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BC Building Industry Survey Results: Energy & Emissions Requirements

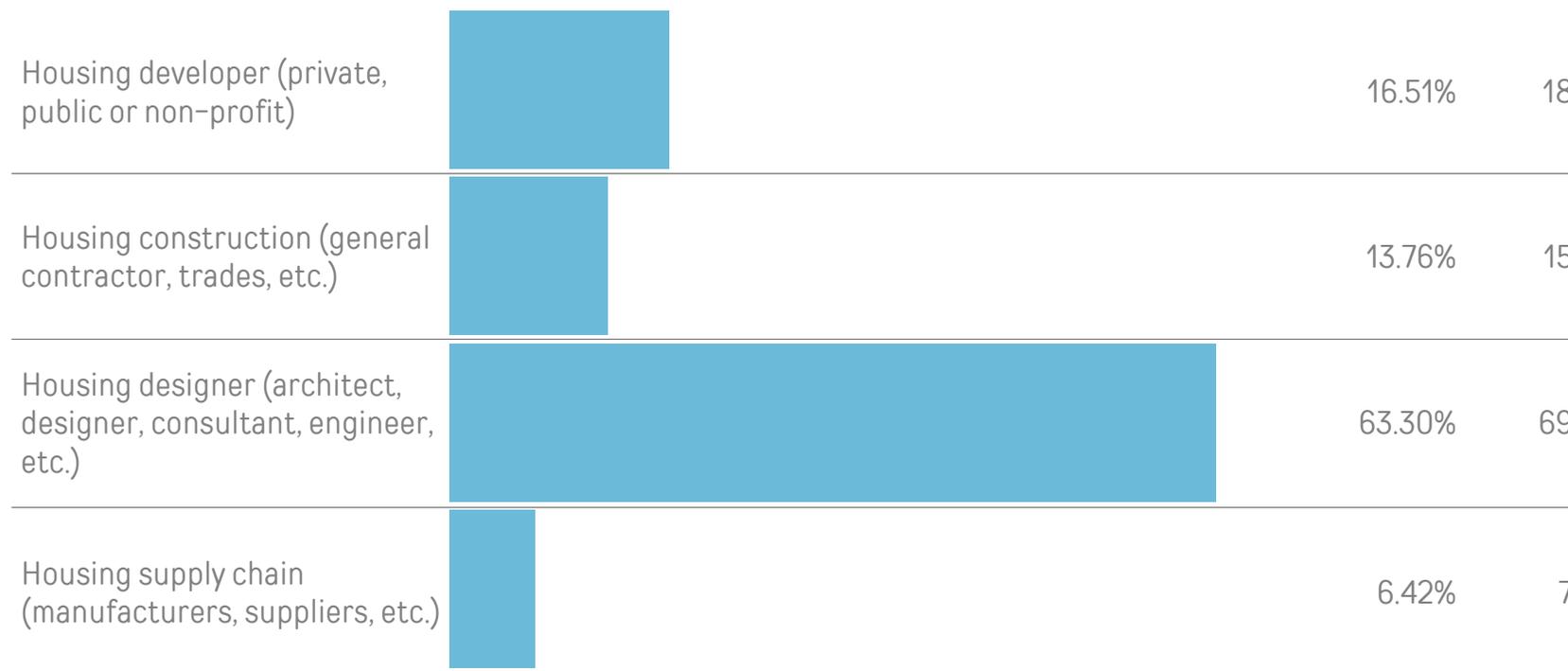
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ZERO EMISSIONS INNOVATION CENTRE

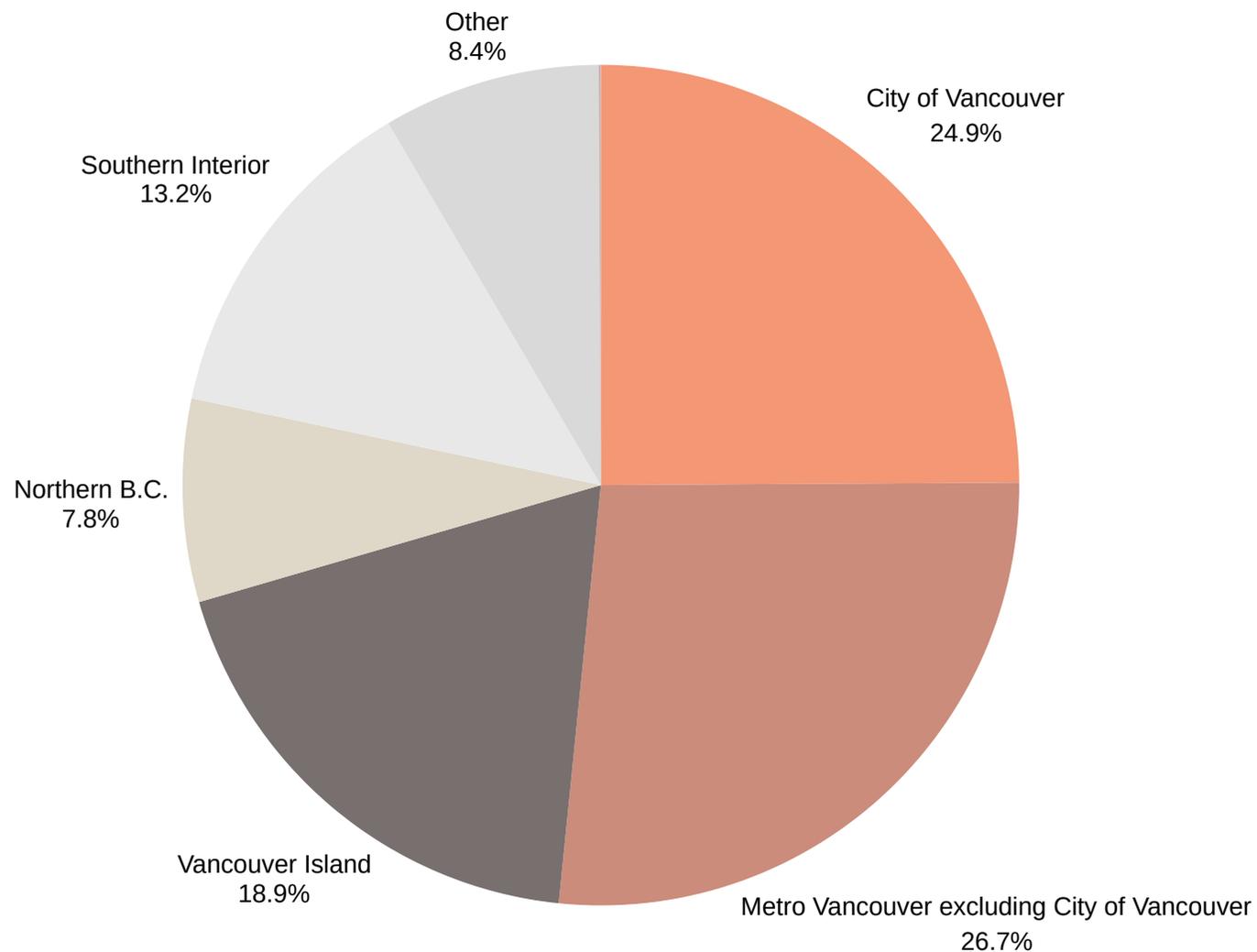
MORE SOLUTIONS, LESS CARBON.

Q1: Which of the following categories best describes your organization?

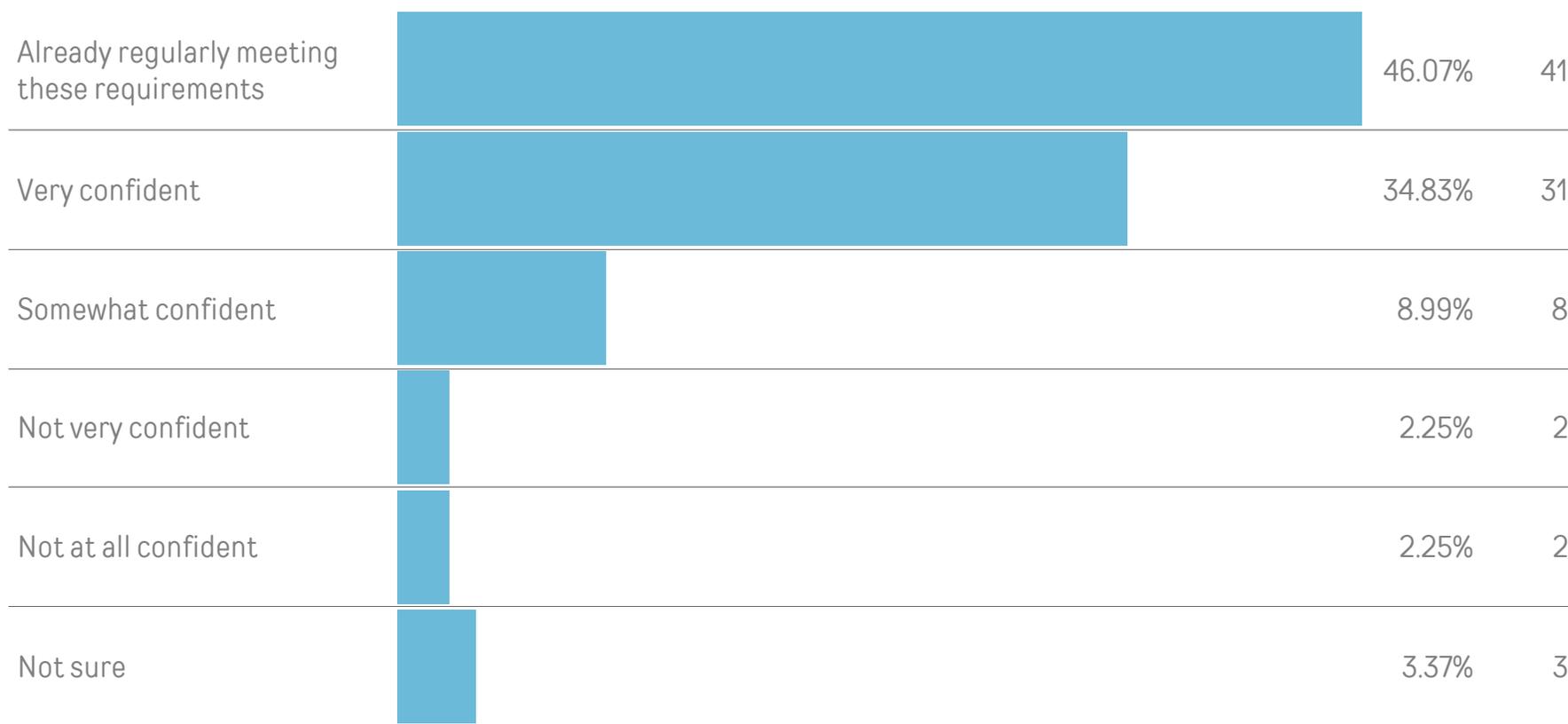


Q2: Where are most of your projects located? (Select all that apply)

| | |
|---|----|
| City of Vancouver | 83 |
| Metro Vancouver excluding City of Vancouver | 89 |
| Vancouver Island | 63 |
| Northern B.C. | 26 |
| Southern Interior | 44 |
| Other | 28 |

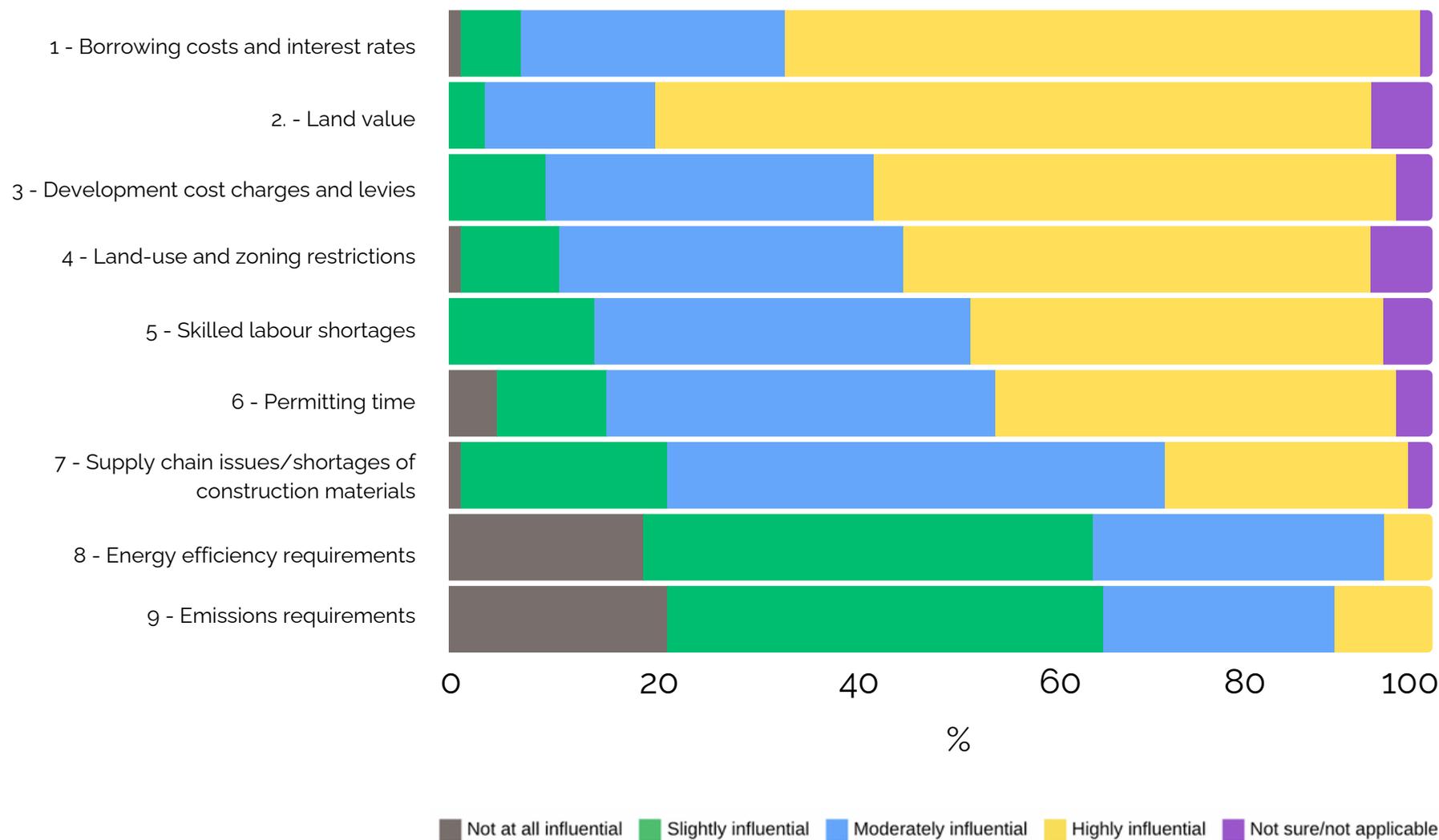


Q3: In May 2023, the Government of BC provided local governments with a voluntary carbon standard (Zero Carbon Step Code) to reduce emissions from new buildings and it has signaled an intent to require all new buildings to be zero carbon by 2030. How confident are you that your firm or organization will be ready to meet these requirements by 2030?



Requirements not applicable to my organization: 2.25% (2)

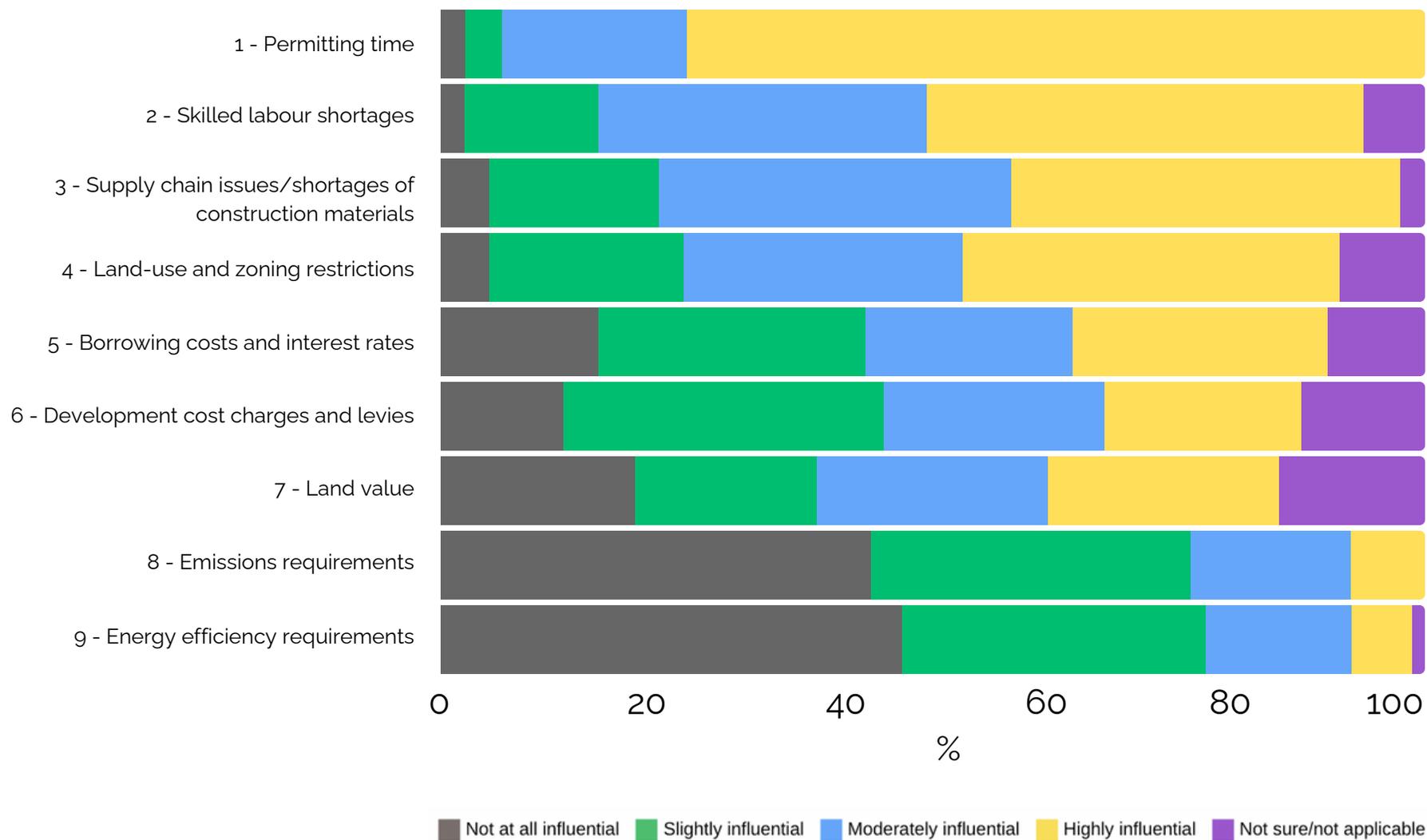
Q4: In your opinion, to what degree do the below factors influence the increasing costs of new housing development in B.C.?



Q4: In your opinion, to what degree do the below factors influence the increasing costs of new housing development in B.C.?

| | Not at all influential | | Slightly influential | | Moderately influential | | Highly influential | | Not sure/not applicable | | Total | Weighted Average |
|--|------------------------|----|----------------------|----|------------------------|----|--------------------|----|-------------------------|---|-------|------------------|
| 1 - Borrowing costs and interest rates | 1.12% | 1 | 6.74% | 6 | 26.97% | 24 | 64.04% | 57 | 1.12% | 1 | 89 | 3.52 |
| 2 - Land value | 0.00% | 0 | 4.55% | 4 | 17.05% | 15 | 72.73% | 64 | 5.68% | 5 | 88 | 3.51 |
| 3 - Development cost charges and levies | 0.00% | 0 | 11.36% | 10 | 31.82% | 28 | 53.41% | 47 | 3.41% | 3 | 88 | 3.32 |
| 4 - Land-use and zoning restrictions | 1.15% | 1 | 10.34% | 9 | 34.48% | 30 | 48.28% | 42 | 5.75% | 5 | 87 | 3.18 |
| 5 - Skilled labour shortages | 0.00% | 0 | 13.64% | 12 | 38.64% | 34 | 43.18% | 38 | 4.55% | 4 | 88 | 3.16 |
| 6 - Permitting time | 4.55% | 4 | 12.50% | 11 | 39.77% | 35 | 39.77% | 35 | 3.41% | 3 | 88 | 3.08 |
| 7 - Supply chain issues/shortages of construction materials | 1.14% | 1 | 21.59% | 19 | 48.86% | 43 | 26.14% | 23 | 2.27% | 2 | 88 | 2.95 |
| 8 - Energy efficiency requirements | 21.59% | 19 | 43.18% | 38 | 29.55% | 26 | 5.68% | 5 | 0.00% | 0 | 88 | 2.19 |
| 9 - Emissions requirements | 23.86% | 21 | 44.32% | 39 | 21.59% | 19 | 10.23% | 9 | 0.00% | 0 | 88 | 2.18 |

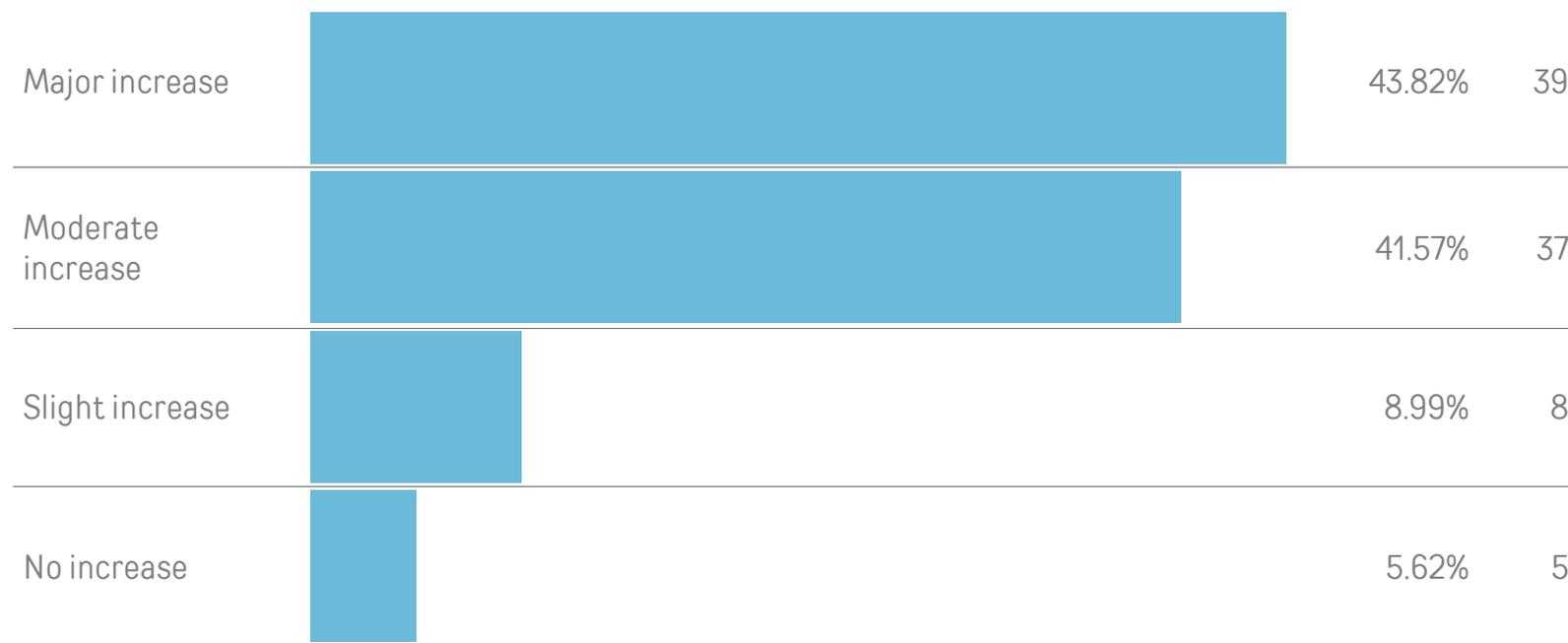
Q5: In your opinion, to what degree do the below factors influence the speed of construction of new housing development in B.C.?



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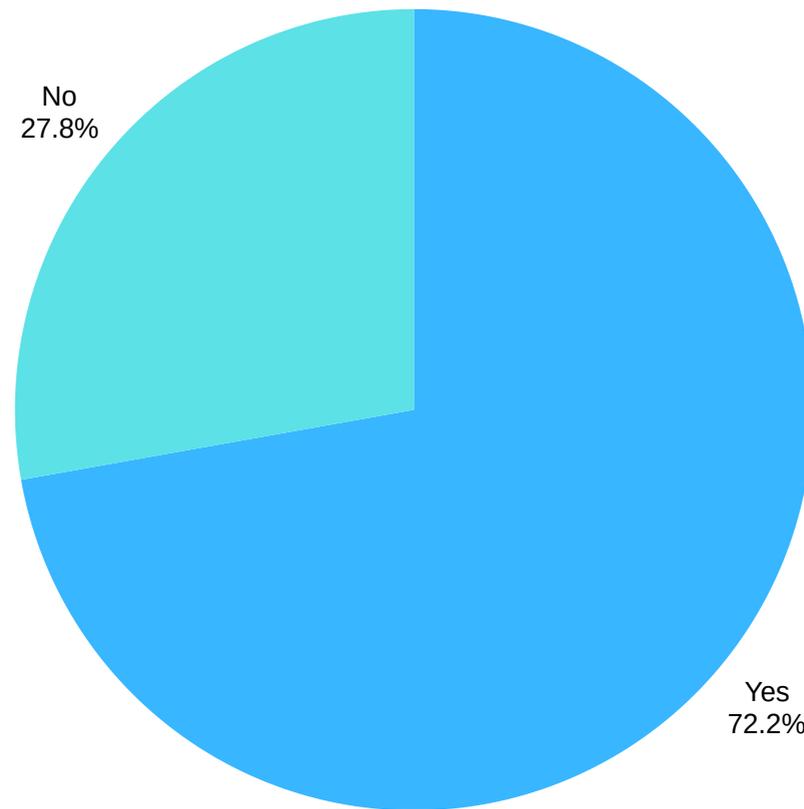
| | Not at all influential | | Slightly influential | | Moderately influential | | Highly influential | | Not sure/not applicable | | Total | Weighted Average |
|--|------------------------|----|----------------------|----|------------------------|----|--------------------|----|-------------------------|----|-------|------------------|
| 1 - Permitting time | 2.30% | 2 | 3.45% | 3 | 20.69% | 18 | 73.56% | 64 | 0.00% | 0 | 87 | 3.66 |
| 2 - Skilled labour shortages | 2.27% | 2 | 13.64% | 12 | 34.09% | 30 | 44.32% | 39 | 5.68% | 5 | 88 | 3.09 |
| 3 - Supply chain issues/shortages of construction materials | 4.55% | 4 | 19.32% | 17 | 32.95% | 29 | 40.91% | 36 | 2.27% | 2 | 88 | 3.06 |
| 4 - Land-use and zoning restrictions | 5.68% | 5 | 18.18% | 16 | 28.41% | 25 | 39.77% | 35 | 7.95% | 7 | 88 | 2.86 |
| 5 - Borrowing costs and interest rates | 15.91% | 14 | 27.27% | 24 | 20.45% | 18 | 27.27% | 24 | 9.09% | 8 | 88 | 2.41 |
| 6 - Development cost charges and levies | 12.64% | 11 | 31.03% | 27 | 25.29% | 22 | 19.54% | 17 | 11.49% | 10 | 87 | 2.29 |
| 7 - Land value | 21.59% | 19 | 18.18% | 16 | 21.59% | 19 | 25.00% | 22 | 13.64% | 12 | 88 | 2.23 |
| 8 - Energy efficiency requirements | 43.68% | 38 | 34.48% | 30 | 14.94% | 13 | 6.90% | 6 | 0.00% | 0 | 87 | 1.85 |
| 9 - Emissions requirements | 47.73% | 42 | 31.82% | 28 | 13.64% | 12 | 5.68% | 5 | 1.14% | 1 | 88 | 1.75 |

Q6: Do you feel market demand for climate-friendly, energy-efficient homes with better indoor air quality will increase by 2030?

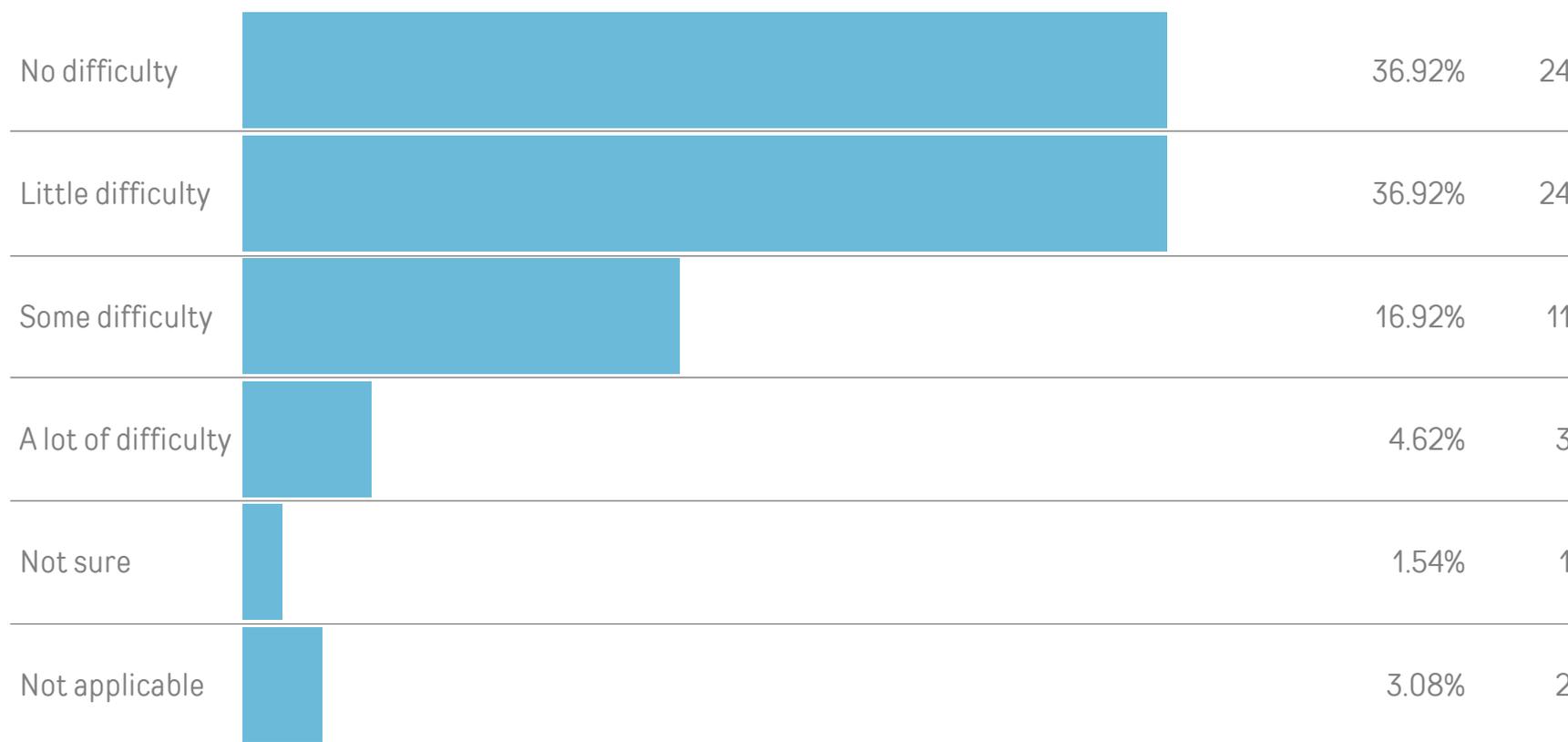


Q7: Is your organization involved in housing projects in Vancouver?

| | |
|-----|----|
| Yes | 65 |
| No | 25 |

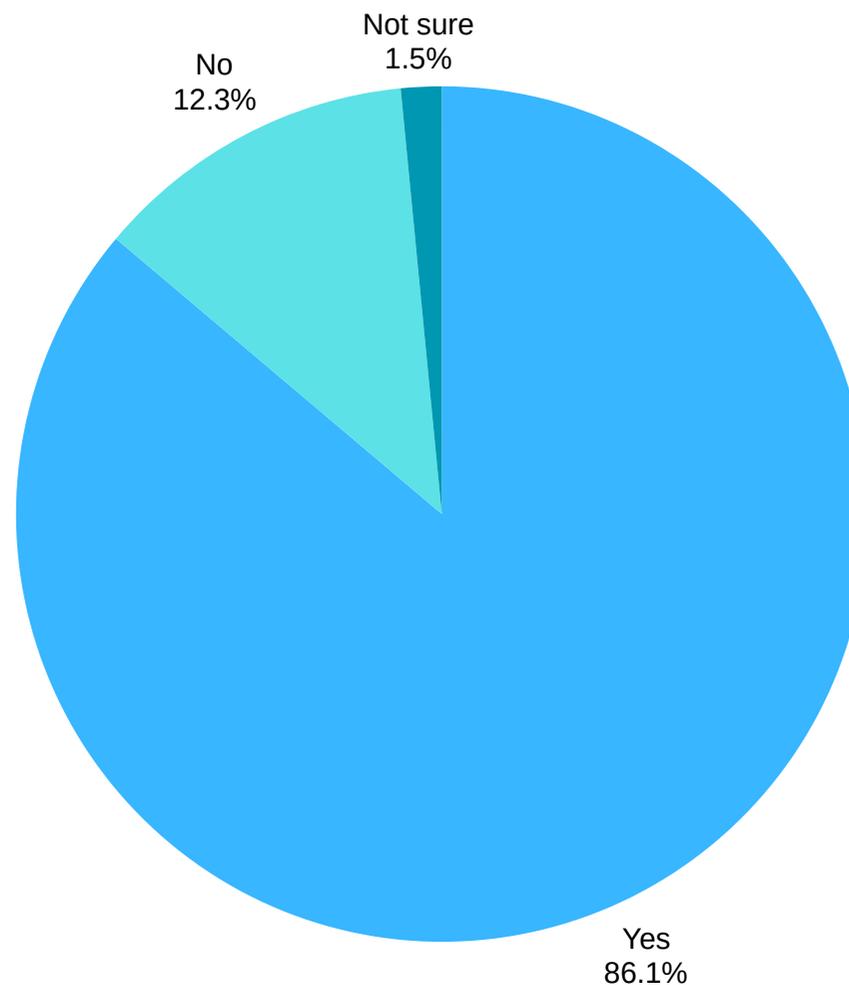


Q8: The City of Vancouver amended its building bylaw to improve energy efficiency and reduce emissions from small buildings in 2022 and from large buildings in 2023. What degree of difficulty did you have in meeting these requirements?

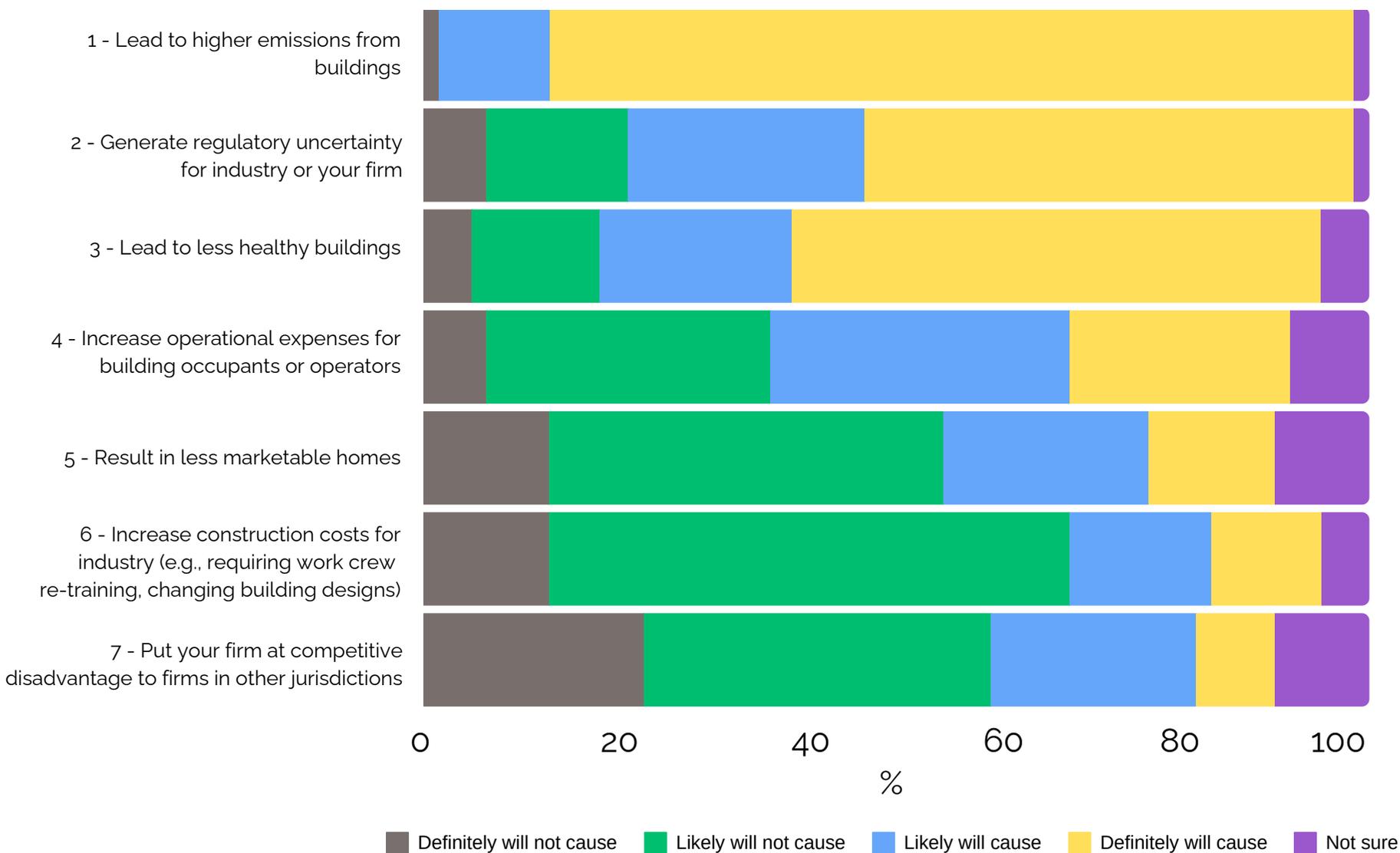


Q9: Have you heard of Vancouver city council's bylaw amendment to restore the option for new home construction to use natural gas for heating and hot water, thereby reversing restrictions that had been in place since 2020?

| | |
|----------|----|
| Yes | 56 |
| No | 8 |
| Not sure | 1 |



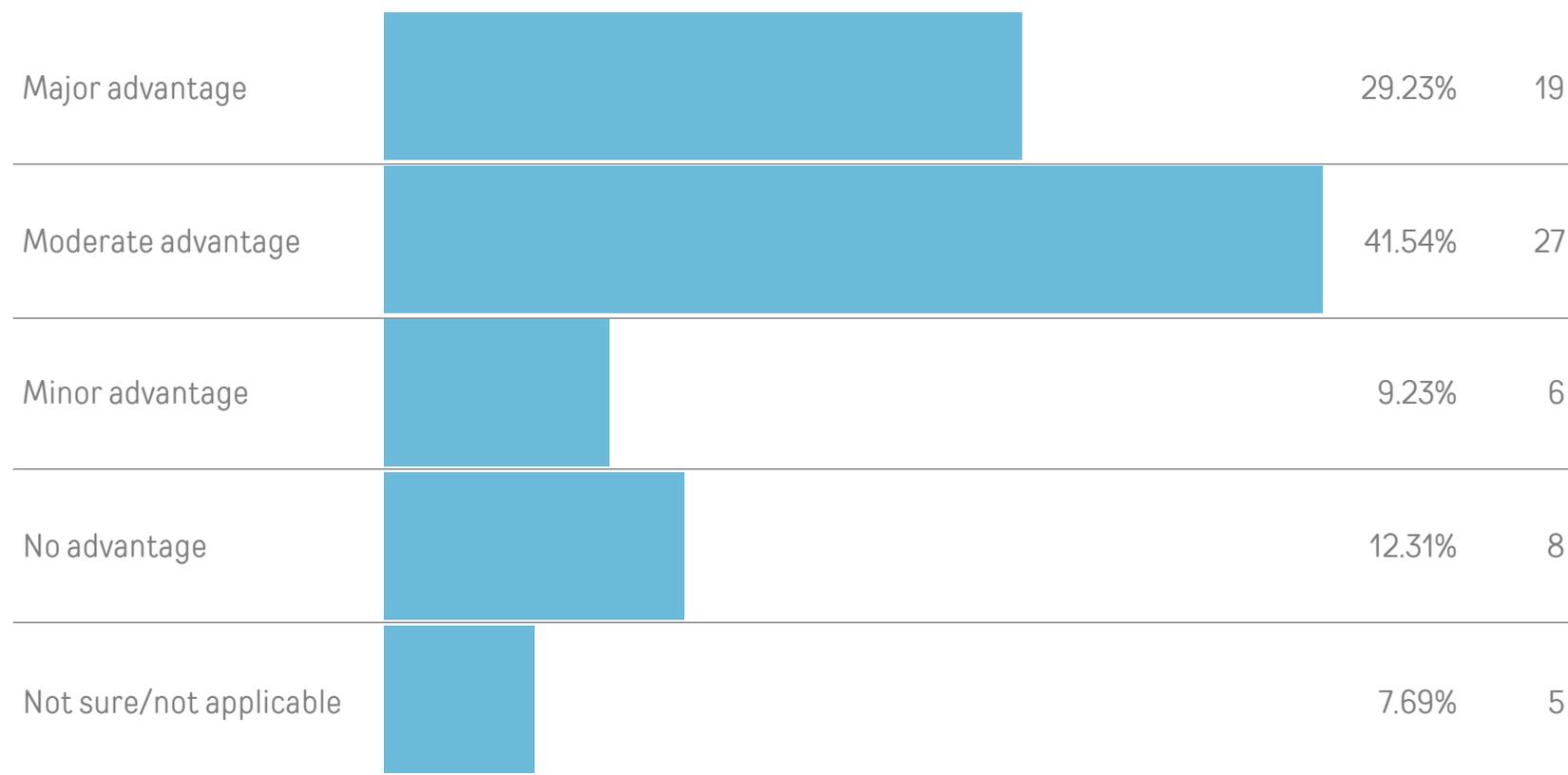
Q11: If the bylaw amendment to allow for the use of natural gas space and water heating is enacted, to what extent do you believe this will cause the following:



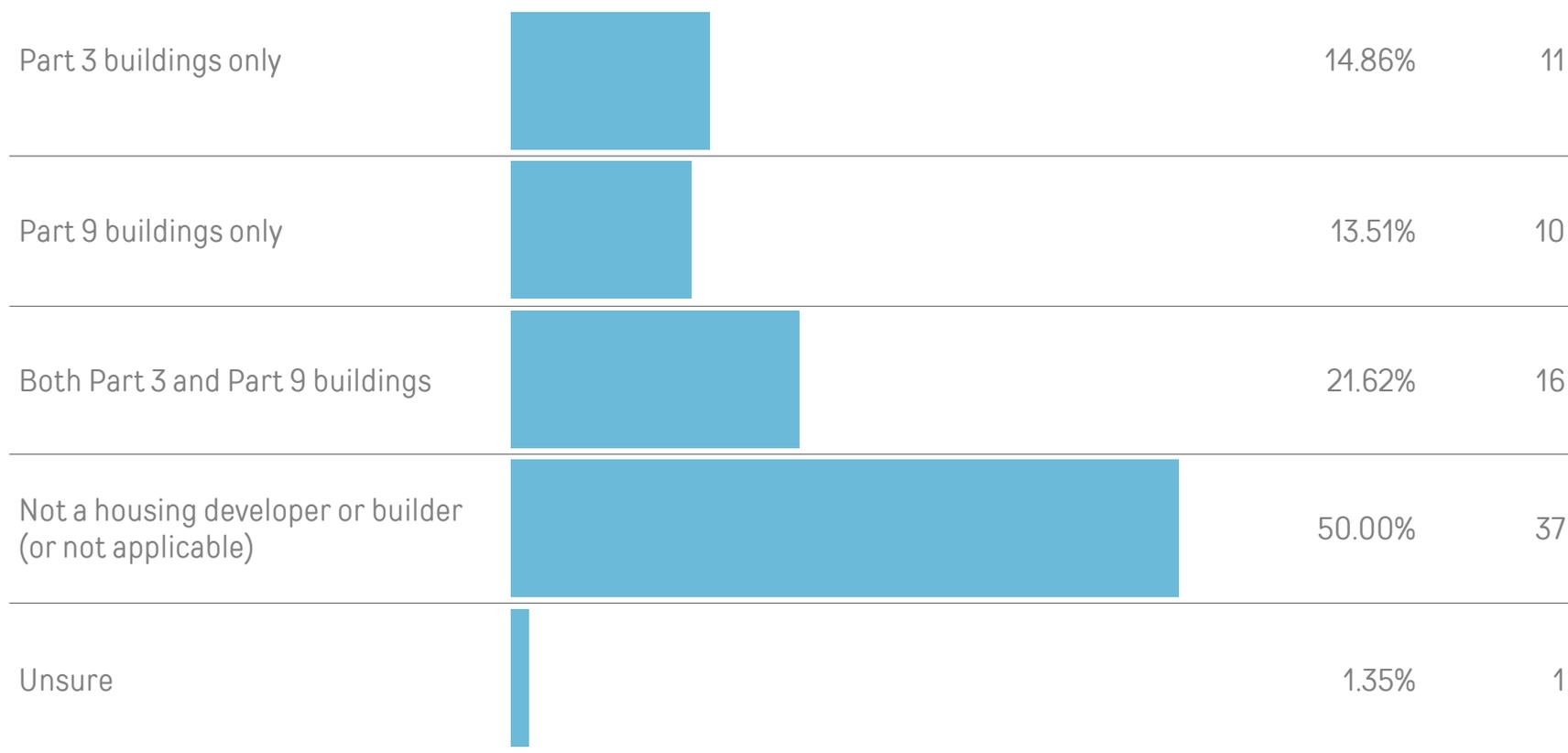
Q11: If the bylaw amendment to allow for the use of natural gas space and water heating is enacted, to what extent do you believe this will cause the following:

| | Definitely will not cause | | Likely will not cause | | Likely will cause | | Definitely will cause | | Not sure | | Total | Weighted Average |
|--|---------------------------|-------|-----------------------|-------|-------------------|-------|-----------------------|-------|----------|-------|-------|------------------|
| | % | Count | % | Count | % | Count | % | Count | % | Count | | |
| 1 - Lead to higher emissions from buildings | 1.54% | 1 | 0.00% | 0 | 12.31% | 8 | 84.62% | 55 | 1.54% | 1 | 65 | 3.77 |
| 2 - Generate regulatory uncertainty for industry or your firm | 6.15% | 4 | 15.38% | 10 | 24.62% | 16 | 52.31% | 34 | 1.54% | 1 | 65 | 3.2 |
| 3 - Lead to less healthy buildings | 6.25% | 4 | 12.50% | 8 | 18.75% | 12 | 57.81% | 37 | 4.69% | 3 | 64 | 3.19 |
| 4 - Increase operational expenses for building occupants or operators | 7.69% | 5 | 30.77% | 20 | 29.23% | 19 | 24.62% | 16 | 7.69% | 5 | 65 | 2.55 |
| 5 - Result in less marketable homes | 13.85% | 9 | 41.54% | 27 | 21.54% | 14 | 13.85% | 9 | 9.23% | 6 | 65 | 2.17 |
| 6 - Increase construction costs for industry (e.g., requiring work crew re-training, changing building designs) | 13.85% | 9 | 53.85% | 35 | 16.92% | 11 | 10.77% | 7 | 4.62% | 3 | 65 | 2.15 |
| 7 - Put your firm at competitive disadvantage to firms in other jurisdictions | 24.62% | 16 | 36.92% | 24 | 21.54% | 14 | 7.69% | 5 | 9.23% | 6 | 65 | 1.94 |

Q11: To what degree do you feel like meeting Vancouver's leading emissions regulations/bylaws has provided your business with a competitive advantage?



Q12: If you represent a housing developer or builder, which of the following does your firm or organization handle?



Methodology

- Survey in field from Sep. 26 – Oct. 8, 2024
- Administered online through the SurveyMonkey platform
- Survey participants were solicited through email invitation
- Open to building industry members (housing developers, construction, designers, and supply chain) operating in British Columbia

About ZEIC

The Zero Emissions Innovation Centre (ZEIC) is an independent, non-profit and charitable organization established to help catalyze and advance ambitious and innovative climate action in the Metro Vancouver region and beyond.



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