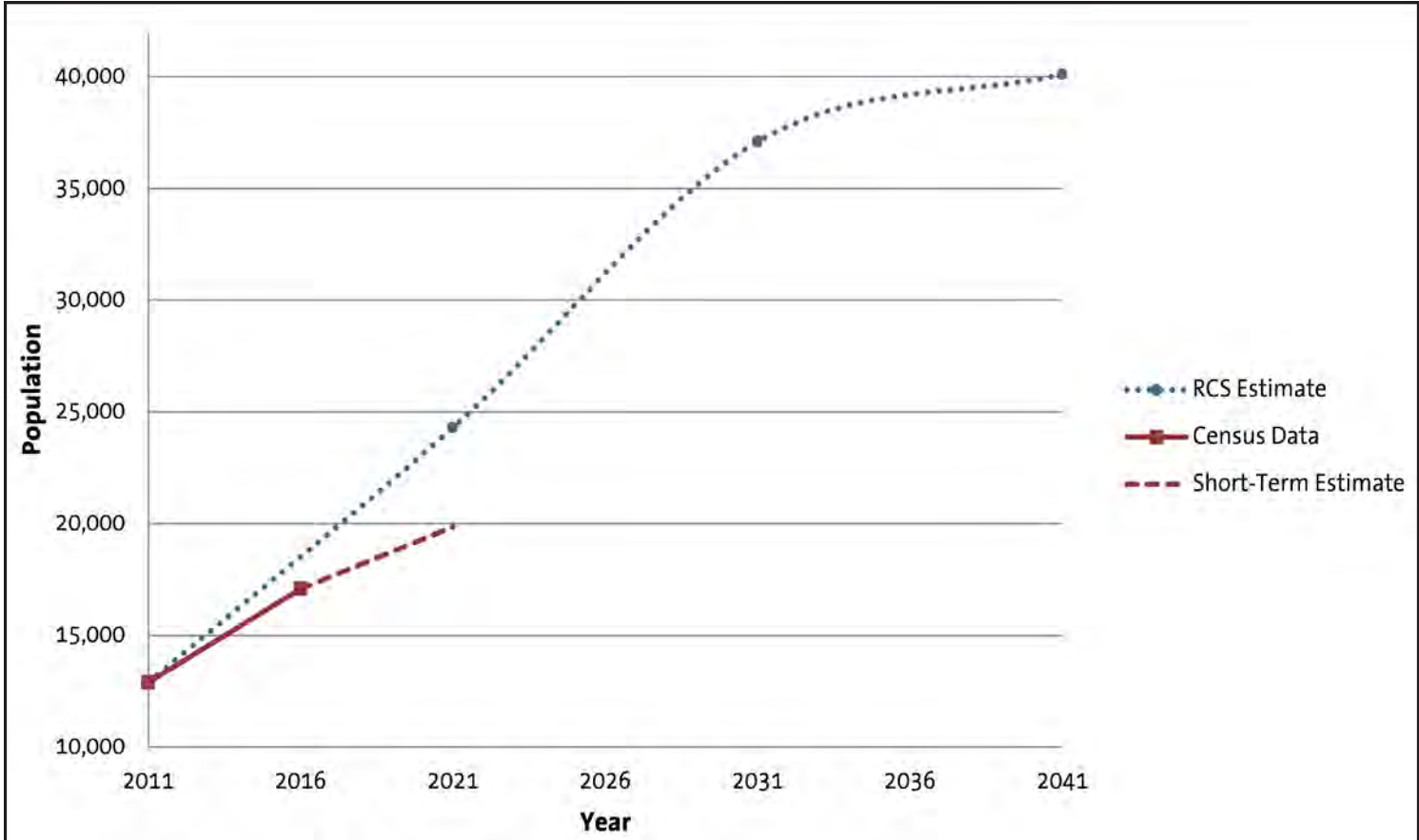
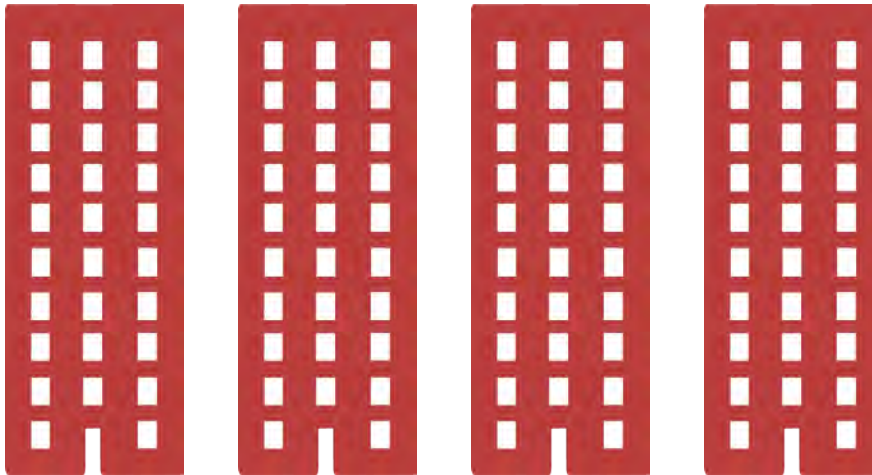


Figure 8: City Centre estimated population growth to 2021

4. GETTING BACK ON TARGET: 2031

REACHING THE RCS ESTIMATES BY 2031

The projected 2021 RCS population shortfall will be approximately 4,500 people. In order to make up this shortfall by 2031, the rate of growth in City Centre must increase significantly. This means approximately 17,000 new residents would need to be added from 2021 to 2031. By comparison, it is expected the period from 2011 to 2021, once complete, will have added approximately 7,000 residents. Growth will need to be nearly 2.5 times greater during the next decade, from 2021 to 2031, than it has been during the current decade.



*Growth needed during 2021-2031 to
meet the 2031 City Centre RCS estimate:*

Population: 1,700/year

Units: 850/year

Possible Construction: 3 to 4 towers/year

4. GETTING BACK ON TARGET: 2031

CURRENT DEVELOPMENT PROPOSALS

A number of multi-tower development applications are currently under review. None are approved at this time, however they have the potential to add several thousand units to City Centre. These proposals are taking advantage of new affordable housing density incentives. Mixed-use commercial and residential high-rise developments have been proposed with densities of 6.5 FAR and greater under proposed CD zones based on the C-4 “City Centre Commercial” zone. Collectively, these projects, plus similar future projects, could help to facilitate the level of growth needed to recover the existing shortfall.

Larger projects, particularly those that include multiple high-rise towers, are typically constructed in phases. The exact pace of construction is variable; however these types of large projects are expected to take several years to complete. For example, the Windsor Gate development (shown below) includes 1,450 units in four high-rise towers and several low-rise and townhouse buildings. The project was originally approved in 2007 and the final phases, currently under construction, are expected to be completed this year (2019), meaning that this project took 12 years to complete all of its phases.



Windsor Gate final phases under construction as of Summer 2018.

5. GROWTH SCENARIOS: 2021 to 2046

GROWTH SCENARIOS

Overview

The previous section used development data to estimate growth from 2016 to 2021. Beyond this short time line, a different method must be used. This section draws on the information from the previous sections to generate a series of assumptions about growth beyond 2021. Three growth scenarios are presented. Each scenario applies a different set of assumptions. Together, the scenarios provide a range of possible futures (low, medium and high growth). Figure 9 compares the scenarios to the RCS estimates.

Key Considerations:

- Population growth in City Centre since 2011 is below the RCS estimates. Higher growth is needed to meet future estimates.
- A number of large multi-tower projects are currently under review which could add several thousand units beyond 2021.
- Multi-tower projects are delivered in phases over several years; the exact pace of construction is variable.
- Metro Vancouver anticipates the regional rate of growth beyond 2031 to begin to slow.

LOW	Approximate Annual Growth		
Period	Population	Units	Possible Construction
2021-2031	800-850	400-425	1+ high-rise
2031-2046	300	150	1 high-rise/2 years
2016 to 2046 Growth		15,500	
2046	CCAP	47,000	
Population	Focus Area	32,500	

Table 5: Low growth scenario statistics

Low Growth

The Low Growth scenario assumes that growth during 2021 to 2031 will match the average rate from 2011 to 2021. Approximately one high-rise tower is constructed each year. After 2031, growth slows to match the slower rate of growth anticipated in the RCS for the final decade.

5. GROWTH SCENARIOS: 2021 to 2046

MEDIUM	Approximate Annual Growth		
Period	Population	Units	Possible Construction
2021-2031	1650-1700	825-850	3-4 high-rises
2031-2046	300	150	1 high-rise/2 years
2016 to 2046 Growth		24,000	
2046 Population	CCAP	55,500	
	Focus Area	41,000	

Table 6: Medium growth scenario statistics

Medium Growth

The Medium Growth scenario assumes a rapid growth rate for 2021 to 2031, following the adoption of the updated CCAP; by 2031, the population has nearly caught up to the RCS estimate. Several high-rise towers are constructed each year. Like the Low Growth Scenario, after 2031, growth slows to match the slower rate of growth anticipated in the RCS for the final decade.

The medium growth scenario represents the closest match to the RCS Estimates.

HIGH	Approximate Annual Growth		
Period	Population	Units	Possible Construction
2021-2031	1650-1700	825-850	3-4 high-rises
2031-2046	600	300	1 high-rise
2016 to 2046 Growth		29,000	
2046 Population	CCAP	60,500	
	Focus Area	46,000	

Table 7: High growth scenario statistics

High Growth

The High Growth scenario follows the same growth rate for 2021 to 2031 as the Medium Growth scenario. It differs from the Medium Growth scenario after 2031: growth slows slightly but remains high compared to the slower rate of growth anticipated in the RCS for the final decade.

5. GROWTH SCENARIOS: 2021 to 2046

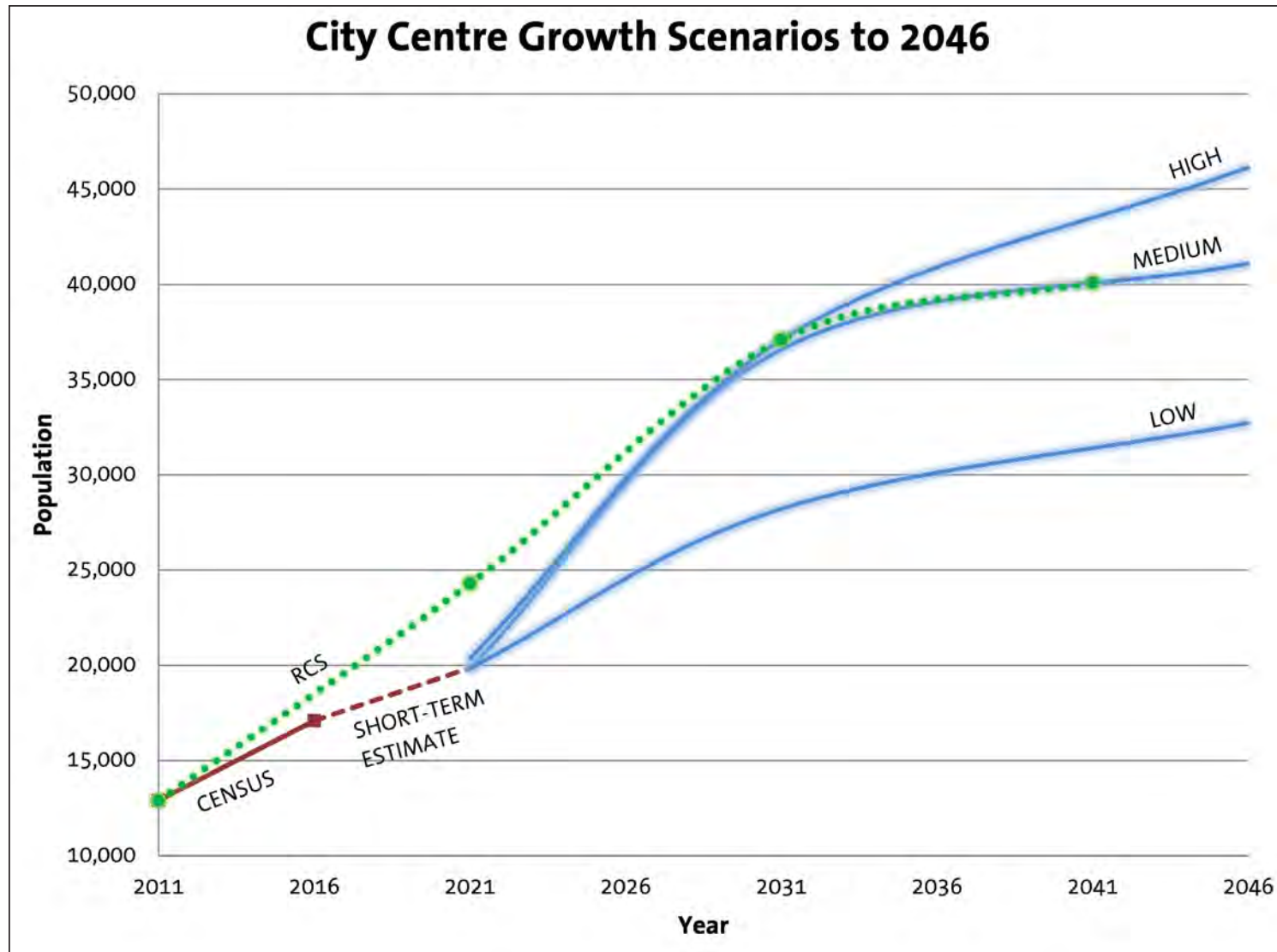


Figure 11: Comparison of Low, Medium and High growth scenarios to RCS estimates for the City Centre (Focus Area population shown)

5. GROWTH SCENARIOS: 2021 to 2046



6. CONCLUSION

SUMMARY

City Centre is expected to add approximately 24,000 new residents by 2046, the vast majority of which will be concentrated in the CCAP Area of Focus. This expectation is based on growth estimates identified in the City's Regional Context Statement, which are derived from Metro Vancouver's population projections.

The population change experienced from 2011 to 2016 was less than anticipated based on the RCS estimate. This shortfall is expected to widen by 2021. A possible increase in construction activity beyond 2021 could help to bring population growth back on target.

This document was prepared in support of the CCAP Residential Density & Land Use Transition Report by providing detailed analysis of City Centre's projected rate of residential growth over the next three decades. The expected level of growth, 24,000 new residents by 2046, assumes that an increase in construction activity will occur relative to what has been experienced in recent years. In this context, new development proposals in City Centre are expected to contribute to, and not exceed, the originally anticipated rate of growth, at least in the short to medium term.

CITY CENTRE: 2046 POPULATION

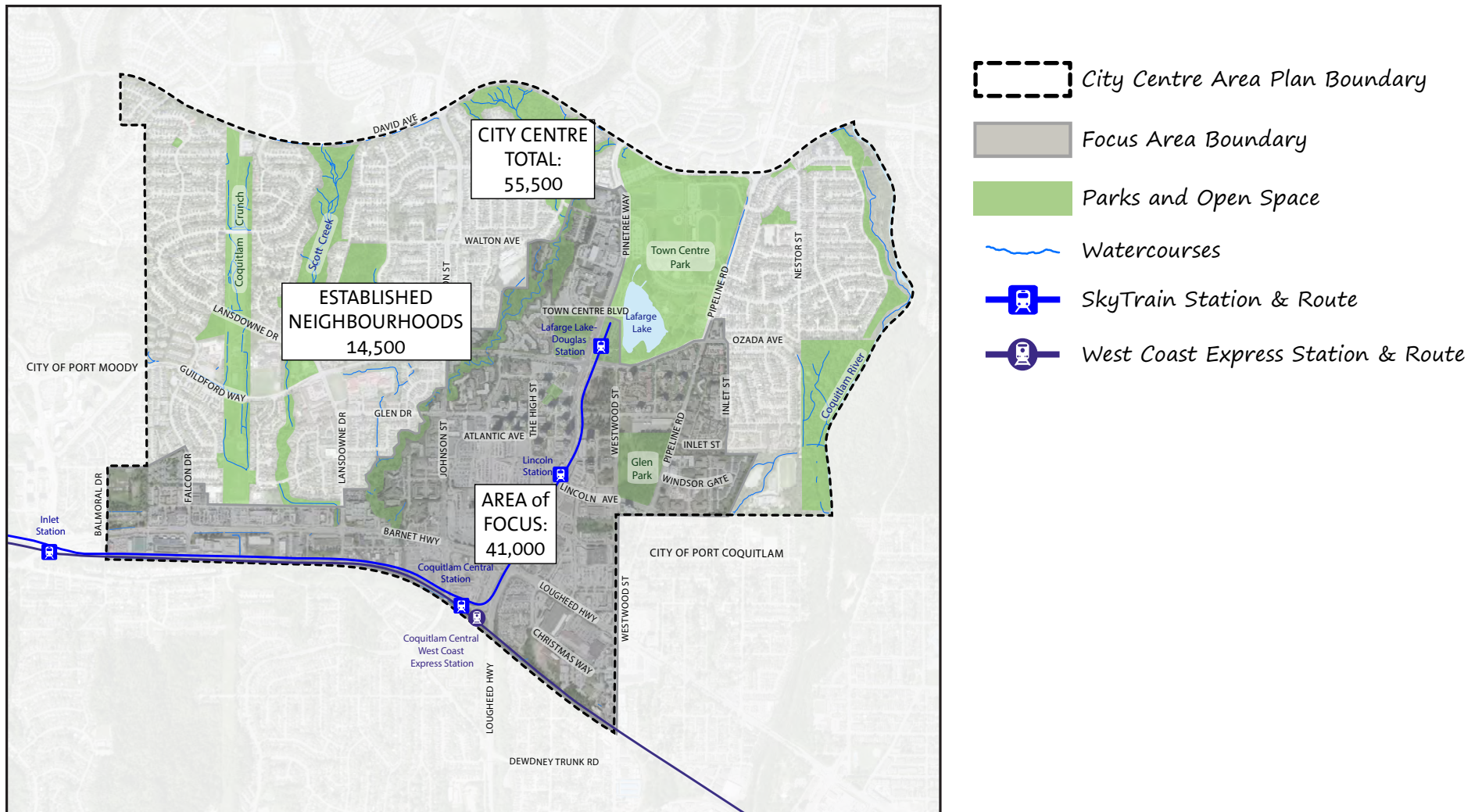


Figure 1: City Centre Area Plan 2046 Population

