

Economic Development Strategy

Report 1 of 2:

Current Situation Assessment

Prepared for District of Saanich

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Abbreviations

ACCE	Association of Chamber of Commerce Executives
AFSP	Agriculture and Food Safety Plan
AI	Artificial Intelligence
ALR	Agriculture Land Reserve
BCA	British Columbia Assessment
BCEDA	British Columbia Economic Development Association
BIA	Business Improvement Area
CAM	Community Asset Mapping
CMA	Census Metropolitan Area
CMHC	Canada Mortgage and Housing Corporation
CRD	Capital Regional District
CRFAIR	Capital Region Food and Agricultural Initiatives Roundtable
DCC	Development Cost Charge
DOS	District of Saanich
ESG	Environmental, Social, Governance
FCM	Federation of Canadian Municipalities
GDP	Gross Domestic Product
GHG	Green House Gas
GVTA	Greater Victoria Transit Authority
HOG	Homeowners Grant
IoT	Internet of Things
LAP	Local Area Plan
LHA	Local Health Area
MFA	Municipal Finance Authority
MOU	Memorandum of Understanding
NAICS	North American Industrial Classification System
NIMBY	Not in My Back Yard
OCP	Official Community Plan
RD	Regional District
RFP	Request for Proposal
RGS	Regional Growth Strategy
SCO	Strengths, Challenges and Opportunities
SIPP	South Island Prosperity Partnership
UN	United Nations
UVIC	University of Victoria
VAA	Victoria Airport Authority
VIATEC	Victoria Innovation, Advanced Technology and Entrepreneurship Council
VITP	Vancouver Island Technology Park

1 Executive Summary

Introduction

- The District of Saanich (DOS), otherwise referred to in this document as Saanich, is developing a dynamic five-year Economic Development Strategy with a vision and actions that will achieve a prosperous, resilient and sustainable local economy.
- This ***Current Situation Assessment*** is the first of two reports that will be delivered as part of the strategy process. The second report will be the ***Economic Development Strategy***.
- This report uses primary and secondary research. Secondary data sources, statistics, documents and studies were assembled and reviewed to describe economic conditions and trends in Saanich and capital region. Primary research consisted of a citizen and business survey, community survey and focus groups that elicited feedback on a variety of community, development and economic issues affecting Saanich.

People

- In 2021, the population of Saanich was 124,640, making it the largest municipality in the capital region and on Vancouver Island. Saanich will continue to grow in the future, although the pace and extent will be determined by housing supply rather than demand. Between 18,000 and 27,000 new residents are expected by 2046, requiring between 9,000 and 10,000 new dwelling units.
- The average age in Saanich is 44.4 years, slightly older than the provincial average age of 42.8 years, but younger than the CRD average of 45.2 years. The average personal income was \$44,800 in 2021 on par with the CRD average but higher than the BC average wage.
- In 2021 the housing stock in Saanich numbered 48,045 dwelling units. Since 2011 the increase in inventory, and the increase in population, has been almost entirely concentrated in the rental market. One in six owners and one in every two and a half renters spend more than 30% of their income on housing. Housing affordability is more focused on the rental market than the owned market.

Economy

- The labour force in Saanich is heavily concentrated in public services. Only one in eight workers is involved in producing goods, compared to close to one in five provincially. Major industries include health care and social services, public administration and retail.
- Three in five Saanich workers travel outside the municipality to their place of work, a slightly lower proportion than the CRD average. When they go to work they are more likely to take transit and less likely to walk or bike than their CRD counterparts. Only 17% spend more than 30 minutes commuting each day.
- Saanich has a greater percentage of its labour force in education, health care, public administration, professional and technical services, accommodation and food services and

arts, entertainment and recreation than the province does. Conversely, the proportion in primary activities, such as agriculture, forestry and fishing, and manufacturing, is less.

- In 2022, there were 3,590 business establishments in Saanich with employees. Most are providing services, 22% are involved in goods production.
- Saanich performs relatively well on the South Island Prosperity Partnership's Prosperity Index, which is meant to track regional prosperity across the Greater Victoria metropolitan area. Employment, technology labour force and education metrics for Saanich in 2021 were comparable to Greater Victoria, while income and income equality measures were slightly better. The share of total population accounted for by immigrants is also higher. Where Saanich noticeably lags the region is in per capita house construction.

Community

- Saanich has several plans, including the District's corporate strategy and the Official Community Plan (OCP), that set out economic objectives. Common themes are diversification, infrastructure, land for employment, workforce, sustainability and housing. Education, agri-food, services and technology sectors are recognized for their contribution to the economy and sustainability objectives.
- The South Island Prosperity Partnership (SIPP) provides leadership, guidance and programming on economic development matters for the capital region. SIPP's current strategic plan has four pillars, leadership, innovation ecosystems, workforce development and place making.
- Residential property tax rates in Saanich comparable to other CRD municipalities while business property tax rates are the highest in the region. Similarly, taxes on the average home are the second highest in the region, exceeded only by Oak Bay.
- Single-detached dwellings dominate the housing stock in Saanich however the supply has remained virtually unchanged in the last decade. Almost all new dwellings are in multi-family properties, but the pace of growth is well behind the region's housing starts leaders.
- A 3% vacancy rate represents balance in the rental housing market. Today, the rate in the CRD is half that and has never been above 3% over the last 15 years.
- The real estate market for employment lands in Saanich is constrained. Despite covid-related effects, the office market in Greater Victoria has proven to be one of the most stable in the country. Industrial vacancy of 2% continues to be amongst the lowest in the country as demand far outstrips supply. Rental rates are the second highest in the country behind Vancouver. Saanich supplies 19% of all industrial land in Greater Victoria but activity is static, with no vacant space, a nil vacancy rate, no absorption activity and no new supply coming online or in development. Retail tenant activity is recovering from the pandemic and remains strong in the region, though larger spaces continue to experience soft demand.
- Community infrastructure assets influence economic activity because they encourage investment, the flow of goods and services and they are critical in supporting the local labour market. These assets are things the community would want to sustain, expand and

diversify to ensure wealth and stability for future generations. Key economic assets tend to be regional in nature, including the airport, port, BC Ferries and highways #1 and #17. Saanich benefits greatly from its post-secondary institutions as well. Prominent socio-community assets include a strong network of neighbourhood associations and other community groups, civic, education and recreation infrastructure and shopping nodes. Natural assets are remarkably diverse (and sensitive) given Saanich’s relatively small physical footprint. Numerous watersheds and aquifers complement an extensive park and trail system and a 30-kilometre coastline. The climate is amongst the rarest in Canada, featuring warm-summer Mediterranean conditions.

What We Heard

- **Saanich Citizen and Business Survey (2023)** – in the citizen’s component of this survey the most important issues were housing affordability, transportation and infrastructure, and planning and development. Business survey respondents had similar priorities. The majority believed Saanich was a good place to operate a business but less than half (45%) thought the regulatory environment was fair. More than 60% were largely satisfied with the overall level and quality of services provided by Saanich. Economic development priorities were business retention, community health and safety, workforce development, entrepreneurship and housing affordability.
- **Community Survey (2023)** – In the community survey, respondents favoured an overall objective of growing and diversifying the local economy—fewer than one in ten believed the community should not grow. Key strengths were location, quality of life, availability of services, education services, green space and a stable, diverse economy. Key challenges were affordable housing, cost of living, household incomes, transit and congestion, land/buildings for business, walkability and the lack of a defined downtown. Top-rated goals were community health and safety, housing availability, business retention, household incomes and entrepreneurship.
- **Focus Groups (2023)** – The focus groups covered strengths, challenges and opportunities in six sectors of the local and regional economies. Highlights for each were as follows.
 - Saanich has favourable conditions for agri-food production, including a good growing climate, rising demand and an established local supply chain that can bring local production to market. However, getting access to land, especially for young farmers, is difficult while climate change and the rising costs of business are economic challenges. Land brokering and matching, food to table initiatives, agri-tourism and networking and ecosystem development would help expand the impacts and benefits of this sector.
 - Saanich has real strengths in the post-secondary education space with the University of Victoria and Camosun College, which are economic engines but have an important role as well in place making through their development, promotion and talent attraction activities. As with other sectors, the rising cost of living, housing and business adversely affect student, staff and faculty recruitment while on-campus development to address these issues can be onerous and slow moving. These institutions have the land, capital

and partnerships to drive more investment and activity in the knowledge and creative sectors as growth and diversification sectors for Saanich.

- Tourism has good potential in Saanich due to its proximity to Victoria, access to outdoor recreation areas, greenspace and coastline and basic transportation infrastructure. However, poor transport options for those without cars, high housing prices, a tight labour market and declining access from US markets are concerns. The lack of accommodation properties results in fewer overnight stays and consequently less visitor spending on food and beverage services, retail and transportation. Areas of opportunity are hotels to address all price points, agri-tourism, garden tourism, sport tourism and nature-based visitor experiences.
- The discussion on General Business mirrored the strengths noted by other focus sessions, namely the location, lifestyle, climate, landscape and accessibility of services, as well as the challenges, including housing affordability, tight labour supply, transportation services and lack of land/building supply. Education, film/media, agri-food and technology were areas of opportunity.
- In the Real Estate session, local conditions were said to be positive, with both demand and supply components closely influenced by the community's post-secondary institutions. Saanich remains an attraction retirement destination for those who can afford to live here. On the downside, long permitting times, exclusionary neighbourhoods, the absence of defined economic districts (including downtown), high business costs, and decentralization land use is impeding investment and economic diversification. Improvements to the transit system, more intensive use of employment lands and enhanced business climate could unlock potential in education, warehousing and storage, health care, professional, technical and scientific services that will drive employment activity in the future.
- Technology, notably life sciences, is a growing sector in Saanich. There is a vibrant biotech startup ecosystem, expanding film and media space and growing research and development capacity that supports the broader tech-based ecosystem. There are inherent advantages over the Lower Mainland and an unrivalled quality of life that continues to draw in talent and investment. Yet growth is uneven and cluster effects have proven elusive. Low commercial and industrial real estate vacancies, high business costs and a challenging housing environment hamper development. Some technology and innovation companies whose production activities do not match outdated zoning language may also be holding back investment. It will be necessary to entice more early-stage startup activity and assist existing businesses advance through successive technology readiness levels if a more expansive ecosystem is to be encouraged. Sectors that Saanich could target include life sciences, smart agriculture, ocean sciences and cleantech, while talent recruitment remains an overarching need across all sectors.

Strengths, Challenges and Opportunities

- Saanich’s economic strengths come from its natural endowments, economic diversity, access to economic infrastructure and a safe and secure community. An attractive climate and marine environment with access to BC’s major population centres draws in residents and business investment. The economic base is spread across goods and services production while a cluster of post secondary institutions boost the economy by investing in human capital, research and development capacity and innovation.
- As the average age in Saanich continues to increase, labour force participation rates are declining, as is the ratio of jobs to population. An accessible, quality labour supply will be needed to keep businesses and public services going in the future. This will have implications for housing and transportation services to ensure labour mobility is flexible and responsive to regional demand. Saanich has made a commitment to preserve and protect its green belt while also maintaining regional job to population targets, which will intensify competing land uses and friction. The lack of a defined downtown or central shopping core will make densification and infill strategies more difficult to implement.
- The opportunities for Saanich are in three key areas: the knowledge, technology and creative sectors where future job growth will be concentrated, traditional industries like agri-food and tourism that leverage the region’s natural resource base and innovations in critical services and infrastructure that can accommodate sustainable diversification and growth that can drive prosperity and maintain quality of life.

2 Introduction

2.1 Background

Saanich is a district municipality on Vancouver Island in British Columbia, within the Greater Victoria area. It is the most populous municipality in the Capital Regional District and Vancouver Island, and the eighth-most populous in the province.

It has a vibrant and diverse economy, connected locally, regionally, and globally. Economic activity is primarily in services although it has capacity in goods industries including manufacturing and construction.

The clean, appealing environment, skilled workforce and responsible public services make Saanich an ideal location in which to live, work and conduct business. Its community infrastructure sustains and enhances the Saanich economy, while meeting social and environmental commitments. Growing the commercial tax base ensures long term financial sustainability.

Its challenge is to build an economy that is responsive to change and provide viable economic opportunities in a rapidly globalizing world. (VITP 2022)

2.2 Purpose

The District is seeking a dynamic five-year Economic Development Strategy that creates a vision for the local economy and provides specific implementable actions to achieve economic resiliency post COVID-19 and a path forward to sustain and grow a diverse and prosperous economy. This Strategy should leverage the progress, assets and investments that have already been made in the District and identify gaps that should be filled to create a diverse economy. The District's strategic assets in the context of the Capital Regional District should be a prime focus of the Strategy, as is alignment with other municipal plans both existing and upcoming.

This **Current Situation Assessment** is the first of two reports that will be delivered as part of this study. The second report will be the **Economic Development Strategy**, comprising vision and goal statements, strategic plan, action plan and monitoring plan.

2.3 Methodology

This report is based on a compilation and synthesis of primary and secondary research. Secondary data sources, statistics, documents and studies were assembled and reviewed to describe economic conditions and trends in the District and capital region. A list of all references is provided in Chapter 9.

Primary research consisted of surveys, focus groups and key informant interviews conducted between September 2022 and March 2023. The citizen and business satisfaction survey (BC Stats 2023), launched by the District prior to the commencement of the Economic Development Strategy project and managed by BC Stats, received 739 responses across three components, with the business survey receiving 127 responses. Further information on methodology and results can be found on the District [website](#).

The community survey was open for a four-week period between mid February and mid March, 2023, receiving 1,338 responses. It solicited feedback on community, development and economic issues affecting the District today and in the future. Results are shown in Appendix A.

Focus groups were held in Saanich on February 28 and March 1, 2023 at the Cedar Hill Golf Course. A total of 51 participants engaged in discussion on the community's strategic economic strengths, challenges and opportunities and how they might affect the direction and practice of economic development by the municipality moving forward.

Key informant interviews will be undertaken in May and June to provide guidance on strategy direction and priorities.

2.4 Report Structure

This report has the following key sections.

Chapter 3 explores demographic and household data from the Census of Canada.

Chapter 4 provides an economic profile with reference to the employment, business and economic base data.

Chapter 5 discusses community characteristics in terms of municipal planning, assets and amenities, real estate, housing and taxation.

Chapter 6 highlights key trends affecting economic development.

Chapter 7 presents a “What We Heard” summation of the engagement process.

Chapter 8 concludes the report with a Strengths, Challenges and Opportunities analysis.

All references cited in this report appear in **Chapter 9**.

3 People

3.1 Population

Table 1 shows census population data for Saanich, CRD and British Columbia between 1976 and 2021. Saanich's population has grown over 66% during this time, a slower rate than that experienced by the CRD or the province.

Table 1: Population and Population Change, 1976 to 2021

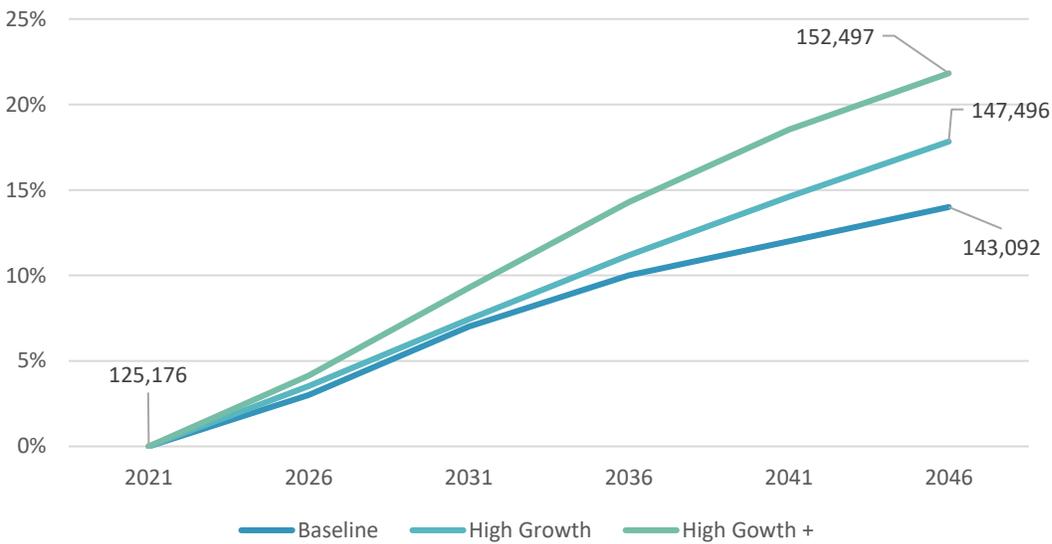
	Population			Percentage Change		
	Saanich	Capital Regional District	British Columbia	Saanich	Capital Regional District	British Columbia
1976	75,190	236,245	2,533,795	0%	0%	0%
1981	80,795	255,880	2,823,930	7%	8%	11%
1986	86,045	275,045	3,003,620	14%	16%	19%
1991	98,065	307,645	3,373,785	30%	30%	33%
1996	105,255	331,100	3,874,315	40%	40%	53%
2001	108,065	340,000	4,076,880	44%	44%	61%
2006	111,295	355,050	4,241,795	48%	50%	67%
2011	111,520	367,615	4,502,105	48%	56%	78%
2016	119,210	400,560	4,859,250	59%	70%	92%
2021	124,640	432,060	5,214,805	66%	83%	106%

Source: BC Stats (1998a,1998b, 2020a, 2020b, 2020c)

3.2 Population Projections

Figure 1 shows population projections for Saanich for the 2021 to 2046 period. Three scenarios are presented, including a high population growth scenario which would see the addition of 27,321 residents by 2046, a 22% increase. In the base line scenario, 22,916 additional residents would call Saanich home, an increase of 18%. A low-growth scenario has Saanich growing by 17,916 residents, a 14% increase by 2046.

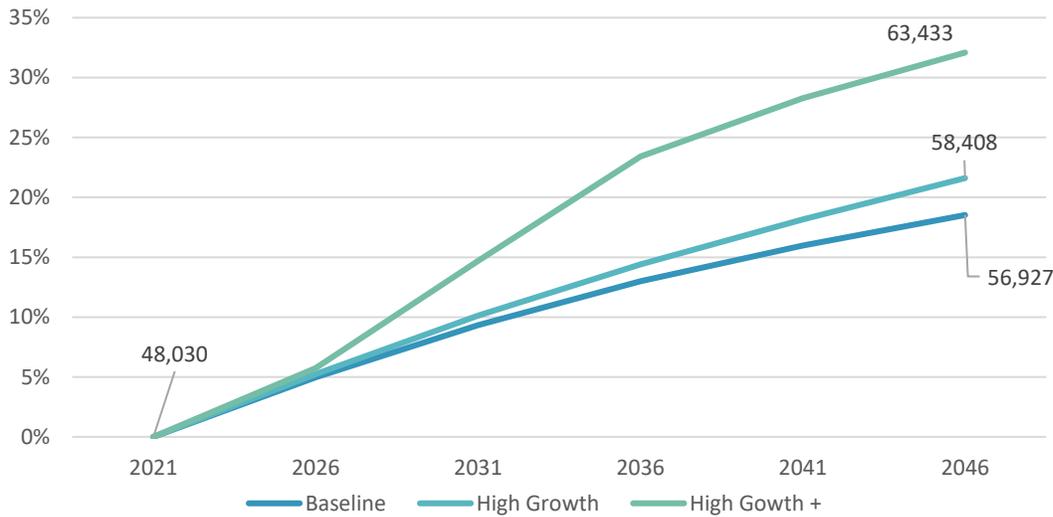
Figure 1 Saanich Population Projections, 2021-2046



Source: Licker (2023)

Figure 2 shows the anticipated growth in dwellings required to accommodate each of the three population scenarios. Over the 2021 to 2046 period a projected 15,413 dwelling units would be required in the high growth scenario, 10,378 units in the baseline scenario, and 8,807 units in the low growth scenario. Dwelling units are projected to outpace population growth with high growth scenario requiring an increase in units by 32% compared to 22% increase in population. At the low growth scenario, unit increase is anticipated to rise by 19% to accommodate a population increase of 14%.

Figure 2 Dwelling Projections for Saanich, 2021-2046



Source: Licker (2023)

3.3 Age Characteristics

Table 2 shows the age characteristics of Saanich residents for 2001 and 2021. The population had increased by 14,090 during this time, with growth occurring in all age categories, except the 0-to-19 age group which has declined in absolute and relative terms.

In 2021, Saanich had a high share of population over 65 when compared to British Columbia and correspondingly lower shares in the other age categories. This was also the case in 2001, however, it is noted that this gap has been narrowing over time. Both Saanich and BC are getting older but Saanich is doing so less fast than BC.

Table 2: Population by Age Group, 2001 and 2021

	Saanich				British Columbia	
	2001		2021		2001	2021
Age 0 - 19	23,825	23.0%	21,680	18.4%	25.0%	19.4%
Age 20 – 44	34,630	33.4%	37,935	32.2%	36.3%	33.3%
Age 45 – 64	27,075	26.1%	30,965	26.3%	25.1%	27.0%
Age 65+	18,125	17.5%	27,165	23.1%	13.6%	20.3%
Total	103,655	100.0%	117,745	100.0%	100.0%	100.0%

Source: Statistics Canada (2001a, 2022)

3.4 Median Age

In 2021, the shift towards an increasingly older average age was reversed in Saanich for the first time in 20 years (Table 3). Between 2001 and 2016 the median age in Saanich climbed from 41.0 years to 44.5 years, but in 2021 was down slightly to 44.4. The CRD and province have followed a similar trend with all three jurisdictions showing a decline in median age in 2021.

Table 3: Median Age in Years, 2001 to 2021

	2001	2006	2011	2016	2021
Saanich	41.0	42.9	44.0	44.5	44.4
Capital Regional District	41.4	43.6	44.8	45.5	45.2
British Columbia	38.4	40.8	41.9	43.0	42.8

Source: Statistics Canada (2001a, 2007, 2012, 2017a)

3.5 Income

Median incomes for men and women in Saanich, the CRD and BC between 2005 and 2020 are shown in Table 4. In 2020, the average female income in Saanich was slightly higher than the CRD and noticeable higher than the rest of BC, while the average male income was lower than the CRD but again much higher than BC. The growth in personal income for both males and females exceeded CRD and BC growth rates during this period.

Table 4: Median Personal Income and Change, 2005 to 2020

	2005	2010	2015	2020	Change 2005-20
Saanich					
Male	\$30,810	\$40,125	\$42,685	\$49,200	159.69%
Female	\$21,975	\$29,140	\$33,225	\$41,200	187.49%
Total	\$25,970	\$34,015	\$37,300	\$44,800	172.51%
Capital Regional District					
Male	\$34,485	\$39,200	\$43,280	\$50,400	146.15%
Female	\$23,875	\$28,165	\$32,520	\$40,800	170.89%
Total	\$28,290	\$32,985	\$37,100	\$45,200	159.77%
British Columbia					
Male	\$32,375	\$35,625	\$40,370	\$47,200	145.79%
Female	\$20,460	\$23,625	\$27,545	\$36,000	175.95%
Total	\$25,720	\$28,765	\$33,010	\$40,800	158.63%

Source: Statistics Canada (1996, 2013, 2017a)

3.6 Housing Tenure

The housing stock in Saanich has increased from 45,390 in 2011 to 48,045 in 2021 for an increase of 2,655 units or 5.8% (Table 5). Over the same period the population increased by 13,120 residents or by 8.2%. All the growth in housing between 2011 and 2021 was in rentals, while the number of owners was virtually the same. This contrasts with the CRD where owner housing stock increased by 10.0% and renters increased 25.6% between 2011 and 2021.

Table 5: Housing By Tenure for Saanich, 2011 to 2021

Affordability	2011		2021	
Owner	33,250	73.3%	33,270	69.2%
Renter	12,140	26.7%	14,775	30.8%
Dwelling provided by local government	0	0.0%	0	0.0%
Total	45,390	100.0%	48,045	100.0%

Source: Statistics Canada (2013, 2022)

The proportion of owned houses that were carrying debt increased in Saanich from 51.9% in 2011 to 53.1% in 2021 (Table 6). However, overall affordability measures improved--16.6% were spending more than 30% on shelter costs in 2021, down from 21.7% in 2011.

Table 6: Owned Housing in Saanich, 2011 to 2021

	2011		2021	
Owner households	33,250	100.0%	33,270	100.0%
Household with Mortgage	17,255	51.9%	17,665	53.1%
Households spending 30% or more on shelter	7,215	21.7%	5,525	16.6%

Source: Statistics Canada (2013, 2022)

Saanich added 5,635 new renter households between 2011 and 2021, an increase of 46.4% (Table 7). There was an increase in the number of subsidized units of 290, however, in relative terms the proportion of subsidized to total rentals declined from 15.8% to 12.4%. The provincial benchmark in 2021 was 11.0%.

Close to 40% of renters spent 30% or more on shelter costs in 2021, down from 44.8% in 2011 but still higher than the provincial rate of 37.8%. It is noted that the Covid pandemic and associated federal programming assistance such as the Canada Emergency Response Benefit, which counts as income for recipients, affected the share of owners and renters falling with the 30% affordability threshold. Whether that assistance increased median incomes or mitigated a drop in median incomes from what otherwise might have been is unknown.

Table 7: Rental Housing in Saanich, 2011 to 2021

	2011		2021	
Renter households	12,140	100.0%	17,775	100.0%
Households in subsidized housing	1,915	15.8%	2,205	12.4%
Households spending 30% or more on shelter	5,440	44.8%	6,950	39.1%

Source: Statistics Canada (2013, 2022)

4 Economy

4.1 Labour Force by Industry

In 2021, 12.0% of the Saanich labour force was in goods-producing industries, the largest sector being construction followed by manufacturing (Table 8). By comparison the provincial labour force involved in goods production was 18.3%. The goods-producing labour force is overwhelmingly made up of men (81.7%).

Table 8: Experienced Labour Force for Saanich, 2021

	Men+	Women+	Total	Saanich Share	BC Share
11 Agriculture, forestry, fishing & hunting	345	280	625	1.0%	2.3%
21 Mining, quarrying, and oil and gas	60	10	70	0.1%	0.9%
22 Utilities	155	45	200	0.3%	0.6%
23 Construction	4,130	500	4,630	7.4%	8.8%
31-33 Manufacturing	1,440	530	1,970	3.2%	5.7%
Goods Producing	6,130	1,365	7,495	12.0%	18.3%
41 Wholesale trade	655	280	935	1.5%	3.0%
44-45 Retail trade	3,595	3,490	7,085	11.3%	11.3%
48-49 Transportation and warehousing	1,730	495	2,225	3.6%	5.4%
51 Information and cultural industries	585	360	945	1.5%	2.7%
52 Finance and insurance	840	1,030	1,870	3.0%	3.6%
53 Real estate and rental and leasing	585	615	1,200	1.9%	2.2%
54 Prof., scientific and technical	3,535	2,520	6,055	9.7%	9.0%
55 Manag. of companies and enterprises	50	15	65	0.1%	0.2%
56 Admin. & support, waste management	1,645	940	2,585	4.1%	4.1%
61 Educational services	2,200	3,545	5,745	9.2%	7.3%
62 Health care and social assistance	2,230	7,150	9,380	15.0%	12.0%
71 Arts, entertainment and recreation	745	740	1,485	2.4%	2.3%
72 Accommodation and food services	2,200	2,340	4,540	7.3%	6.9%
81 Other services (except public admin.)	1,015	1,470	2,485	4.0%	4.3%
91 Public administration	3,445	3,970	7,415	11.9%	5.4%
Service Producing	25,055	28,960	54,015	86.4%	79.6%
Industry - not applicable	520	505	1,025	1.6%	2.0%
Total	31,705	30,830	62,535	100.0%	100.0%

Source: Statistics Canada (2022)

Services account for 86.4% of the Saanich experienced labour force, the largest industries being health care and social services (9,380), followed by public administration (7,415) and retail (7,085). In comparison, services at the provincial level makes up 79.6% of the labour force.

Whereas men are overrepresented in goods production, women are overrepresented in services, particularly in health care and social assistance.

A comparison of goods versus services employment in Saanich between 2001 and 2021 shows that the share of goods is increasing, even though services still predominate (Table 9). This is a positive sign because average incomes tend to be higher in goods industries. It also implies a growing demand for land to support goods production such as manufacturing.

Table 9: Experienced Labour Force in Goods and Services Production, 2001 to 2021

	2001	2006	2011	2016	2021	Change 2001-21	
						Saanich	BC
Goods-Producing	5,975	7,360	6,610	6,685	7,495	25.4%	16.7%
Service-Producing	47,905	51,830	52,500	52,665	54,015	12.8%	32.5%
Total	53,880	59,190	59,110	59,350	61,510	14.2%	29.2%

Source: Statistics Canada (2013, 2022)

4.2 Labour Force by Occupation

Table 12 indicates the share of the labour force in Saanich in 2021 by occupation rather than industry. Sales and service occupations is the largest category for women and second largest for men+. The largest occupation group for men (24.0%) is trades, transportation and equipment operators and related occupations. The second largest occupation by share for women+, it is business, finance and administration occupations (24.3%).

Table 10: Allocation of Experienced Labour Force to Goods and Services Production, 2001 to 2021

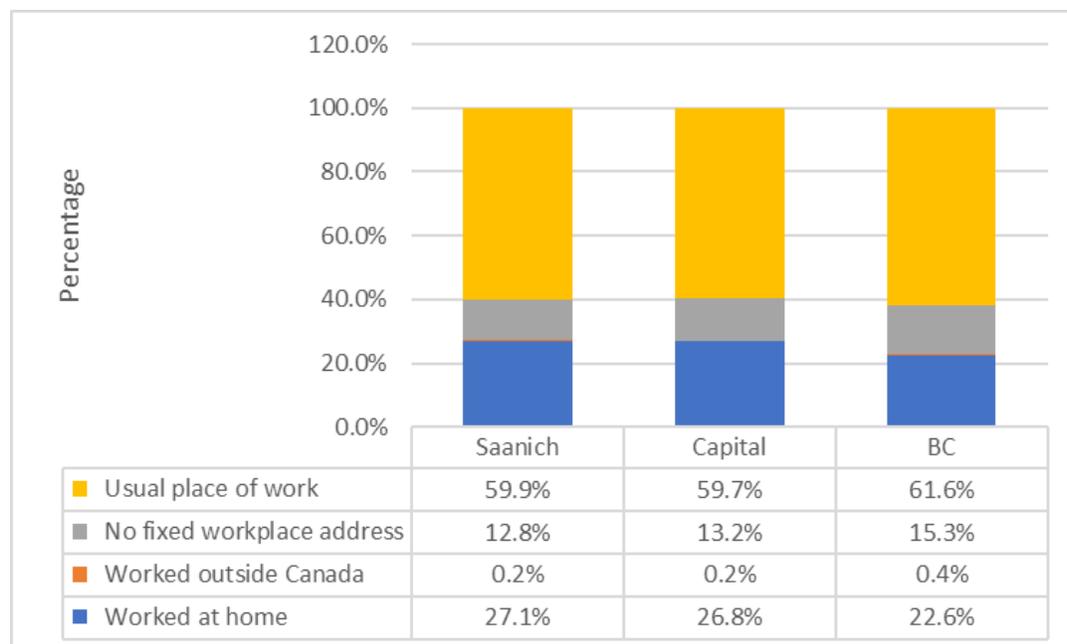
	Men+	Women+	Total
Occupation - not applicable	1.6%	1.6%	1.6%
All occupations	98.4%	98.4%	98.4%
0 Legislative and senior management occupations	1.5%	1.1%	1.3%
1 Business, finance and administration occupations	10.2%	24.3%	17.1%
2 Natural and applied sciences and related occupations	14.5%	4.7%	9.7%
3 Health occupations	4.7%	14.3%	9.4%
4 Occupations in education, law and social, community & gov't	11.0%	19.4%	15.1%
5 Occupations in art, culture, recreation and sport	3.5%	4.5%	4.0%
6 Sales and service occupations	23.3%	26.1%	24.7%
7 Trades, transport & equip. operators and related occupations	24.0%	2.2%	13.2%
8 Natural resources, agr. & related production occupations	3.0%	1.2%	2.1%
9 Occupations in manufacturing and utilities	2.6%	0.6%	1.6%
Total - Labour force	100.0%	100.0%	100.0%

Source: Statistics Canada (2022)

4.3 Labour Force Mobility

The place of work pattern for Saanich residents is comparable to the CRD and BC, with around 60% travelling to a usual place, that is to an office or site of their employer. Saanich have over a quarter of its labour force working from home, markedly higher than at the provincial level. This is likely attributable to the prevalence of public sector jobs and the decision by government agencies to allow for hybrid work arrangements.

Figure 3: Usual Place of Work for Employed Labour Force By Percentage Share, 2021



Source: Statistics Canada (2022)

Most residents of Saanich and the CRD travel outside their resident municipality to work (Table 11).

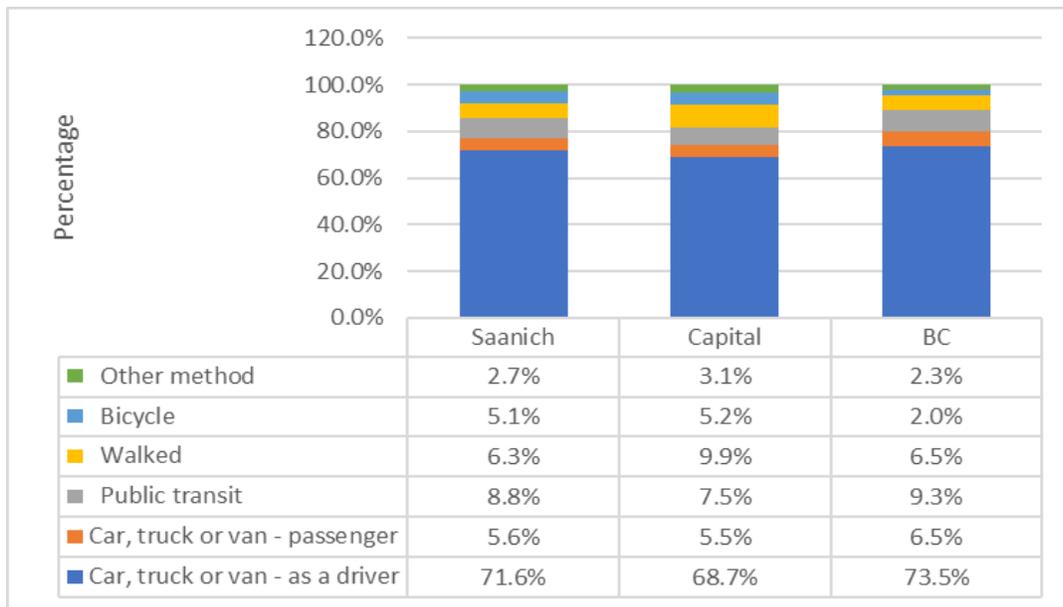
Table 11 Community Destination for the Employed Labour Force, 2021

	Saanich		Capital RD	
Commute within municipality of residence	13,805	39.6%	51,200	41.2%
Commute to a different municipality within the RD of residence	20,430	58.6%	70,070	56.4%
Commute to different municipality and RD within province	545	1.6%	2,460	2.0%
Commute to a different province or territory	110	0.3%	510	0.4%
Total	34,890	100.0%	124,240	100.0%

Source: Statistics Canada (2022)

As seen in Figure 4, over 70% of workers in Saanich travel to work in their own vehicle, about the same as BC but slightly more than the CRD average. Public transit accounts for almost 9% of commuting, while biking and walking collectively make up just over 11%.

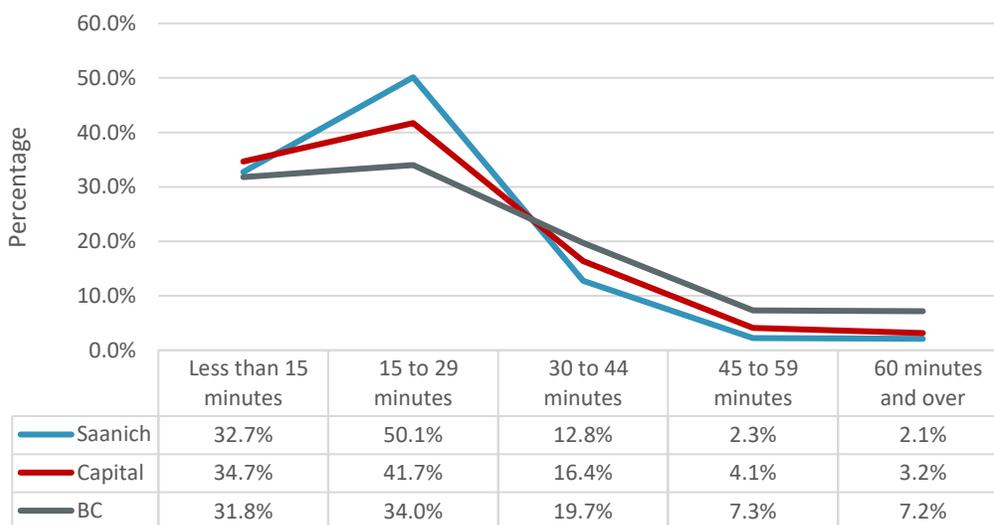
Figure 4: Main Mode of Transportation for the Employed Labour Force, 2021



Source: Statistics Canada (2022)

Half of Saanich workers commute less than 30 minutes daily, another third travel 15 minutes or less (Figure 5). Only 17% of the employed labour force in Saanich have commute times over 30 minutes, significantly less than CRD and BC commuters.

Figure 5: Commuting Duration for Employed Labour Force, 2021



Source: Statistics Canada (2022)

4.4 Employment Concentration

Location quotients are ratios that compare a community's labour force concentration by sector to a benchmark area, in the following tables the province of BC. Table 12 shows location quotients for Saanich in 2011 and 2021. A location quotient of greater than one indicates the community has a greater share of its employment in that sector than the province, and vice versa, less than one indicates proportionately less employment.

A location quotient of greater than "1" implies some form of competitive advantage that explains the concentration. In Saanich, education, health care and public administration are top performers, while professional and technical services, accommodation and food services and arts, entertainment and recreation also exceed the provincial share. Goods production in the form of primary activities, such as agriculture, forestry and fishing, and manufacturing play a much smaller role in the local economy when compared to the province.

The trendlines for sector concentration is mixed. Most of the service sectors maintained or grew their concentration between 2011 and 2021. In terms of goods production, construction was down slightly, however agriculture and manufacturing both increased. Still, these two key sectors remain underrepresented in the local labour force when compared to the province.

Table 12: Saanich Location Quotients for Labour Force by Industry

North American Industrial Classification System (NAICS) Sector (2 digit)	2011	2021	Trendline
11 Agriculture, forestry, fishing and hunting	0.32	0.43	▲
21 Mining, quarrying, and oil and gas extraction	0.12	0.11	◀▶
22 Utilities	0.60	0.56	▼
23 Construction	0.86	0.83	▼
31-33 Manufacturing	0.48	0.53	▲
41 Wholesale trade	0.73	0.49	▼
44-45 Retail trade	1.01	0.99	◀▶
48-49 Transportation and warehousing	0.63	0.66	◀▶
51 Information and cultural industries	0.67	0.56	▼
52 Finance and insurance	0.78	0.82	▲
53 Real estate and rental and leasing	0.87	0.85	◀▶
54 Professional, scientific and technical services	1.09	1.07	◀▶
55 Management of companies and enterprises	0.65	0.52	▼
56 Administrative and support, waste management and remediation services	0.91	1.00	▲
61 Educational services	1.25	1.24	◀▶
62 Health care and social assistance	1.26	1.24	◀▶
71 Arts, entertainment and recreation	1.01	1.10	▲
72 Accommodation and food services	1.05	1.08	▲
81 Other services (except public administration)	0.87	0.93	▲
91 Public administration	2.17	2.19	◀▶

Source: Statistics Canada (2012, 2022)

Note: BC is used as benchmark for 2011 and 2021

The level of industry agglomeration can have a substantive impact on the interpretation of census labour force data. In the preceding table, there is a clear reliance on the service sector from the viewpoint of basic breakdown of the economy by major (2-digit) sectors. Table 13 below presents a more detailed picture based on data for subsectors (3-digit). Those with a location quotient of more than 1.10 are shown. Predictably, public administration, education and health care services make the list, while a variety of personal and business services are also present. The manufacturing sector does not have a major presence in the employment data but there are four subsectors that outperform the province, including electrical equipment and computers. Transportation is important as a service and as a goods provider. The tourism and recreation sectors are also a strength. Perhaps surprisingly, given its population base, there are only two retail subsectors appearing.

Table 13: Saanich Location Quotients for Labour Force by Industry, Top Performers in 2021

North American Industrial Classification System (NAICS) Subsector (3 digit)	2021
526 Funds and other financial vehicles	10.44
316 Leather and allied product manufacturing	7.43
912 Provincial and territorial public administration	4.19
487 Scenic and sightseeing transportation	3.32
483 Water transportation	2.35
712 Heritage institutions	1.66
911 Federal government public administration	1.61
335 Electrical equipment, appliance and component manufacturing	1.57
334 Computer and electronic product manufacturing	1.50
623 Nursing and residential care facilities	1.44
621 Ambulatory health care services	1.33
485 Transit and ground passenger transportation	1.31
814 Private households	1.26
445 Food and beverage stores	1.24
611 Educational services	1.24
336 Transportation equipment manufacturing	1.21
492 Couriers and messengers	1.16
913 Local, municipal and regional public administration	1.14
523 Securities, commodity contracts, and other financial investment and related activities	1.13
721 Accommodations services	1.12
622 Hospitals	1.12
713 Amusement, gambling and recreation industries	1.12
451 Sporting goods, hobby, book and music stores	1.11
446 Health and personal care stores	1.10

Source: Statistics Canada (2012, 2022)

4.5 Shift-Share Analysis

The same labour force data used in the above table is modelled differently to illustrate the shifting structure of the economy in Table 14. Shift-share analysis breaks down the 1,805 jobs that were added to the local economy between 2011 and 2021 into three components:

- **Change in total provincial jobs.** If provincial employment is growing, then it is reasonable to expect local and sector growth to be increasing as well, everything else being equal. This provincial growth effect is determined by multiplying 2011 base employment for Saanich by the percentage change in total BC job growth between 2011 and 2021.
- **Change in provincial sector jobs.** The industry mix is calculated by multiplying 2011 base employment for Saanich by the percentage change in BC employment between 2011 and 2021, for that same sector.
- **Change attributable to local conditions.** This third component (local competitive) is the residual of the other two components. This local competitive effect is arrived at by multiplying the 2011 base employment for Saanich by the percentage change in that sector's change in employment in Saanich, less the percentage change for that sector in BC.

Table 14 shows the shift-share analysis of Saanich employment by sector between 2011 and 2021. The data suggest that Saanich employment growth has under-performed provincial and sector growth rates for the decade ending in 2021 for local competitive reasons. In other words, employment in Saanich grew less than overall provincial employment growth and provincial sector growth for all sectors, save one—agriculture.

Even for sectors in which the District has clear concentrations, such as public administration, health care and education, did not grow as one might expect based on provincial total and sector employment growth.

These data do not tell us anything about the causal factors at play, that is, why Saanich is not keeping pace with provincial employment and sector employment growth. The workings of the labour market are complex and dynamic and it is likely many supply and demand-side factors are interacting with and influencing local employment levels.

However, one likely contributor to this apparent under-performance is the community's labour force participation rate. Between 2011 and 2021 the population of Saanich grew 14% whereas employment only grew 3%. The proportion of the population over the age of 65 is higher in Saanich than in BC, while the participation rate (the share of population over the age of 15 that is actively involved in the labour market) is lower. This means that there are proportionately fewer residents engaged in the labour force when compared to the province.

Table 14 Shift-Share Analysis of Sectors in Saanich, 2011 and 2021

	Provincial Growth	Sector Mix	Local Competitive	Total
11 Agriculture, forestry, fishing and hunting	53	13	53	120
21 Mining, quarrying, and oil and gas extraction	9	-1	-23	-15
22 Utilities	24	25	-55	-5
23 Construction	446	1,152	-1,008	590
31-33 Manufacturing	211	62	-173	100
41 Wholesale trade	197	-191	-742	-735
44-45 Retail trade	791	845	-1,476	160
48-49 Transportation and warehousing	222	325	-286	260
51 Information and cultural industries	121	136	-386	-130
52 Finance and insurance	218	83	-286	15
53 Real estate and rental and leasing	144	81	-269	-45
54 Professional, scientific and technical services	584	1,595	-1,205	975
55 Management of companies and enterprises	5	55	-30	30
56 Administrative and support, waste management and remediation services	261	224	-235	250
61 Educational services	633	753	-1,171	215
62 Health care and social assistance	952	2,250	-1,957	1,245
71 Arts, entertainment and recreation	163	-22	-161	-20
72 Accommodation and food services	548	-381	-787	-620
81 Other services (except public administration)	292	-29	-338	-75
91 Public administration	943	16	-1,474	-515
Total change 2011 to 2021*	6,817	6,991	-12,008	1,800

Source: Statistics Canada (2012, 2022)

Note: * Statistics Canada rounds all data to the nearest 20th; sums may not equal totals

4.6 Business Establishments

In 2022, there were 3,590 establishments in Saanich with employees. Establishments include all business entities, not just private sector but public, non-profit, institutions and social enterprises. As seen in Table 15, the share of establishments producing goods versus services is virtually the same in Saanich as it is in the CRD. In BC the share of business establishments engaged in goods production is higher than in Saanich, 22% versus 18%.

Table 15 Number and % Share of Establishments, 2022

	Saanich	%	CRD	%	BC	%
Goods	630	18%	2,606	18%	41,833	22%
Services	2,960	82%	11,712	82%	152,019	78%
Total	3,590	100%	14,318	100%	193,852	100%

Source: Statistics Canada (2022a)

The subsectors with the most business establishments for Saanich, CRD and BC are shown in Table 16. There is considerable alignment among the leading subsectors indicating that Saanich has a comparable business profile to the CRD and the province. The data give a comparable picture to the labour force profile presented earlier of a predominantly service-based local economy.

Table 16 Leading Subsectors by Number of Establishments, 2022

Saanich	%	CRD	%	BC	%
541 - Professional, scientific and technical services	15%	541 - Professional, scientific and technical services	16%	541 - Professional, scientific and technical services	13%
621 - Ambulatory health care services	12%	621 - Ambulatory health care services	11%	238 - Specialty trade contractors	9%
238 - Specialty trade contractors	8%	238 - Specialty trade contractors	8%	621 - Ambulatory health care services	8%
531 - Real estate	6%	722 - Food services and drinking places	6%	722 - Food services and drinking places	6%
561 - Administrative and support services	6%	531 - Real estate	5%	531 - Real estate	5%
236 - Construction of buildings	5%	561 - Administrative and support services	5%	561 - Administrative and support services	4%
722 - Food services and drinking places	5%	236 - Construction of buildings	5%	236 - Construction of buildings	4%
912 - Provincial and territorial public administration	4%	813 - Religious, grant-making, civic, and professional and similar organizations	3%	813 - Religious, grant-making, civic, and professional and similar organizations	3%
624 - Social assistance	3%	624 - Social assistance	2%	811 - Repair and maintenance	3%
813 - Religious, grant-making, civic, and professional and similar	3%	812 - Personal and laundry services	2%	484 - Truck transportation	2%

Source: Statistics Canada (2022a)

The number of establishments by employee size (Table 17) shows Saanich as having a similar distribution of establishments to the CRD and BC.

Table 17 Number and % Share of Establishments by Employee Size, 2022

#	Saanich	%	CRD	%	BC	%
1-4	2,131	59.4%	7,891	55.1%	121,297	57.2%
5-9	628	17.5%	2,734	19.1%	39,924	18.8%
10-19	414	11.5%	1,864	13.0%	26,043	12.3%
20-49	281	7.8%	1,203	8.4%	16,212	7.6%
50-99	74	2.1%	385	2.7%	5,341	2.5%
100-199	38	1.1%	154	1.1%	2,096	1.0%
200-499	16	0.4%	64	0.4%	941	0.4%
500+	8	0.2%	23	0.2%	332	0.2%
Total	3,590	100.0%	14,318	100.0%	212,186	100.0%

Source: Statistics Canada (2022a)

4.7 Prosperity Index

Table 18 shows indicators drawn from the South Island Prosperity Partnership’s Prosperity Index, which is meant to track regional prosperity across the Greater Victoria metropolitan area and provide a snapshot of its position and progress relative to peer cities across Canada and around the globe (SIPP 2020). In its 2020 evaluation, Greater Victoria performed well on economic resiliency, income distribution, ethnic diversity, and support for environmentally sustainable practices. It performed poorly on housing, homelessness and transportation.

The data in Table 18 have been updated since the last Prosperity Index report was published, with Saanich included for comparison purposes. Employment, technology labour force and education metrics for Saanich in 2021 were comparable to Greater Victoria, while income and income equality measures were slightly better. The share of total population accounted for by immigrants is also higher. Where Saanich noticeably lags the region is in per capita house construction—Victoria and the Westshore are adding inventory across the housing spectrum at greater rates than Saanich.

Table 18: Saanich and Victoria CMA Prosperity Index, 2021

	Saanich	Victoria CMA
Economic Resiliency Indicators		
Unemployment rate	6.8%	6.9%
Percentage of labour force employed in technology	13.1%	13.2%
Median household income	\$93,000	\$85,000
Prevalence of low income	8.2%	8.9%
Postsecondary certificate, diploma or degree	61.4%	61.8%
New homes under construction per 100,000 (avg 2012-2021) ^b	283	803
Equity and Inclusion		
Labour force commuting less than 15 minutes	32.7%	33.8%
Immigrant population	22.5%	18.9%
Gini coefficient for income inequality (0-1, 0 = perfect equality)	0.324	0.329
Population attached to a physician at the practice level	n/a	75.9%
Spending less than 30% of income on shelter costs	76.5%	74.0%
Apartment vacancy rates ^b	1.3%	1.0%
Environmental Prosperity		
Percentage of total energy derived from renewable sources	n/a	40.0%
Fine particulate matter (PM2.5) concentration	5.0	5.0
Energy poverty ^a (% households paying > twice median energy cost)	15%	14%
Greenhouse gas (GHG) emissions, tonnes per capita ^c	1.095	1.310
Percentage of commuters not using a personal vehicle	22.8%	26.1%
Percentage of commuters walking and biking to work	11.4%	15.3%
Percent of commuters taking public transit	8.8%	7.7%

Source: Statistics Canada (2022) a McNaughton (2020) b CMHC (2022, 2023) c Government of BC (2023f, 2023g) d Government of BC (2023h)

Note: n/a not available

5 Community

5.1 Planning Context

5.1.1 Saanich Corporate Strategic Plan

In 2019 Council adopted a corporate strategy titled the Strategic Plan 2019-2023. The vision and overall direction of this document reinforce Official Community Plan (OCP) guidance, as well as processes, programs, strategies and plans that have evolved since the OCP was first published.

The following economic development goals were identified:

- A diversified economic base;
 - attract new and nurture existing businesses and industries
 - encourage a supportive business climate
 - promote Saanich as an effective place for businesses and industries
 - protect commercial and industrial lands
- Strategic dialogue with key institutions and organizations;
- Economic development as a key focus area;
 - support initiatives and organizations that enhance economic development
 - investigate opportunities for Saanich-based economic development

5.1.2 Official Community Plan

The OCP was adopted in 2008.¹ It is the principal legislative tool for guiding future growth and change in Saanich, reflecting the fundamental values of the community and directions for achieving a collective vision of what Saanich should be (DOS 2008). The OCP is meant to guide growth management, land and resource use, transportation and mobility, environmental sustainability, and accommodation of different forms of human activity, including residential, recreation, civic and business.

The OCP's Vision preamble states:

Saanich is a sustainable community where a healthy natural environment is recognized as paramount for ensuring social well-being and economic vibrancy, for current and future generations.

In the Vision, Economic Vibrancy was defined as follows:

Saanich's economy is connected locally, regionally, and globally, providing diverse economic opportunities, ranging from high technology to agriculture. Our economy and labour force is

¹ The OCP is being updated at time of writing.

responsive and has the ability to adapt to change. Saanich’s clean, appealing environment, skilled workforce, responsive public services, and excellent community infrastructure make it an ideal location to live, work, and conduct business.

Policies guiding economic vibrancy include the following.

- Economic Infrastructure
 - Update business policy and regulatory processes that improve customer service and maintain comparable taxes and fees with other regional jurisdictions;
 - Liaise with the business community on a regular basis;
 - Be responsive to emerging “new economy” business sectors;
 - Support the development of Business Improvement Areas (BIA);
 - Support community economic development through promotion;
 - Support the retention and recruitment of a qualified labour pool;
 - Work with BC Transit to ensure adequate public transit to major employment nodes;
 - Seek the efficient and timely movement of goods to and in Saanich and the region; and
 - Support economic development within “Centres” and “Villages”.
- Diversification & Enhancement
 - Support the implementation of Saanich’s “Economic Strategy”;
 - Work with partners on a regional economic strategy;
 - Support the Greater Victoria Development Agency;
 - Support a balanced economy by encouraging commercial, service, research, high tech and industrial uses, while focusing development on “Centres” and “Villages”;
 - Support a regional industrial and high-tech strategy;
 - Supporting the Vancouver Island Technology Park and research related activities on the University of Victoria, Royal Roads and Camosun College Campuses.
 - Encourage market diversification of agriculture;
 - Participate in partnerships to promote tourism;
 - Support tourist-related facilities;
 - Work with the film industry to attract more film productions;
 - Encourage innovation, investment, technology development, and sustainable business practices; and
 - Encourage local business to become more sustainable.

Economic themes are otherwise threaded throughout the OCP in alignment with environmental and social objectives. Key sections that speak directly to economic objectives, and their associated policies, include the following. Readers will note that some Economic Vibrancy policies are repeated to reflect mutual values and objectives.

- Industrial Land
 - Preserve the integrity of the industrial land base;

- Support the preparation of a regional industrial and high-tech strategy; and
- Apply zoning and regulations that support economic viability.
- Schools, Knowledge Centres & Institutional
 - Support the preparation of a regional industrial and high-tech strategy dealing with issues of future trends, related infrastructure requirements, transportation and land requirements, and options for growth.
- Agriculture and Food Safety
 - Ensure a healthy, sustainable and stable food supply;
 - Develop regulations and guidelines for agri-tourism and intensive agriculture;
 - Support innovative farming and local marketing techniques;
 - Support efforts to enhance farmland and increase crop yield;
 - Support specialty crop farms to diversify farm production; and
 - Support small-scale agricultural initiatives on lands inside the Urban Containment Boundary.
- Employment
 - Encourage new institutions and businesses that create permanent employment;
 - Continue to support the work of the Greater Victoria Development Agency;
 - Work with regional partners to support employment and training opportunities;
 - Support the labour pool with access to housing and services such as childcare;
 - Work with BC Transit for public transit to major employment nodes;
 - Seek the efficient and timely movement of goods to and in Saanich and the region; and
 - Support tourist related facilities.

5.1.3 Agriculture and Food Security Plan

The Agriculture and Food Security Plan (AFSP) was published in 2018 following several years of direction and pre-planning by District Council. A Task Force was set up and through a public engagement process identified the following key themes that are addressed in the Plan.

- Food security;
- Food self-sufficiency;
- Local food system awareness;
- Interconnection between food production and the environment;
- Farmland protection;
- Support for farmers; and
- Opportunities for urban agriculture.

Objectives and strategies were created for each theme and implementation plan put in place. Council endorsed the AFSP and funded implementation.

5.1.4 Housing Needs Study

The District prepared a housing needs study in 2020 that inventoried the housing stock, estimated current and projected population and engaged the community on housing issues and outlined recommendations for areas of local need (Urban Matters 2020).

The major housing needs identified in the engagement process were as follows:

- Affordability;
- Homelessness;
- Rental options;
- Indigenous housing;
- Youth and student housing; and
- Non-market housing.

Challenges included:

- Lack of supply, especially family housing (i.e., 2+ bedroom units), seniors accommodation and non-market units;
- Lengthy development approvals process; and
- Lack of rental incentives.

The opportunities identified:

- Large land base in the District;
- Higher density housing;
- Rental housing; and
- Workforce housing (not defined in the study).

5.1.5 Saanich Housing Strategy

The Saanich Housing Strategy provides direction on how the municipality plans to contribute to improving housing opportunities and outcomes and address housing supply, diversity, and affordability. It builds on existing local and regional plans, policies, and initiatives. The Strategy comprises seven focus areas, 22 strategies, and 73 actions over a 10-year plan horizon.

The seven focus areas are:

- Affordable and supportive housing;
- Rental housing;
- Housing diversity and supply;
- Barriers to development;
- Partnerships;
- Community engagement; and
- Land speculation. (DOS 2021)

5.1.6 Climate Plan

In 2020, the District produced its Climate Plan which outlined corporate commitments to be 100% powered by renewable energy by 2050 (DOS 2020). The Plan has implications for the District as an operating entity and for policies and guidelines that affect land development and agriculture. Initiatives were proposed for the following:

- Mobility and active transportation;
- Buildings and infrastructure;
- Food and materials;
- Ecosystems;
- Community wellbeing; and
- Leadership in District operations.

Major effect pathways for economic activity in the community include building development focused on climate change adaptation and renewable energy, self-sufficiency of the local food system, and community preparedness for climate change.

5.1.7 South Island Prosperity Partnership (SIPP)

The South Island Prosperity Partnership (SIPP) is an alliance of over 70 public and private-sector partners in Greater Victoria, including 11 local governments, nine First Nations, three post-secondary institutions, nine industry associations and non-profits, and more than 30 major employers. SIPP works to bolster our region's economic and social prosperity by catalyzing the creation of high-quality, household-sustaining jobs, so that more families can afford to live, work and build a life in the region. Saanich is a member of SIPP and has access to its services and programs.

SIPP's current strategic plan (SIPP 2021), titled Rising to Resilience, has four pillars:

- Committed Leadership and Public Engagement;
 - Lead the region toward being more innovative, diversified, resilient, inclusive and sustainable future
 - Provide thought leadership
 - Develop partnerships
 - Engage municipal leadership
- Invest in Innovation Ecosystems;
 - Catalyze and support innovation eco-systems
- Invest in Inclusion and the Future Workforce;
 - Act as a connectivity hub for information-sharing for Indigenous people and non-Indigenous businesses
 - Access and develop opportunities in the ocean and marine sector

- Facilitate, connect and grow Indigenous partnerships, blue economy ecosystem and business networks
- Find, share and advocate for opportunities for Indigenous businesses and support Indigenous businesses to successfully bid and secure contracts for the growth and development of their businesses
- Tell Our Own Story; and
- develop a place-based narrative, visual toolbox and marketing initiative to position Greater Victoria as a magnet for attracting people, investment and companies.

5.1.8 Capital Region Food and Agricultural Initiatives Roundtable

The DOS provides funds provided to CRFAIR (\$10,000 in 2022) that supports staff time to advance and coordinate local food security and sustainability initiatives in Saanich. This includes implementation of the Saanich Agriculture and Food Security Plan (SAFSP), a key Initiative of the Strategic Plan under the Climate Action and Environmental Leadership Goal area. Three activity areas are prioritized : (1) the work of the Food and Agriculture Planner on Saanich priority initiatives for 2022; (2) Supporting Food systems action as Climate Solutions, (3) Support Land Access and Food and Farming Business Sector Development (CRFAIR 2023).

5.1.9 Regional Growth Strategy

A regional growth strategy is a framework, developed by municipalities and the regional district in partnership, for identifying social, economic and environmental objectives. Its purpose, under Part 13 of the Local Government Act, is to “... promote human settlement that is socially, economically, and environmentally healthy and that makes efficient use of public facilities and services, land and other resources.” (CRD 2018)

Economic Development considerations outlined in the Strategy include:

- a minimum jobs/population ratio of 0.60 in the Core Area and 0.53 in the Saanich Peninsula;
- work collaboratively with First Nations on economic development matters;
- long term, affordable supply of strategic economic resources such as water, aggregate and energy;
- increasing economic activity in forestry and agriculture;
- protect space-extensive industrial/business land;
- enhance established employment centres;
- integrate high-value, clean industry and business in complete communities;
- attract, develop and maintain a highly skilled workforce; and
- reduce poverty.

5.2 Taxation

5.2.1 Assessed Property Values

Property in Saanich is valued by BC Assessment (BCA) at almost \$44.8 billion (Table 19). The residential property class accounts for \$42.0 billion, or 93.8% of the total. Business and other make up most of the remainder at almost \$2.7 billion or 6.0% of the assessed value.

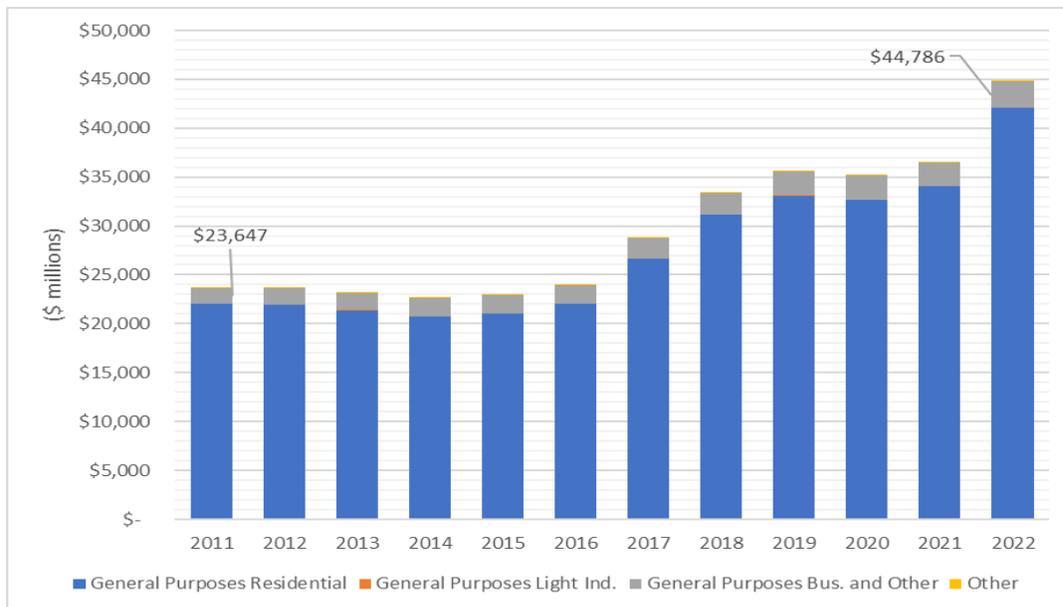
Table 19 Saanich Assessed Property Values By Property Class, 2022

General Purposes Residential	General Purposes Light Ind.	General Purposes Bus. and Other	All Other	Total General Purposes Assessed Value
42,045,648,460	33,977,400	2,659,104,964	47,448,559	44,786,179,384

Source: Government of BC (2023a)

Figure 6 shows the growth in assessed values between 2011 to 2022. The marked jumped in values since 2016 are noted.

Figure 6 Saanich Assessed Property Values By Class, 2011-2022



Source: Government of BC (2023a)

5.2.2 Property Tax Rates

Property tax rates outlined in Table 20; the residential rate is 4.31 per million dollars of assessed value, the business rate of more than four times higher at 18.87.

Table 20 Saanich Tax Rates By Property Class

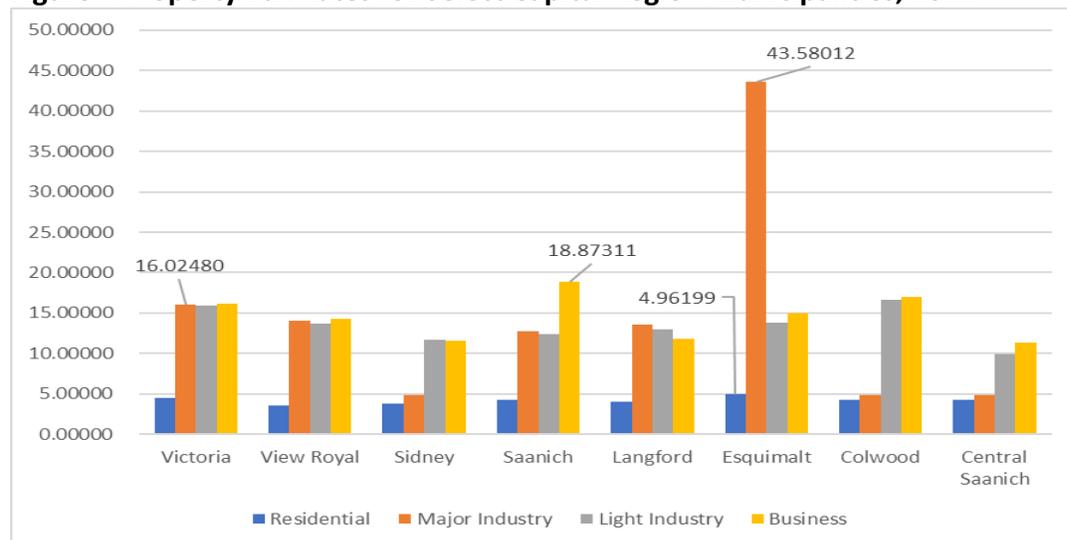
Purpose of Tax Rate	Residential	Utilities	Supportive Housing	Major Industry	Light Industry	Business	Managed Forest Land	Recreation Non-Profit	Farm ¹
Municipal	2.71774	25.58371	2.71775	6.92159	6.92159	13.05151	19.57716	8.25184	0.50000
Reg'l District	0.20406	1.92094	0.20406	0.51970	0.51970	0.97996	1.46994	0.61958	0.03754
Hospital	0.14079	0.49277	0.14079	0.47869	0.47869	0.34494	0.42237	0.14079	0.14079
School	1.05790	12.72000	0.10000	3.52000	3.52000	3.52000	1.90000	2.03000	6.98000
Other	0.19670	1.33950	0.16180	1.33950	0.97690	0.97670	1.10860	0.19670	0.19670
Totals	4.31719	42.05692	3.32440	12.77948	12.41688	18.87311	24.47807	11.23891	7.85503

Source: Government of BC (2023b)

Note on School Tax Rates: The Province currently has two tax credit programs: the Provincial Industrial Property Tax Credit which gives a 60% school tax reduction to Class 4 (Major Industry), and the Provincial Farm Land Tax Credit which gives a 50% school tax reduction to Class 9 (Farm) properties. The Ministry of Municipal Affairs and Housing does not take these credits into account when reporting property tax rates.

Figure 7 compares the tax rates of selected Capital Region municipalities to Saanich. As illustrated, residential property taxes are comparable to other CRD municipalities while business property tax rates are the highest among the comparable communities.

Figure 7 Property Tax Rates for Select Capital Region Municipalities, 2022

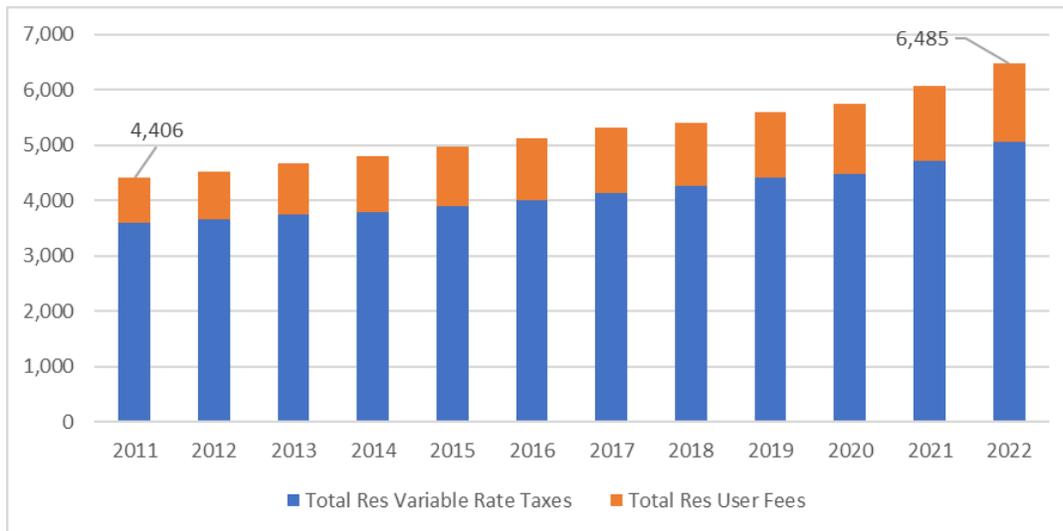


Source: Government of BC (2023b)

5.2.3 Taxes and Charges on Representative House

Figure 8 shows the change in taxes and charges on a representative house between 2011 and 2022. The total increased from \$4,406 in 2011 to \$6,485 in 2022, a 47% rise. It is noted that this increase accounts not just for municipal operations but increasingly for School, Hospital, BC Assessment (BCA), Municipal Finance Authority (MFA), and other provincial agencies.

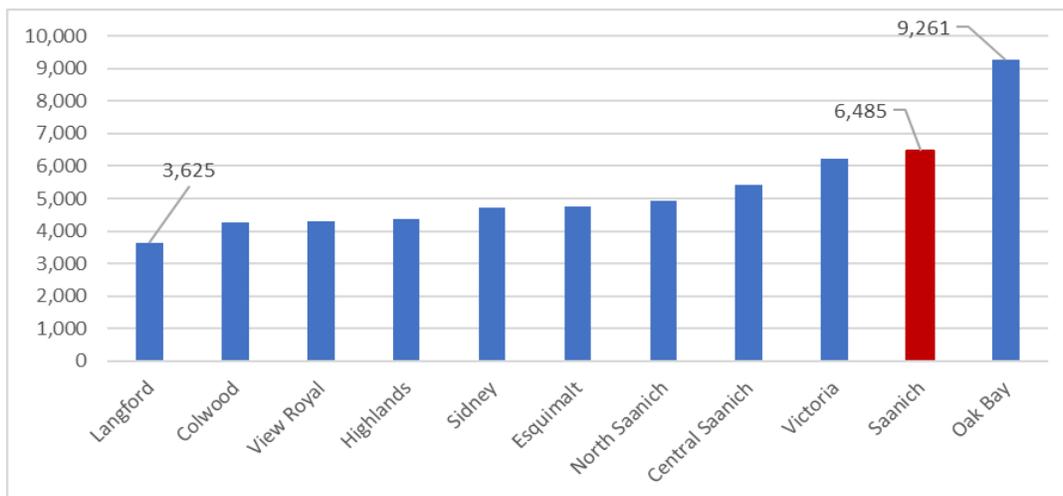
Figure 8 Saanich Tax Charges on A Representative House, 2011 to 2022



Source: Government of BC (2023c)

Saanich ranks among the higher-taxed municipalities in the CRD, exceeded only by Oak Bay in 2022 (Figure 9). By comparison a representative house in Langford pays \$3,625 in taxes and user fees, the lowest in the region.

Figure 9 Total Taxes and User Fees on a Representative House, 2022



Source: Government of BC (2023c)

5.2.4 District Revenues

Table 21 shows that the District collected almost \$235.2 million in taxes and a further \$62.4 million in parcel and utility taxes and user fees, for a total of \$297.6 million in 2022. The District received 64% of these funds for municipal purposes the remainder went to provincial agencies.

Table 21 Saanich Total Taxes and Charges By Tax Category (\$ millions), 2022

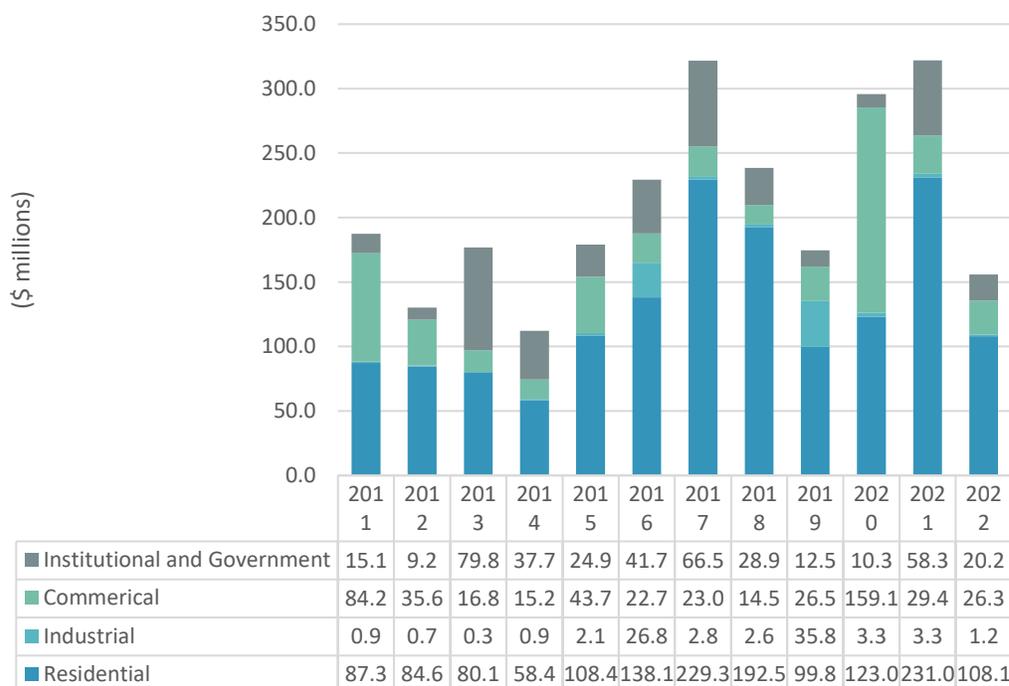
School	General Municipal Total	Regional District	Hospital	GVTA, Victoria Transit	BCA, MFA and Other	Total Variable Rate Taxes	Parcel & Utility Tax	Total User Fees	Total Property Taxes And Charges
56.13	149.93	11.26	6.88	9.20	1.79	235.19	1.49	60.94	297.62

Source: Government of BC (2023d)

5.3 Building Permits

Residential building permit values in Saanich between 2011 and 2022 are shown in Figure 10. Residential activity tends to dominate, but in some years, commercial, industrial and institutional activity can be substantial. The fluctuating annual values are typical of most communities where projects come online in batches rather than as a steady stream.

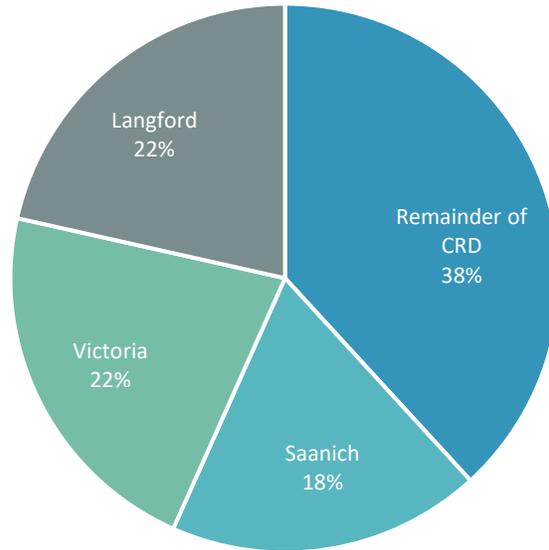
Figure 10 Saanich Building Permit Value, 2011 to 2022 (\$ millions)



Source: Government of BC (2023e)

Saanich accounted for 18% of cumulative building permit values in the CRD between 2011 and 2022 (Figure 11). The leading municipalities were Victoria and Langford who, at 22% share each.

Figure 11 Saanich Building Permits Share By Category, 2011 to 2022



Source: Government of BC (2023e)

5.4 Housing Activity

5.4.1 Housing Inventory

Saanich’s housing inventory over the last 15 years has grown modestly but almost entirely among multi-family residential properties rather than the predominant single detached dwelling stock (Table 22). However, “Apartment or flat in a duplex” is a reference to secondary suites which have experienced significant growth, so while the number of single-detached homes has not increased the number of independent families in that stock has.

Table 22 Saanich Dwellings by Type, 2006-2021

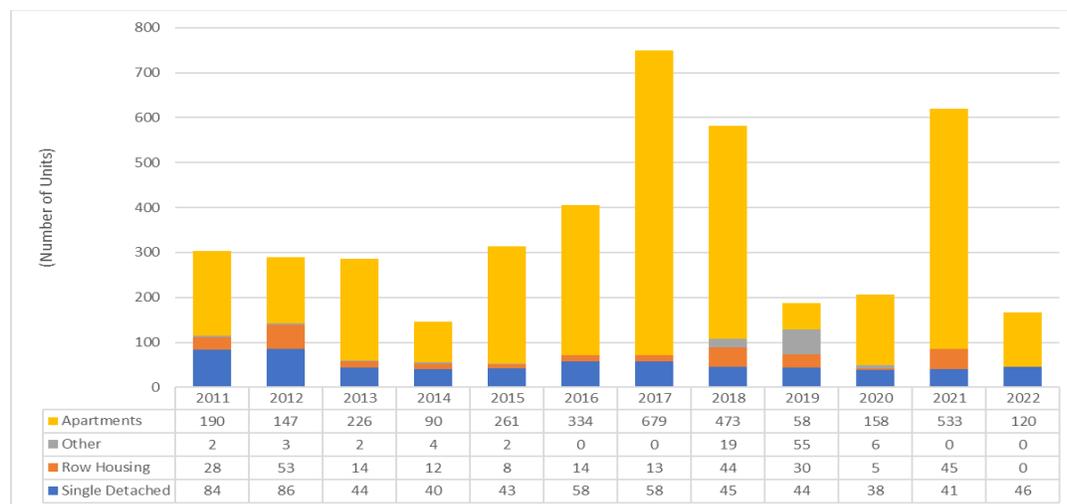
	2006	2011	2016	2021
Single-detached house	22,510	22,820	22,140	22,385
Semi-detached house	1,070	1,190	1,185	1,200
Row house	3,385	3,395	3,505	3,660
Apartment or flat in a duplex	8,780	9,170	10,350	10,350
Apartment in a building that has fewer than five storeys	8,380	8,350	8,845	9,755
Apartment in a building that has five or more storeys	355	380	550	630
Other single-attached house	70	65	65	60
Movable dwelling	20	20	10	10
Total	44,570	45,390	46,650	48,050

Source: Statistics Canada (2007, 2012, 2017, 2022)

5.4.2 Housing Starts

Apartment units drove housing starts between 2011 and 2022, averaging over 270 units annually (Figure 12). Single-detached units represent a distant second, with an average of 52 units being added annually.

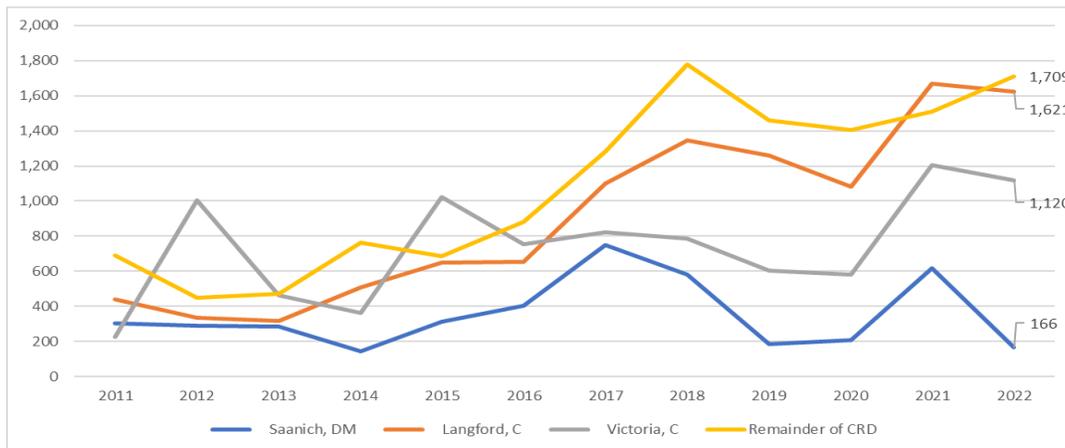
Figure 12 Saanich Housing Unit Starts, 2011 to 2022



Source: Government of BC (2023e)

Saanich has consistently lagged Victoria, Langford and the CRD in housing starts since 2011 (Figure 13). It is true that the Westshore has the advantage of greenfield space to develop new subdivisions, but Victoria although relatively built out has managed to keep pace by densifying its neighbourhoods.

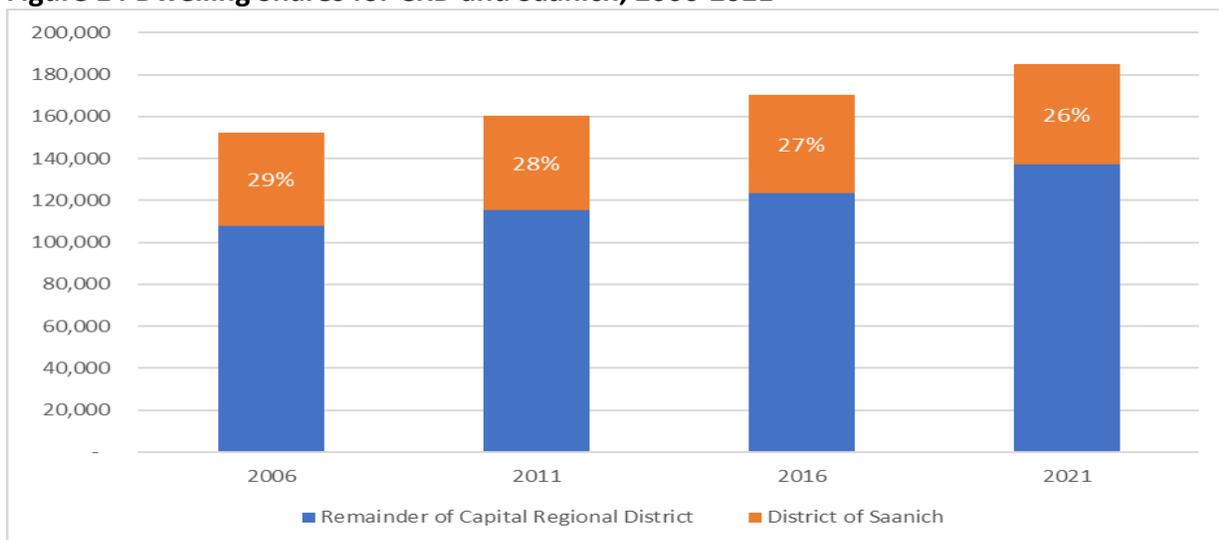
Figure 13 Housing Starts in Select Capital Municipalities, 2011 to 2022



Source: Government of BC (2023e)

Figure 14 compares the share of housing in Saanich with the Capital Regional District (CRD) between 2006 to 2021. It has declined from 29% to 26% and may continue declining based on recent housing starts trends for the region.

Figure 14 Dwelling Shares for CRD and Saanich, 2006-2021



Source: Statistics Canada (2007, 2012, 2017, 2022)

5.5 Real Estate Activity

5.5.1 Office

The office market in Greater Victoria has experienced demand and supply volatility because of the pandemic and the subsequent decision by the Government of British Columbia not to mandate a return to the office for employees. Lease rates are expected to remain stable as new developments and subleasing activity keeps availability high. Demand in Saanich and other suburban areas will remain buoyant as workers seek out shorter commutes when making their employment decisions. Coupled with the lack of available inventory there will be modest upward pressure on lease rates (CBRE 2023). There is roughly 235,000 square feet under construction across the region, most in the downtown. Despite a slow return to office by workers the Victoria market has proven to be one of the most stable in the country, in part because of the high concentration of government occupancy (Colliers 2023a).

5.5.2 Industrial

The Greater Victoria industrial vacancy of 2% continues to be amongst the lowest in the country as demand far outstrips supply. Rental rates are the second highest in the country behind Vancouver. Rising costs and lack of available inventory will continue to place upward pressure on sale and lease values moving forward. New inventory is expected in 2024 with several new industrial strata developments under construction but all are on the Westshore (CBRE 2023). Saanich supplies 19% of all industrial land in Greater Victoria but activity is static. There is no vacant space, no absorption activity and no new supply coming online or in development (Colliers 2023d).

5.5.3 Retail

Retail tenant activity is recovering from the pandemic and remains strong in the region, led by quick-service restaurants and grocery. However, larger spaces in malls and on the street are experiencing softened demand as the return of office workers and foot traffic lags (CBRE 2023). The 185,000 square foot University Heights development in Saanich has begun preleasing. Continued strong demand for shopping centre supply is expected to continue (Colliers 2023a).

5.5.4 Residential

Greater Victoria's rental market is among the tightest in the country with an overall purpose-built rental vacancy rate of 1.5%. In 2022, the Westshore accounted for more than two thirds of new inventory but demand still far outpaces supply. Strong population growth, high construction and mortgage costs and lagging supply is shifting more demand to the rental market. The core of Greater Victoria, including Saanich, had a lower vacancy than the suburban market with rates reported at 1.2% and 1.6% respectively. Demand for rentals is forecasted to remain consistent and strong for the foreseeable future (Colliers 2023a).

Table 23 Greater Victoria Real Estate Market Statistics, 2020-2022

OFFICE				INDUSTRIAL					
	2021	2022	2023F	YoY		2021	2022	2023F	YoY
Downtown									
Inventory (million sq. ft.)	6.49	6.58	6.58	◀▶	Inventory (million sq. ft.)	9.03	9.22	9.51	▲
Vacancy Rate (%)	5.3%	8.0%	9.3%	▲	Availability Rate (%)	1.7%	2.0%	2.7%	▲
Net Absorption (million sq. ft.)	-0.34	0.09	-0.09	◀▶	Net Absorption (million sq. ft.)	0.13	0.16	0.22	▲
New Supply (million sq. ft.)	0.01	0.09	0.00	▼	New Supply (million sq. ft.)	0.03	0.19	0.30	▲
Class A Net Asking Rent (per sq. ft.)	\$30.01	\$25.38	\$24.11	▼	Net Asking Rent (per sq. ft.)	\$16.03	\$17.63	\$18.51	▲
Suburban					Sale Price (per sq. ft.)	\$342	\$380	\$380	◀▶
Inventory (million sq. ft.)	2.51	2.6	2.67	▲	Land Price (per acre, \$ millions)	\$1.90	\$2.00	\$2.00	◀▶
Vacancy Rate (%)	9.6%	7.1%	5.9%	▼					
Net Absorption (million sq. ft.)	-0.15	0.15	0.09	▼	RETAIL				
New Supply (million sq. ft.)	0.09	0.09	0.06	▼	Total Retail Sales per Capita	\$20,722	\$19,189	\$18,781	▼
Class A Net Asking Rent (per sq. ft.)	\$27.54	\$28.64	\$29.21	▲	Total Retail Sales Growth	5.3%	-5.5%	-0.3%	▲
Overall									
Inventory (million sq. ft.)	9.00	9.18	9.25	▲	MULTIFAMILY				
Vacancy Rate (%)	6.5%	7.7%	8.3%	▲	Vacancy Rate	1.0%	1.5%	1.6%	▲
Net Absorption (million sq. ft.)	-0.49	0.06	0.00	▼	2-Bedroom Average Rent	\$1,571	\$1,699	\$1,820	▲
New Supply (million sq. ft.)	0.09	0.19	0.06	▼	New Rental Supply (units)	1,904	897	2,240	▲
Class A Net Asking Rent (per sq. ft.)	\$29.00	\$26.20	\$25.30	▼					

Source: CBRE (2023)

Note: F forecast YoY Year over year

5.5.5 Major Projects Inventory

The provincial major projects inventory lists eight proposed or in-progress developments in Saanich as at October 31, 2022. The total estimated cost is \$468 million, but of the eight only two have commenced construction. Five projects are housing, two municipal infrastructure and one school.

Projects that are proceeding in the municipality but not listed in the table include:

- University Heights (approved development permit) over 500 rentals
- Uptown Residential Tower (approved development permit) over 300 rentals
- 4734 Elk Lake Drive, 11-storey tower –strata market and below market units
- 760 Tolmie (Superstore Mixed use), three towers over 500 rentals
- Fire Station #2 redevelopment (~2024)
- Saanich Operations Centre Redevelopment (~2026)

Table 24 Saanich Major Projects, 2022

Project	Description	Estimated Cost \$millions	Status
École Élémentaire Beausoleil	Proposed elementary school location at the Landsdowne site in Victoria East. Current temporary location is at the Braefoot Elementary school site.	16	Proposed
Central Block Condominium	Development of a 6-storey condominium with 99-units of market housing. Project is located at 1075 Tillicum Road.	20	Proposed
Royal Oak Fire Station Replacement	Proposed 22,000 sq ft replacement of the No 2 fire station located on Royal Oak Dr. Demolition is required prior to construction of the 2-storey mass timber building.	27	Proposed
The Affinity Lowrise Condominium	68-unit condominium in a 5-storey development located at 4024 Shelbourne St.	16	Construction started
Nigel Valley Supportive Housing Development	Phased redevelopment of site bordered by Vernon and Darwin avenues to provide 800-units of complex care and supportive housing. The project partners will develop and operate the facilities, including BC Housing (Bantin Fielding Townhomes), Broadmead Care Society (Nigel House), Island Community Mental Health (Darwin Apartments), the Garth Homer Society (813 Darwin Ave) and the Greater Victoria Housing Society (Nigel Square).	250	Construction started
The Shire Condominiums	Shire on Inverness is a 90-unit development in three 5-storey buildings located on Quadra St.	18	Proposed
Tillicum Towers Residential and Commercial Development	Proposed 300,000 square feet of residential space, overlooking Cuthbert Holmes Park, on the northwest corner of its Tillicum Shopping Centre property. The design concept shows a 296-unit in 9 and 13 storey buildings with 30,000 sq ft of retail space. Project has been approved.	100	Proposed

Source: Government of BC (2022)

5.6 Community Assets

Community Asset Mapping (CAM) identifies assets that support sustainable development. It is based on the principle that individuals in a community or an organization are more likely to maintain momentum and create positive change by focusing on strengths and capacities, rather than deficiencies and problems. Assets are things the community would want to sustain, expand and diversify to ensure wealth and stability for future generations.

Table 25 list assets in Saanich according to three classes, economic, socio-community and natural. Some critical economic assets like the airport, port and BC Ferries terminals are regional infrastructure which leverage core local assets such as the University of Victoria, Camosun College and Highway 17 as a transportation corridor responsible for moving most goods and people to and from Vancouver Island.

Saanich’s socio-community assets include a strong network of neighbourhood associations and other community groups, civic, education and recreation infrastructure and shopping nodes.

Saanich’s natural assets are remarkably diverse (and sensitive) given its relatively small physical footprint. Seventeen watersheds and eight aquifers complement an extensive park and trail system and a tree canopy that covers over a third of the total land area. A 30-kilometre coastal marks the communities eastern boundary with the Salish Sea, while the climate is amongst the rarest in Canada, featuring a warm-summer Mediterranean conditions.

Table 25 Overview of Saanich Economic, Socio-community and Natural Assets

Economic	Socio-community	Natural
<ul style="list-style-type: none"> • Highway 17 (Patricia Bay) • Victoria International Airport** • BC Ferries Swartz Bay** • Port of Victoria** • University of Victoria • Camosun College • Vancouver Island Regional Correctional Centre • Vancouver Island Tech. Park • VIATEC** • Cadboro Bay, Royal Oak BIAs • Business establishments (3,590) • Pacific Institute for Sports Education • Employment land • Zoned Farmland (2,222 ha) • Farms* (221) 	<ul style="list-style-type: none"> • Civic buildings (5) • Hospitals (2) • Community halls (2) • Fire halls (3) • Schools K-12 (18) • Libraries (4) • Police (1) • Recreation centres (4) • Bikelanes (188 km) • Sport venues/facilities (190+) • Neighbourhood associations (15) • Faith organizations (27) • Heritage sites (303) • Boat launches (1) • Shopping nodes (6) • Golf Courses (5) 	<ul style="list-style-type: none"> • Location • Climate (warm-summer Mediterranean) • Land area (103 km²) • Lakes (8.2 km²) • Parks (168) (8.2 km²) • Coastline (29.6 km) • Highest elevation (229 metres) • Tree canopy/land area (36%) • Watersheds (17) • Aquifers (8) • Gardens, horticultural spaces (500+) • Trails (100+ km) • Agriculture Land Reserve (1,843 ha)

Source: Internet websites, District of Saanich (2023)

Notes: * 2021 ** located in adjacent municipalities VIATEC Victoria Innovation, Advanced Technology & Entrepreneurship Council

6 Key Economic Development Trends

6.1 Economic

Inflation and recession – Governments and central banks continue to closely monitor and adjust for inflation risks. Covid-related stimulus spending by governments and consumers has contributed to inflation and supply bottlenecks. Rapidly rising interest rates imply that central banks believe high inflation could become entrenched, especially if the labour market continues to exhibit full employment. As business investment and consumer spending slows and real estate markets retract, recessionary conditions are likely to set in. The World Bank’s latest *Global Economic Prospects* report projects a deteriorating global growth outlook, with a downturn that is both widespread and long-lasting (World Bank 2023a).

Supply chain rebalancing – Every industry is evaluating and rebalancing supply chains because of short-term impacts from Covid and the long-term effects of over-reliance on and vulnerability to leading exporters. The Ukraine war is also a factor in some commodity markets. Supply chain issues and global trade tensions are spurring onshoring and nearshoring of industrial and manufacturing facilities. According to McKinsey, a consultancy, as much as a quarter of global goods exports, or \$4.5 trillion, could shift by 2025 (McKinsey 2021). Opportunities for more domestic participants in national and North American supply chains will continue to emerge.

The Gig Economy – The COVID-19 pandemic has led to an increase in the number of Canadians who participate in short-term contracts or freelance work, such as rideshare drivers, freelance writers and graphic designers, software engineers or contractors active in many different industries. These gig workers now represent more than one in 10 Canadian adults (13 per cent), and more than one in three Canadian businesses (37 per cent) employ gig workers (Payments Canada 2021). The gig economy has decentralized places of employment and encouraged employers to be more flexible in their hiring and recruitment policies.

Labour Markets – The automation and digitalization of the workforce was well under way when the Covid-19 pandemic struck and has accelerated since. Businesses are better prepared and more resilient today than three years ago when it comes to hiring and retaining talent, while workers have more opportunities than ever, even as highly automatable jobs decline. However, there remains a significant gap in labour market performance with the unemployed and under-employed less able to participate in higher-skill and higher-pay jobs. Economic development organizations, workforce organizations, education and training providers, businesses and government have important roles to play in closing this gap (IEDC 2021).

Land and Building Availability – Availability of land/buildings is one of the most important criteria used by site selection professionals in locating business operations (ACCE 2022). In the retail and commercial space, despite the rise of e-commerce during the pandemic, shoppers are

returning to physical stores and seeking experiences not available online. In industrial, the third-party logistics industry is expected to continue driving demand as more companies look to outsource their supply chain processes. Many industries and companies are evaluating their office space needs in a post-pandemic era of office flexibility, hybrid options and work-from-home opportunities. Some workers will return to the office while others may not entirely or only partially. This will have an impact on total office space demand and place a premium on modern, flexible workspaces. Highly differentiated office space will do better than commodity space, keeping vacancy rates elevated amongst older, less flexible building types (CBRE 2023).

Technology – The adoption and use of new technologies is accelerating across the human landscape from consumers and businesses to governments and institutions. Artificial intelligence has moved from the fringes to everyday use in nearly every job in every business process across industries. Augmented reality and virtual reality continue to advance, offering more immersive meeting environments where people can talk, brainstorm, and co-create. Blockchain technology will progress as companies create more decentralized products and services, including decentralized data storage and encryption as a safer alternative to cloud services. Digital twinning allows engineers to test concepts and innovations virtually then create them in the real-world using 3D printing technology. Nature is becoming “editable” through gene editing to correct DNA mutations, solve the problem of food allergies, increase the health of crops, or even edit human characteristics. Other developing technologies that are fundamentally affecting economic activity include quantum computer, green technologies such as green hydrogen, robotics, autonomous systems and factories, and sustainable technologies that underlie the circular economy (Marr 2022)

6.2 Social

Deurbanization and a World of Mobile Talent – There has never been a better time for smaller cities and regions to compete for investment and talent attraction, because of technology. It has levelled the playing field and stimulated ‘deurbanization’ of the world’s mega cities, which struggle to cope with urbanization impacts like affordability and unsustainable growth. In the US, LinkedIn found that in 2020 mobile workers were leaving major tech centres like San Francisco, Chicago, Boston and New York for mid-sized cities like Madison, Cleveland, Sacramento and Hartford. Stats Canada has reported that in 2021 Montreal and Toronto lost population as residents chose smaller cities like Kitchener-Waterloo, Kelowna, and Saskatoon for reasons of personal health, ability to work remotely and more affordable housing costs. In rural British Columbia, smaller regions are also seeing new residents that are mobile, with remote workers making lifestyle choices that prioritize safety, security, affordability and recreation.

Demographic change – The effects of demographic change are manifested in many ways, most obviously in a rising average population age and corresponding decline in labour force participation. Heightened generational differences in work attitudes and expectations are

clearly emerging as baby boomers leave the labour market and Millennials take their place. In Canada, increasing immigration and immigrant labour force share are affecting workplace planning, practices and productivity.

Health and wellness – Consumers are spending more on wellness than they have in the past with an estimated global market of \$1.5 trillion in 2021 (McKinsey 2021a). Consumers are increasingly interested in health, fitness, nutrition, appearance, sleep, and mindfulness. From an investment attraction and economic development perspective, health and wellness has much common ground with health care (mental health treatments, healing circles, diet and lifestyle programs), tourism (e.g., spas, retreats, micro workouts) biotechnology (e.g., digital platforms, laser therapy, skincare) and agri-food (e.g., wild foods, mushrooms, nutraceuticals, homeopathy) to name a few.

Covid and the emergence of new variants – Covid continues to disrupt the global economy despite the wide availability of vaccines. New variants are keeping case numbers high in some countries and could result in reimposed public health restrictions should new waves occur. The emergence of other pandemics is a matter of time.

Housing and homelessness – In Canada, housing affordability has eroded to its worst level in over 30 years, leaving renting as the only viable housing option for an increasing number of Canadian families. In many communities, owned housing is simply out of reach for many. This has fundamental implications for the labour supply of the future, particularly in lower skill and lower pay sectors of the economy. Homelessness is associated with poorer socio-economic and quality of life outcomes, especially among the most vulnerable. What used to be an occasional occurrence appears to have become endemic across the developed world.

Food Production, Security and Feeding the World – Worldwide food production must increase by at least 60 per cent to feed 10 billion people by 2050, according to the Federation of Agriculture Organizations of the United Nations. Canada is one of the world’s largest agricultural producers and exporters and has opportunities to expand its production and export base. But the only way food production will meet domestic and export demand is through technology and innovation. This means producing more food, more efficiently, on less land. It also means leveraging technologies and digital systems. SmartAg, smart farms and smart foods that connect to smart networks are helping farmers with everything from fungicide application and production gains, to monitoring soil moisture for optimum crop production and rotation. Vertical farm models offer potential solutions to serving dense populations. With shrinking land bases and increasing demand for safe, reliable food, innovation is the only way to feed the world over the next 50 years.

6.3 Environmental

Sustainability – Concerns that globalization and growth may be exceeding the earth’s bio-capacity have been around for decades. This has generated more interest in sustainable

development practices, from rethinking the built environment and our use of water, transportation, energy, and materials, to addressing inequality and poverty reduction and pursuit of a green economy. In a recent sustainability action report, Deloitte reported that nearly three in five executives reported having implemented a cross-functional environmental, social and governance (ESG) working group to drive sustainability policy and practice. The other two were taking steps to do so (Deloitte 2022). In increasing numbers, companies and executives are prepared to measure and disclose GHG emissions. The challenge today is enhancing the standardization, accuracy and completeness of sustainability data.

Climate Change – Climate change is here to stay. Extreme weather conditions are increasing in frequency and severity, with implications for all areas of the economy, especially agriculture and food production. In Canada, droughts, wildfires and floods are adversely affecting production of the top agricultural exports, and other resource activities. Climate change is affecting economic sectors differently, but nearly all will experience disruption of business models and supply chains at some point owing to resource scarcity, regulatory and political uncertainty, mitigation and insurance costs and adoption of ESG principles (IEDC 2022). Municipalities are on the front lines of climate change, having to deal with outcomes arising from forest fires to ice storms to rising sea levels and flooding. Studies have shown that investments in resilient infrastructure have a return on investment of \$6 in future averted losses for every \$1 spent proactively (FCM 2020). Those investments are critical to helping local communities adapt to the changing climate. In respect of the practice of economic development, there will be opportunities to access federal and provincial dollars to mitigate risks, improve economic assets and strengthen climate change resiliency through robust supply chains, institutional and technological assets and supportive public policies.

Decarbonization – Canada has joined over 120 countries in committing to be net-zero emissions by 2050, via the *Canadian Net-Zero Emissions Accountability Act*. This builds on the renewed climate plan (2020), the Pan-Canadian Framework (2016) and the 2030 Emissions Reduction Plan (2022). Recent intervention mechanisms leverage Canada’s carbon pricing program and its commitment to a net-zero grid by 2035. Canada’s Carbon Capture Industrial Strategy seeks to store 15 million tons of carbon dioxide per year by 2030. The transition to net zero will drive significant change in Canada’s economy, posing challenges for some regions and sectors while also creating new opportunities. Climate-focused boards, ESG funds, ESG ratings, climate target disclosure standards, climate stress test standards, and new frontiers in measurement and transparency will push decarbonization as a key influencer of investment and deal flow.

The Expansion of Cleantech – In Canada, all levels of government have committed to climate action and adopted a range of targets and programs for lowering carbon emissions. The Pan-Canadian Framework on Clean Growth and Climate Change covers actions to accelerate innovation, support cleantech, and create jobs. Carbon pricing, emissions reductions, adaptation and mitigation, and new technologies are all being investigated and promoted.

Cleantech activities in Canada generated \$67 billion in GDP (4% of the total) in 2020 and 341,000 jobs. Over the next decade an estimated 500,000 Canadians will work in cleantech subsectors and contribute substantially to exports of related products and services. Bioenergy using waste feedstocks like forestry, agriculture and municipal waste as well as renewable energy is encouraging ongoing innovation in cleantech.

The Blue Economy and Ocean Security – The Blue Economy is defined by the World Bank as the sustainable use of ocean resources for economic growth, improved livelihoods and jobs, as well as ocean ecosystem health (World Bank 2023b). Canada’s Blue Economy accounts for close to 300,000 jobs in Canada and contributes almost \$32 billion in GDP (Government of Canada 2020). The Blue Economy Strategy for Canada will shift and enable resources towards the protection of ocean wealth. This will be especially important in areas under increasing threat from global warming from rising water levels to impacted fish stocks and marine health. For coastal cities, identifying and actively engaging with Blue Economy opportunities, innovations and investments could support growth and diversification.

6.4 Implications for Economic Development

The above trends affect the practice of economic development and a community’s competitiveness as an investment destination in the following ways:

- De-risking supply chains by re-shoring, near shoring and stabilizing logistics;
- Weakened influence of world trade organizations and their ability to resolve global trade issues – reinforcing regionalized trade security;
- Regionalized manufacturing strategies with smaller clusters of value-chain participants and smaller manufacturing plants better scaled to regional market size;
- Strategic commodities sourced closer to home markets;
- Increased automation, less reliance on low-cost manual labour, but increased demand for higher-paying skilled labour;
- Nimble manufacturing production with shorter runs and the ability to retool for a variety of production needs/opportunities;
- Accelerated redistribution of technology companies;
- Overhaul of workforce management and rise of distance workforce management;
- Companies and consumers willing to pay more for better food, better health care and reduced health risk;
- The acceleration of Millennials moving to smaller cities and regions with shrinking interest in materialistic purchasing; and
- Safety, security and quality of life as increasingly important decision-making factors in attracting tech talent and entrepreneurs.

Amid the increasing pace of economic, social and environmental change, Saanich will be challenged to maintain its employment, household income and community prosperity. An

emphasis on local policies that encourage and reward strategic land and building use, open innovation, knowledge-based economic activity and a skilled, adaptable workforce that will supply the job demand of the future will be required. Greater collaboration at the business and institutional level would be a start. Building an innovation ecosystem that envelops our key sectors and community leaders would be another.

7 What We Heard

7.1 Citizen and Business Survey

BC Stats administered, on behalf of the District, the Citizen and Business online surveys between October 24 and November 27, 2022 (BC Stats 2023). The full report can be found on the District’s [website](#). The following is a high-level overview of the survey results (Table 26).

Table 26 Citizen and Business Survey Highlights

Citizen Survey	
Most important issues	<ul style="list-style-type: none"> • 37% affordability • 32% transportation and infrastructure • 20% planning and development
Business Survey	
Business environment and business services	<ul style="list-style-type: none"> • 70% Saanich is a good place to operate a businesses • 45% Saanich’s regulatory environment was fair to businesses • 76% Location is the most positive factor keeping businesses in Saanich • The biggest challenges for the next five years: <ul style="list-style-type: none"> - 47% transportation and infrastructure - 37% affordability - 24% community, development, demographics, and population growth • 58% Satisfied with the overall service received from Saanich • 62% Largely satisfied with the overall level of services provided by Saanich • 61% Largely satisfied with the overall quality of services provided by Saanich
Goals	<ul style="list-style-type: none"> • 90% retain existing businesses • 88% build a safe and healthy community • 81% improve attraction and retention of workforce • 80% encourage entrepreneurs and start-ups • 80% improve housing affordability

7.2 Community Survey

An online community survey was undertaken for four weeks between mid February and mid March, 2023 to obtain input on matters of community and economic development. A total of 1,338 responses were received. Full results can be found in Appendix A. Respondents were diversified in terms of age, neighbourhood and length of residency. Survey highlights (based on the frequency of mentions for open-ended questions) are shown in Table 28.

Table 27 Community Survey Highlights

Why do you live in Saanich?	17% housing availability 16% work opportunity 15% being near family and friends 14% grew up in Saanich 14% overall quality of life	
How would you like to see the local economy change?	41% grow and diversity 33% diversify (growth is secondary) 16% grow 10% stay the same	
Strengths	<ul style="list-style-type: none"> • Agriculture • Accessibility of services • Central location • Quality of life • Diverse business base 	<ul style="list-style-type: none"> • University of Victoria • Education services • Environment, green spaces • Safe, low crime • Stable economy
Challenges	<ul style="list-style-type: none"> • Affordable housing • Homelessness • Inflation, cost of living • Household incomes • Transit, roads, congestion 	<ul style="list-style-type: none"> • Diversifying the economy • Land/buildings for business • Walkability • Malls, strip malls • No defined downtown
Economic Development Goals	1 Build a safe and healthy community 2 Improve housing availability and diversity 3 Retain businesses 4 Improve household incomes 5 Encourage entrepreneurship	
General Comments	<ul style="list-style-type: none"> • Diversify the economy • Balance development with preservation of environment • Economic development with a triple bottom line • Manage residential—commercial/industrial interface • Need for sustainability • Need for talent attraction, entrepreneurship • Need for affordable housing • Reduction of red tape, enhance business climate • Building walkable neighbourhoods • Densify—Do not Densify 	

7.3 Focus Groups

Fifty-one participants sat in one of six focus groups on February 28 and March 1, 2023 at the Cedar Hills Golf Course. Highlights for each session are shown in Table 28.

Table 28 Focus Group Highlights

Agriculture	Strengths	<ul style="list-style-type: none"> • Favourable growing season • Good soil conditions • Agricultural land reserve • High local demand • Diversity of crops • Local supply chain in place
	Challenges	<ul style="list-style-type: none"> • Small lots, small-scale producers, low productivity • Many ALR areas are “protected” from agriculture • Access to labour • Rising business costs = rising prices • Loss of local abattoirs • Climate change, food security
	Opportunities	<ul style="list-style-type: none"> • Eat/grow local education and awareness • Farm and food land trust • Brokers, land matching • Food to table initiatives • Agri-tourism • Farmers’ institute, knowledge base, network/ecosystem • Intensive production and innovation (on-land aquaculture, greenhouses)
Education	Strengths	<ul style="list-style-type: none"> • Post-secondary education capacity <ul style="list-style-type: none"> - University of Victoria - Camosun College - Royal Roads University (regional) • International students • Research facilities • Vancouver Island Technology Park
	Challenges	<ul style="list-style-type: none"> • Need to ramp up innovation • Cost of living and housing • Staff and faculty recruitment • Slow planning and permitting processes • NIMBYISM
	Opportunities	<ul style="list-style-type: none"> • Identify and promote economic impacts of the sector • Land development to address housing and new facilities • Coordinated planning with municipality • Create and celebrate a vision for Saanich as “Education Town” • Film and studio production • Student retention programs (to enhance local labour supply) • Indigenous economic development

Tourism	Strengths	<ul style="list-style-type: none"> • Safe communities outside of Victoria downtown • Growing retirement community, demographics are shifting • Greenspace • Good transport access, highways, airport, ferries • Bike lanes and trails (Gallopig Goose) • Accessible outdoors • 15 minutes from downtown • UVIC and Camosun (as demand generators) • Glendale gardens • Leadership and programs of Destination Greater Victoria
	Challenges	<ul style="list-style-type: none"> • Housing costs and homelessness • Transit services, poor connectivity for visitors without cars • Declining access from US markets • Access to labour • Short-term rental impacts on hotels and housing • Challenging zoning bylaws, permitting times, high costs of development • Lack of accommodation properties
	Opportunities	<ul style="list-style-type: none"> • Transit services and transportation infrastructure • Affordable housing • Hotels, accommodation strategy to address all price points • Agri-tourism, farm to table experiences, garden tourism • Sport tourism • Understanding tourism impacts of all infrastructure investments • Education/awareness of how tourism works and its impacts • Participate in Destination Greater Victoria master planning
General Business	Strengths	<ul style="list-style-type: none"> • Lifestyle • Climate, landscape, ocean, lakes • Retirees from the prairies • Compact, concentrated, connected • Airport and ferry services • Incubation centres and hubs
	Challenges	<ul style="list-style-type: none"> • Affordability • Labour supply • Lack of in migrating youth • Transportation and transit • Balkanization of the CRD, NIMBYism • Saanich was built for horse and buggy and is still managed that way • Lack of land/building supply/options
	Opportunities	<ul style="list-style-type: none"> • Densification • Education sector • Film sector • Vertical farming • Tech and export sectors • Light rail from downtown to uptown • Food industry, smartag, microbreweries, distilleries • Succession plan for young agrarians • 15-minute neighbourhoods

Development	Strengths	<ul style="list-style-type: none"> • Location • Local demand/market • Desirable community, high quality of life • Academic institutions a major economic driver and land developer • UVic creates demand for housing and subdivisions
	Challenges	<ul style="list-style-type: none"> • Lack of vision • Long permitting times • Many municipalities in a very small metro area • Exclusionary neighbourhoods • No defined economic districts • High business costs, bylaws add up to 30% of overall costs • Decentralization of our land use is harming the region • Poor transit services • NIMBYism • Unproductive and unused ALR • Warehousing and storage space
	Opportunities	<ul style="list-style-type: none"> • Implementation of KPMG strategy • Amalgamation of all or some municipalities in CRD • UVIC land development • Reduced permitting times and costs, set benchmarks and targets • Remove marginal land (Class 4) from ALR • Office, health care, services to accommodate new residents • Densification to accommodate the ALR • Transportation infrastructure, light rail

Technology	Strengths	<ul style="list-style-type: none"> • Small but growing sector • Many biotech startups • Vibrant local networking • Cost of living advantage over Vancouver • Quality of life – we punch above our weight because people want to live here • UVIC is a high-ranking comprehensive university, lends itself to many different growth areas
	Challenges	<ul style="list-style-type: none"> • Small ecosystem, no cluster effects • Growth very uneven • Reorienting supply chains for technology inputs • Transit and transportation • Too reliant on natural advantages • Not working hard enough to take risks and earn investment • Not enough intensive land uses (residential, employment) • Not well known or promoted to the public as a sector • Labour supply (young people can't afford to live here) • Low commercial and industrial real estate vacancies, little supply coming on board • accommodating tech companies whose production activities do not match outdated zoning
	Opportunities	<ul style="list-style-type: none"> • Small-scale manufacturing targeting local supply chain gaps • Ocean sciences • Clean tech • SmartAg • Biomanufacturing site/incubator to help scale development • Recruitment of young talent to the community

8 Strengths, Challenges and Opportunities

Saanich's economic strengths come from its natural endowments, economic diversity, access to economic infrastructure and a safe and secure community. An attractive climate and marine environment with access to BC's major population centres draws in residents and business investment. The economic base is spread across goods and services production while a cluster of post secondary institutions boost the economy by investing in human capital, research and development capacity and innovation. Saanich has two major post-secondary institutions and private organizations like the Pacific Institute for Sport Education that could be the base for innovation and cluster development. There is burgeoning life sciences sector and a committed agricultural community both with expanding local ecosystems.

As the average age in Saanich continues to increase, labour force participation rates are declining, as is the ratio of jobs to population. An accessible, quality labour supply will be needed to keep businesses and public services going in the future. This will have implications for housing and transportation services to ensure labour mobility is flexible and response to regional demand. Saanich has made a commitment to preserve and protect its green belt and abides by the Regional Growth Strategy directive regarding the urban containment boundary. At the same time, the agricultural land reserve prevents uses of the land (including agriculture) that could alleviate the municipality's growth constraints. Collectively, these forces increase friction between competing residential and commercial users and with existing neighbourhoods and commercial areas that fear change. In this environment, densification and infill strategies become more difficult to implement.

The opportunities for Saanich are in three key areas:

- the knowledge, technology (life sciences, biotechnology, health) and creative sectors (film, media) where future job growth will be concentrated and where the community already has solid foundations and building blocks;
- traditional sectors like agri-food focused on intensive, tech-based practices in an urban environment and tourism that leverages the region's natural resources, access to nature, coastline and recreational resources; and
- innovations in land use and critical infrastructure like housing, transit, uptown development and cleantech solutions to net-zero and decarbonization commitments, all having potentially strong synergistic effects on attracting the talent and investment that will drive economic prosperity and wellbeing in the future.

Strengths	Challenges	Opportunities
<p>Climate</p> <p>Environment</p> <p>Location</p> <p>Local market size</p> <p>Economically diverse</p> <p>Quality infrastructure</p> <p>Higher education ecosystem</p> <p>Safe, low crime rate</p>	<p>Aging population</p> <p>Low participation rate</p> <p>Constrained land base</p> <p>Attainable housing</p> <p>No defined downtown</p> <p>Growth pressures</p> <p>Transit services</p> <p>Low awareness as a destination</p>	<p>Education</p> <p>Professional/technical services</p> <p>Agriculture</p> <p>Tourism</p> <p>Life sciences</p> <p>Health and wellness</p> <p>Uptown development</p> <p>Innovative housing</p>

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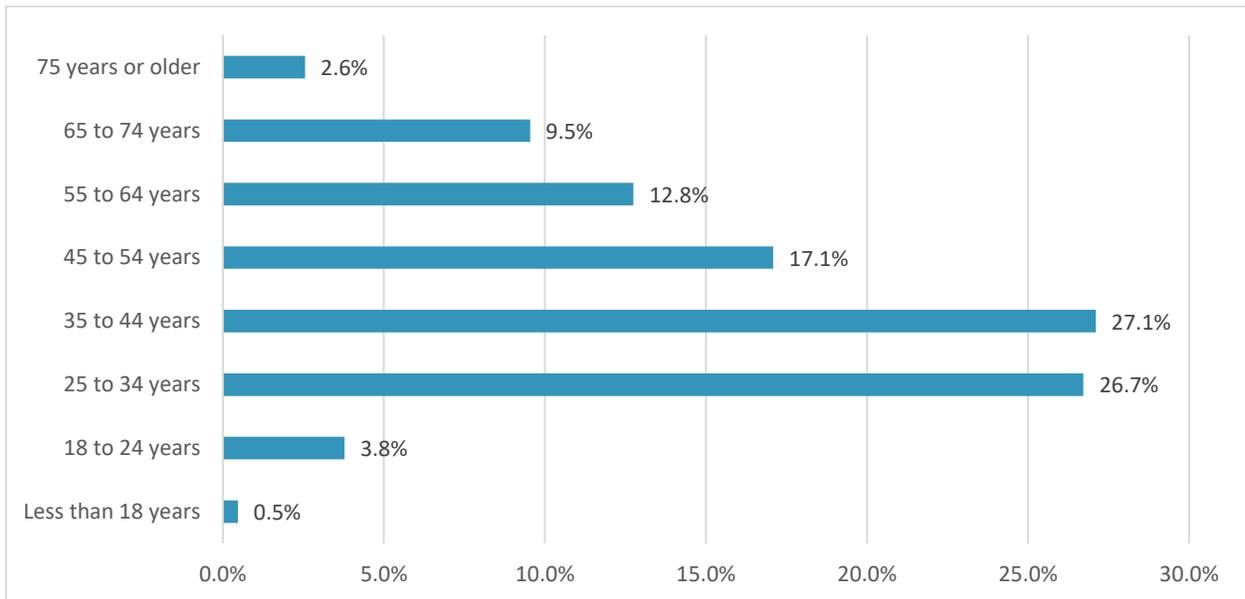
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10 Appendix A - Community Survey Results

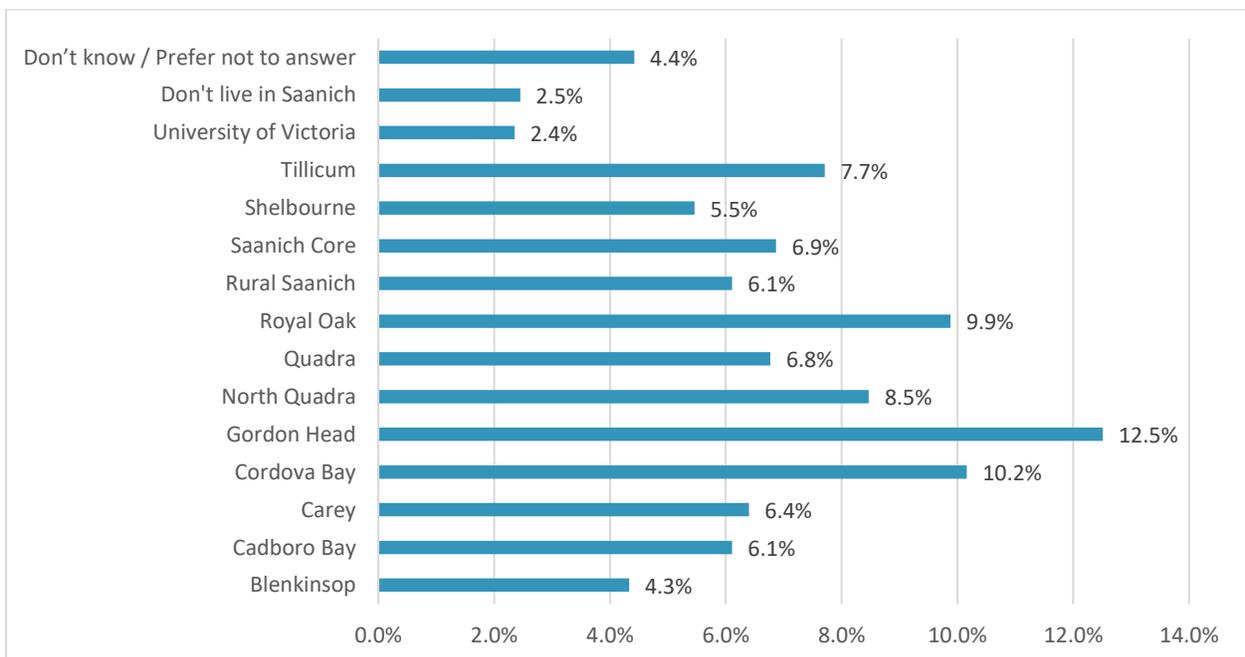
Question 1 – What is your age?

The figure below highlights the age of survey participants.



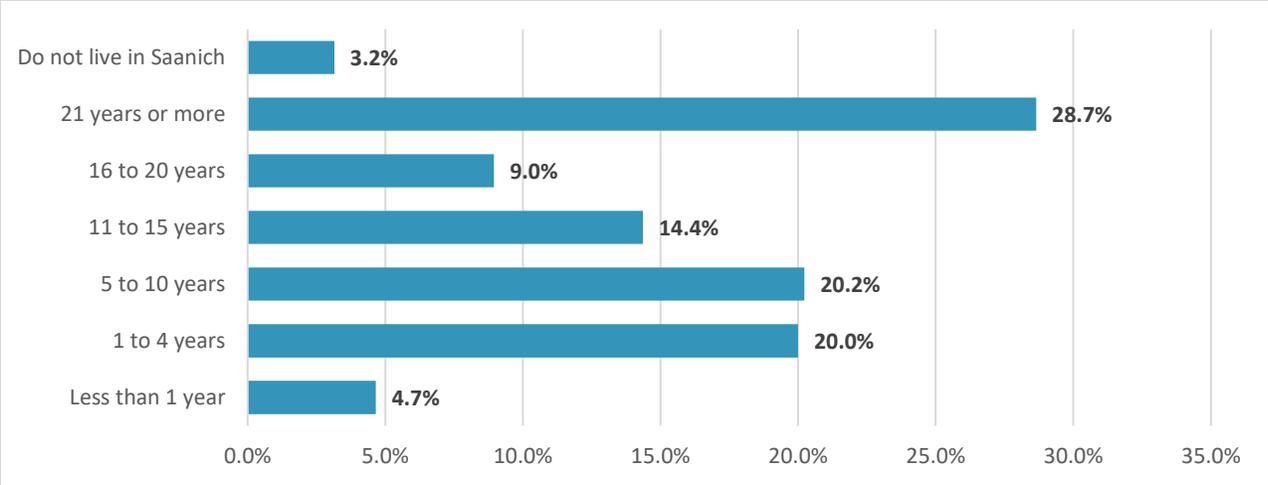
Question 1 – What neighbourhood do live in?

As illustrated in the figure below the largest number of survey participants identified Gordon Head as their neighbourhood, followed by Cordova Bay.



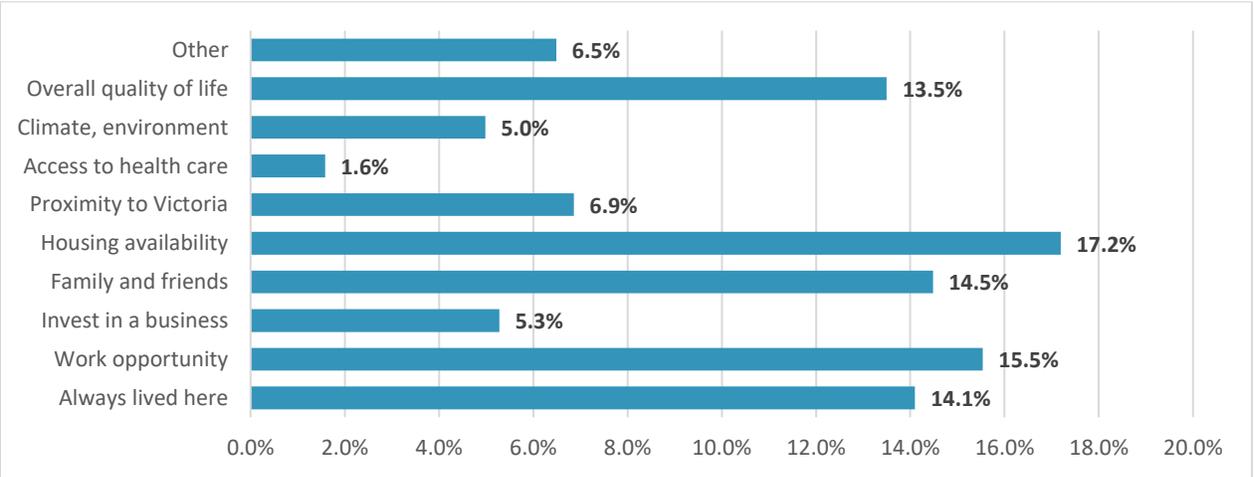
Question 3 - How many years have you lived in the District of Saanich?

There were a total of 1,338 respondents to the survey with 1,330 respondents completing this question. As illustrated below, approximately 45% of respondents have been in the District of Saanich 10 years or less, while 52% have been here more than 11 years.



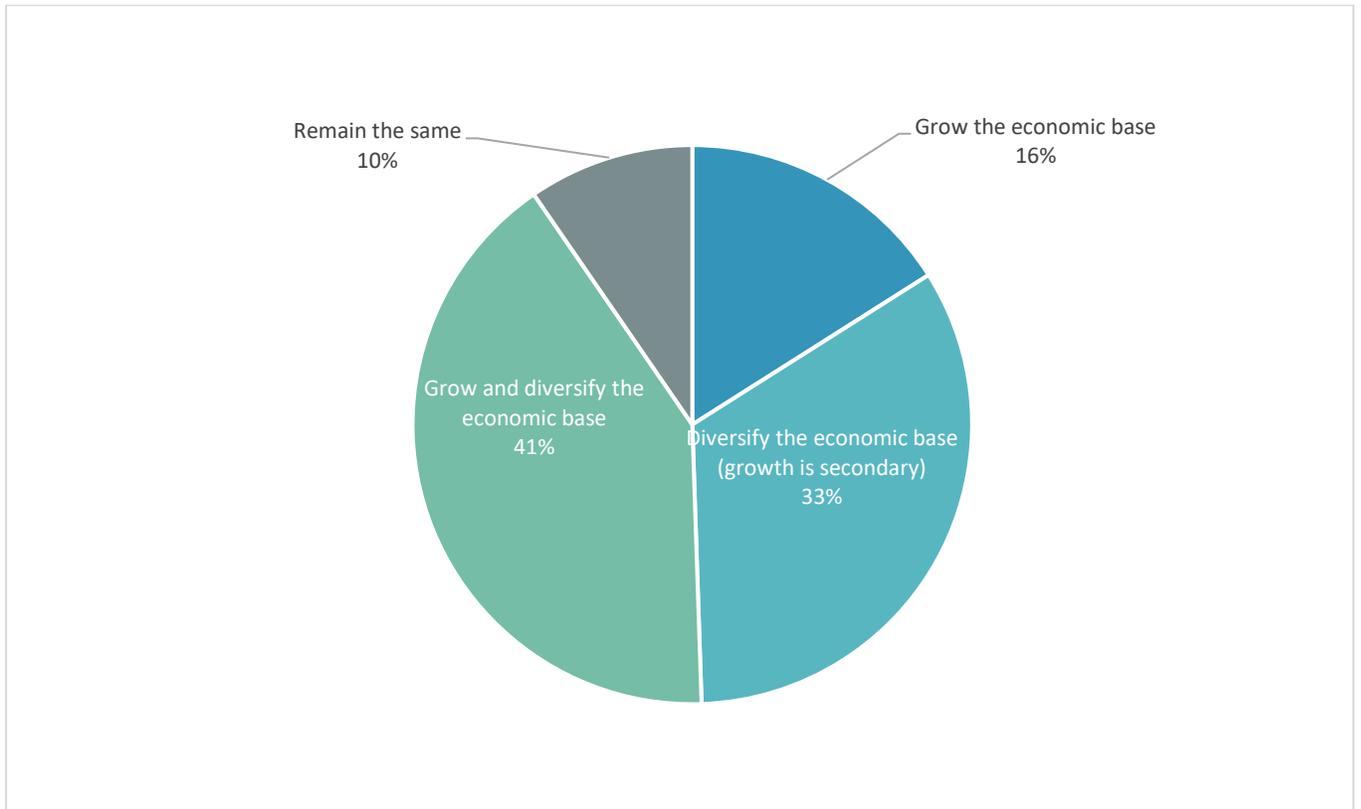
Question 4 - Please tell us why you chose to reside in or move to the community. Select the response that most greatly influenced your decision.

Of the 1,338 respondents, a total of 1,326 completed this question. Housing availability and work opportunity were the two most frequent reasons for living in Saanich. Having always lived in the District of Saanich was also a response of 14.1% of respondents.



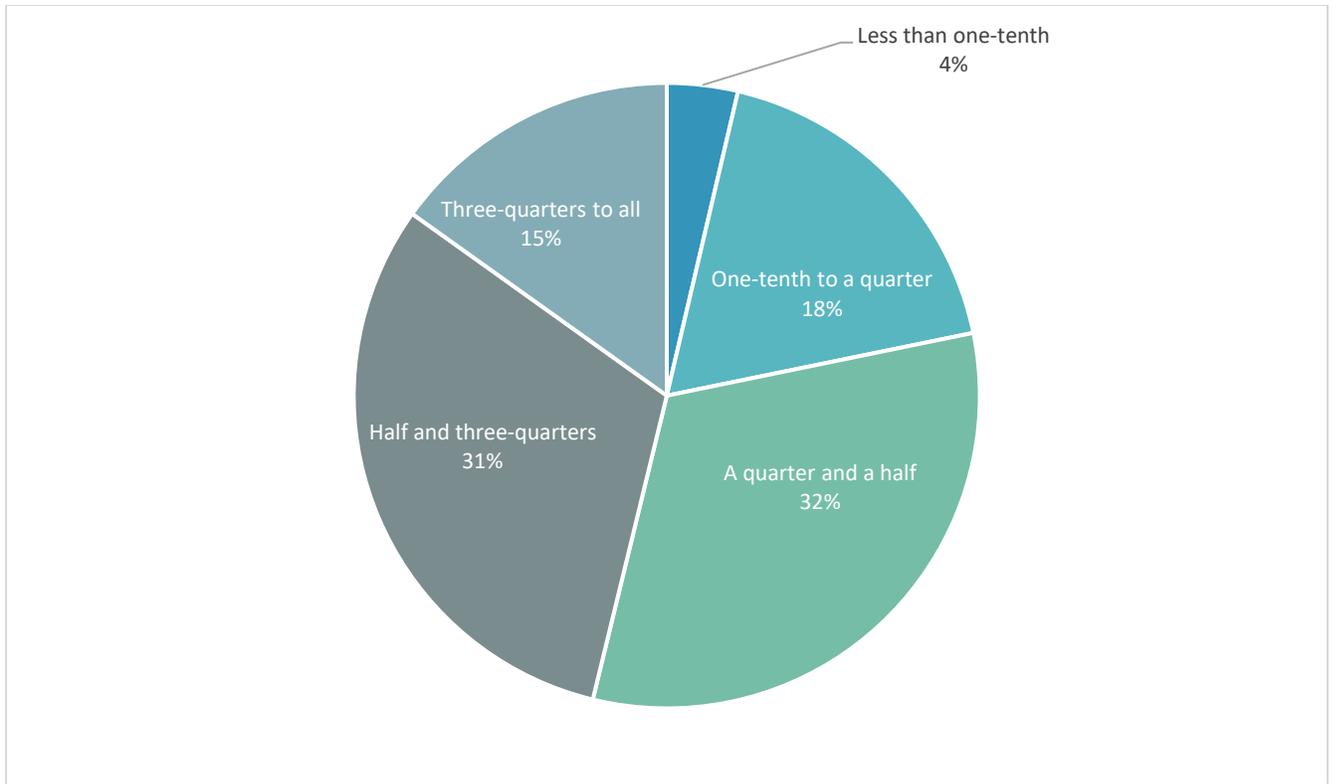
Question 5 – How would you like to see the local economy change in the future?

A total of 1,324 completed this question. Overall, respondents want to see the economic base grow and diversify (41%) while a further 33% want to see the diversification of the economic base without focusing on growth.



Question 6 – What portion of your household purchases are made within the District of Saanich?

Of the 1,338 respondents, a total of 1,065 completed this question. As illustrated below most residents (63%) purchase between a quarter and three-quarters of all their purchase within the District of Saanich. Only 4% purchase less than one-tenth of their purchases from within the District of Saanich.



Question 7 – What are the greatest economic strengths of the community?

Of the 1,338 respondents, a total of 687 completed this question. A sampling of the responses is provided below.

Educational advantage	Broad tax base
Developer strength	Broadmead/Royal Oak shopping
2 shopping centres to choose from	Build a safe and healthy community
A large number of talents	Build a safe and healthy community
A nice place to live.	Bus routes
A stable well-educated population	Camosun College and university education
A variety of shopping nodes	Can walk streets safely

A wealthy local population who earn in Victoria	Careful planning
Abundant educational resources	Central location
Access to health care and recreation	cheaper rent
Access to local agriculture and the agri-tourism opportunities	Clean streets parks and green spaces
access to services/schools/stores/healthcare etc.	Close proximity to highways/airport/harbour/ferries
Access to Victoria	Community services to children and adolescents
Accessibility	Day to day amenities are close by in our communities (groceries, gas, bakeries...).
accessible grocery stores	Diverse business community that drives the economy and accommodates daily needs and provides work.
Accessible, free parking in many locations	diverse employment
Affordable recreation	Diverse landscape. We have urban and rural and everything in between
Affordability, compared to Victoria	Diversified housing options
agricultural land and enterprises	Easy access to locally grown food
Agriculture is developing well	Easy to get most essentials in community. Not a lot of driving
Agri-food	Educated population
Almost Everything you need is in Saanich	Environment is attractive
Ambience	Excellent quality of life
Ample space (land, resources and intangible like researchers/artists) to develop local economy	Family orientated
anyone who could afford a \$250,000 home in the 2000s is now an on-paper millionaire	Farm markets like Galeys Farm for local produce
Attractive streets	Feeling safe doing everything in Saanich
Availability of basic services	Good light industry
Availability of businesses	Good neighborhood parks/trails
Availability of groceries/essentials	Has both urban and rural areas, supporting diverse businesses and neighborhoods
Availability of independent grocers	I live in a community (uptown) where I can walk or bike for most needs to be purchase
Availability of stores	Independently owned businesses have remained here
Availability of variety of services	Job opportunities are high
Be safe in the community	Land area for growth
Beaches	Parks - and access to oceans and lakes
Beautiful environment	Sports and fitness facilities are very perfect
Beautiful environmental resources are conducive to the development of tourism	The people
Bicycle infrastructure	The University and the College and VITech Park

Question 8 – What are the greatest economic challenges facing the community?

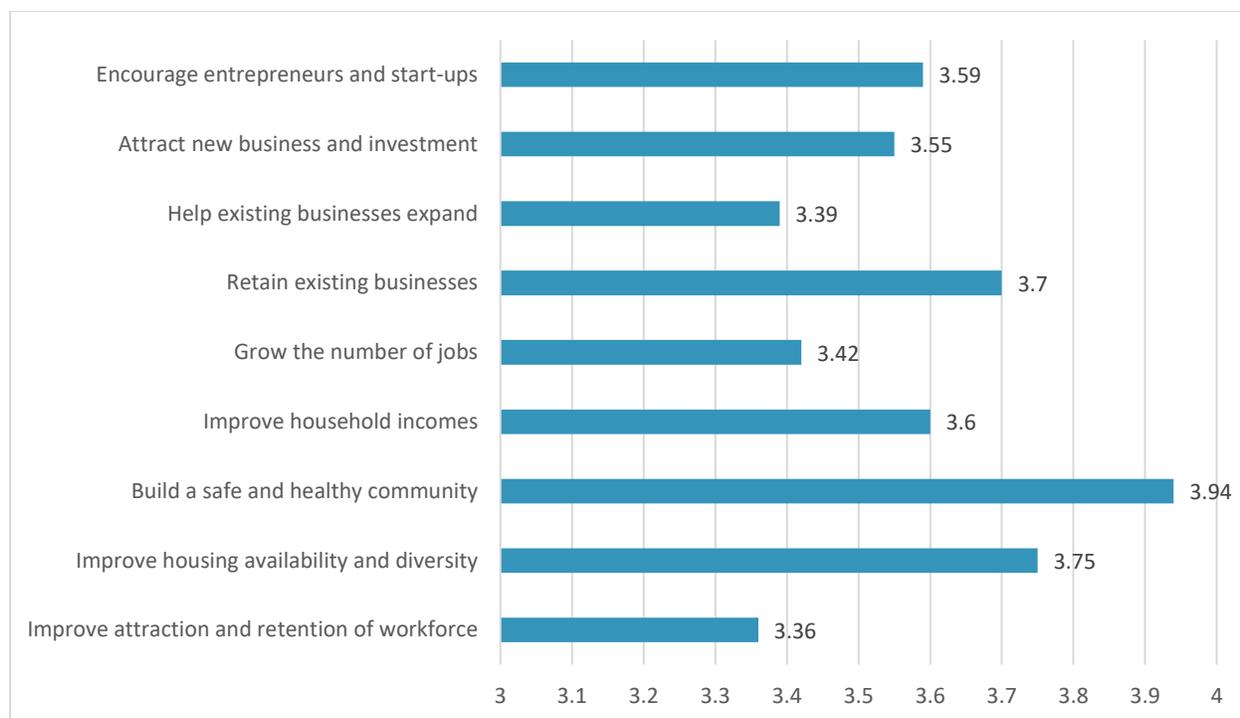
Of the 1,338 respondents, a total of 692 completed this question. A sampling of the responses is provided below. Overwhelming respondents identified housing affordability and high rental prices as their greatest weakness facing the District of Saanich.

Access to affordable housing	high rents for businesses
Access to doctors	Homeless (druggies) overflow from Victoria
Affordability - housing and other household costs-impacting workforce	Housing affordability
Affordability	Improve household incomes
Aging demographic coupled with disillusioned youth	How to solve the growing demand for elderly care and infant care
Aging infrastructure	Independent sports venues
agricultural land base	Lack of a "downtown" or community centre
Amalgamation talk, do NOT join Victoria	Lack of an articulated growth plan building on strengths
Bad redevelopments....	lack of basic above-ground infrastructure (sidewalks, bike lanes, bus shelters, poor road condition)
Bad road conditions	Insufficient economic diversification
Amazon warehouse	Lack of affordable housing
Barriers to establishing a business, i.e., maze of steps	It's low walkability
Better Hubs for Small businesses and neighbourhoods	Lack of family doctors
Better public transit for residents to access businesses	Lack of diversity /ethnic representation
Big box stores	Lack of infrastructure to support the current growth rate
brain drain	Lack of land for industrial and commercial activities
Bureaucratic log jams very anti-business!	Lack of quality industrial land - Saanich continues to support rezoning that is reducing industrial supply.
Car-dependence causes people to shop further away	Lack of staff
Changes to Gorge Rd & Admirals Rd to benefit bikes who do not contribute to costs like vehicular drivers do	Lack of well-paying jobs
Climate Change	Land availability and cost
Commerce is too concentrated for such a large area	Large tracts of unpopulated, undeveloped land
Commuting	Law and order or, lack of it, will negatively impact investment and tourism
Congestion on the roads means inefficiency	Lengthy permit process for development
Construction Costs	Local policies that restrict business
COST OF LIVING	Local talent cannot be retained, and foreign talent does not want to come

Cost of rent too high for small start up business	Low density housing limits commercial opportunities
Crime/homelessness moving in	Low wages
Designated hub (Uptown) is inconvenient to access, so disconnected	More bike lanes needed for safe transportation
Deterioration of ecological environment	need low-cost housing built-not missing middle/densification
Difficulty walking to frequently used shops	Need more housing options
Developers influence and control of property and slum landlords	Nimbyism
Diversification of development	no carbon means testing in new for-profit structures
Diversifying the economy	No city centre
Diversity/ presence of other cultural groups	No community street shops in Gorge Tillicum
Doctors' health care	No diversity whatsoever in Brentwood Bay
Drug addicts	No zoned/ recognized place for Trucks and associated industries.
Economic underdevelopment	No many new places to set up shop
Elderly care development	out dated zoning bylaws
Excessive local taxation	Not pedestrian friendly - walkability is low.
Excessive red tape makes developing impossible	Old infrastructure
Expensive house prices	Permit department inefficiencies
Forced density in too short a timeframe	Permitting departments not working together and taking too long to get permits for development. Oftentimes, 2 or more years.
Gap between rich and poor	Rent pricing, that's why we moved into my in-laws with our children
Getting around/ gridlock	rising crime rate
growth is not matching the infrastructure of the municipality	Transportation
Health care availability	High rent
High labor cost	

Question 9 – Please rank the importance of the following economic development goals for the community.

Of the 1,338 respondents, a total of 1,062 completed this question. As illustrated below “building a safe and healthy community” received 3.94 rating out of 4, with 69.3% of respondents identifying this as very high or extremely high in importance. This was followed by “improving housing availability and diversity” which was ranked at 3.75 out of 4. Here 62.1% of respondents scored this initiative was very important or extremely important.



Question 10 – Please let us know if you have any comments on economic development you would like to share?

Of the 1,338 respondents, a total of 520 provided feedback. The following lists the comments received by most respondents.

15-minute communities in Saanich with access to services, health facilities and parks are important to retain and attract employees in Saanich. Then focus on 3-5 economic development priorities where Saanich can differentiate itself.
A universal basic income would go a long to increasing local economic activity.
Accelerate the development of high-tech industries
Accept the constant need to balance development with preservation. Both are equally important, not necessarily mutually exclusive. We need a thriving business sector, lots of workers who can afford housing in the community AND lots of parks, green spaces and recreational areas. We don't want to live in a concrete wasteland, but neither can we stay frozen in a 1950's fantasy community.
Accommodation for visitors. Not Airbnb!
Add a little nightlife
Add a year-round dog park for the many dog owners
Add more policies to encourage individual entrepreneurship
Adjust the industrial structure, increase employment opportunity, etc.
Aiming for continual economic growth is killing the planet and will kill us with it. Build a circular economy. Deglobalize.
Align actions to support your climate plan, child care plan, and other existing priorities
All construction needs to incorporate universal design. This is broader than the minimum in the building code.
Allow coffee shops near schools/housing. E, g. Claremont High School.

allow people and or business, to proceed forward promptly. Do not waste time with permits and so on. Make them easy to get if needed. Allow developers (of real estate) to get approvals quickly.
Amalgamation, stop wasting money on upper management. Define clear vision on what the area looks like and stop the greenwashing business as normal approach to economic development. Development does not mean growth, it's the fundamental flaw in modern society. Diversify housing not just the same old approach, look to successful communal living models from across the globe instead of lining developers' pockets. More light industrial zoning but with very strict environmental guidelines. Develop a true green economy from within, highly incentivize truly green behaviours and strongly penalize poor environmental practices, such as shops such as Dollarstore. Localized community scale waste and energy management. Make it too expensive to be bad to the environment and make it pay to be good. E.g., Introduce local taxes on non organic food and processed foods, profits directly towards subsidizing organic and locally produced food and products. Increase garbage collection fees, give rebates if education (Hartland tour or online course) on reducing waste is completed. Etc.
Any future development must be contributing to the health of our planet.
Appreciate doing the work to plan for future
Appropriate reduction of personal income tax, the introduction of talents from all over the country
As much as improve and develop also keep up with modern technology
As our rural main corridors evolve, I agree with the residential over commercial developments. This gives us the retail space required to attract new business growth while also providing much needed housing options. It's nice to see this mix.
Attitudes must change. Repeat after me, we do not live on an Island.
Attract more investment and develop local characteristics
Attract talent and increase entrepreneurship and employment
BAN ANY AND ALL AIRBNB. We have the hotel industry supplying needed rooms.
Be vigilant about the rate and scale of development. Whether it is residential or commercial development, if it is developed to have both form & function, it will better integrate with the overall growth of Saanich as it evolves. Saanich has been good about setting standards with activity and building within its municipality. Set good precedents now and Saanich will attract like minded businesses and might be able to maintain its land use diversity. I think that will be considered incredibly valuable (and rare) in the future.
Better social and economic welfare to attract more investors
Bigger is not always better! Need to be careful about integrating all kinds of businesses into neighborhoods. I don't want to see the have neighborhoods not accepting businesses because of their ability to complain more successfully while those neighborhoods concentrating on working and family and not complaining absorb next door businesses that impact the neighborhood with not recognition and or control of that by Saanich. This "by complaint" only is an interesting approach that can have detrimental impact.
Blow up the current approval processes at Saanich Hall and streamline.
Buffering of noise between industry and residential areas is important. Please include safe ways to navigate the municipality by walking, buses and bikes. I like some of the street narrowing in Victoria to slow down cars through neighborhoods.
Build affordable housing and they will come
Build film studio; speed up approval process for new developments; allow more diverse zoning around the city (e.g., Corner stores, coffee shops in SFH neighbourhoods)
Build more low cost, small townhouses near high tech park to attract more skilled staff. Give tax breaks to attract businesses to set up here.
Build some housing. No one needs that much space. Come on now.
Build walkable, affordable communities and good people / businesses will come.
Building permit and rezoning very difficult in Saanich. Long waits. Good to protect District from wild development but also important not to make the process too lengthy or bureaucratic.

By implementing policies to save the planet, which do not work, you're destroying our lives. Too many rules and regulations!
Can increase the diversification of economic enterprises
Can we attract IKEA ???
Chasing growth at all costs must stop. Some growth is good, some growth is bad. Economic growth achieved by rapidly increasing housing costs is detrimental to society as a whole.
circular economy
Community needs to be walkable. Look into an alternative from individual vehicles and not dependent on BC Transit.
Create a tech plan, bring in new jobs, careers. Stop seeing yourself as only a bedroom community. Promote
Concentrate human, material and talent on key construction, and concentrate limited funds to develop key industries.
Convenient living circle
Create more jobs
Creating more density to support local businesses and create affordable spaces for workers and students will be critical to the future of Saanich.
Dare to try
Deliver the housing to bring density near transit, new tax revenue, DCC dollars and fight environmental issues
Densify more condo towers construction = economic development Fancy condos with fantastic views bring investors short term rentals and corporate chain stores on bottom floor this is Saanich's economic dream
Developing a vital economic base
Diversification of economic development
Diversified economic development
Diversified economy. Other industries, especially technology, education, tourism and manufacturing, need to be strengthened to reduce dependence on oil and gas industries and to improve economic diversity and sustainability.
Diversify the economy to attract talent
Do not sacrifice environmental protection to economic development. We need green spaces, and we cannot over densify and over what is left. Also, economic investment should be in and by locally owned and operated smaller companies.
Don't get bigger, get better. We do not need to invite the world here. We need to serve the community that lives here. Quality over quantity. Sustainability and healthy environment over development.
Don't be Langford. i.e., Cookie cutter design.
Don't develop the farmland. Farmland for food.
Don't keep too many idle people
Don't rely too much on other countries
Easier time to rezone
Economic activity is slowing
Economic development cannot come at the expense of environment (e.g., biodiversity, climate stability, water, pollution, greenspace).
Economic development is a regional opportunity, and its important to explore and strengthen the connections and interdependencies between the various municipalities. For tourism, regional strategies are important, and Saanich can be a key driver in making our destination's experiences more diverse and resilient.
Economic development is the development of value, not money, but benefit, not efficiency, and all-round development, not one-sided growth.

Economic development must be triple bottom line, including improving environmental and social well-being.
Economic Development should not lose sight of being accessible for Seniors and differently abled people. With the goal of active transport let's not lose sight of the fact that most seniors and differently abled people like to access businesses and recreation too. Also, more dog friendly places and dog friendly transit options.
Economic variables like total employment and number or scale of business can't be effectively controlled by the municipality directly. Saanich can constrain those variables, and achieve growth by releasing those constraints, but much of this comes down to permitting and allowing more housing. Everything is downstream of allowing more people, more density, and more built floor area, those three variables are things Saanich can effectively control and should be aggressively pursuing.
Encourage entrepreneurs and start-ups
Encouraging a variety of businesses and opportunities to shop within my own neighborhood is important to me. Improving walkable routes to these areas is also important.
Ensure businesses can afford rents
Ensure development does not destroy the sense of community.
Excessive economic growth has led to an increase in the number of poor people
Facing external challenges Facing internal challenges Measures taken
Farming and local agriculture needs to be both preserved and protected. In the future islanders will likely need to supply more food locally and we need to be forward thinking
Faster permit applications approval, bylaw updated, need to have faster and better communication to match market. Be more progressive and help home owners with suites to afford a home rather than make it difficult- help businesses succeed - it's so difficult to run a business especially now. Be the most progressive municipality and speed it up to allow 2 plus units on lots. I challenge you to find ways to keep taxes low when people are clearly struggling-be more cutting edge.
Fixing the regional transportation issues will help the economy more than anything else, such as subsidies or whatever else the politicians are thinking of.
Focus needs to be on entrepreneurial business ventures that are diverse and interesting in nature.
Focus on making sure shoppers come to/stay in our area
Focus on sustainability
For the most part the best thing a government body can do to encourage economic growth and development is to "stay out of the way". Being part of a social engineering experiment does not help.
Garden suites- ok but please keep them 1 storey only.
Get rid of the urban containment line and start allowing real, overdue and desperately needed room for housing
Give full play to the role of community social work in the construction of social service system
Give individual preferential policies to foreign enterprises
Government should keep its focus on the work of government and not economic development
Government should reach a balance between economic development and environmental protection.
Great to see that we are making efforts to grow together :)
Greedy developers are wrong. Don't listen to them.
Ground level commercial is key to sustainable residential density. Gives some where to work and enjoy so residents are not always driving somewhere.
grow the number of good paying jobs with benefits not minimum wage....
Helping with Agriculture and farming and reducing the number of geese destroying fields
Hoping to lower the cost of living.
Housing and affordability are huge.

<p>Housing crisis is so bad! Please make housing more affordable and available! Also, walkable communities with lots of nature access should be attractive to knowledge workers.</p>
<p>Housing is the most important issue facing Saanich and the lower island. More housing needs to be built and Saanich needs to figure out how to get it built. Join with B.C. government and non profits to build massive density or figure out how to incentivize corporations to build in Saanich. That is the number 1 priority everything else is a distant second.</p>
<p>I appreciate the new multi-storey developments with commercial on the lower floors & living on the upper floors</p>
<p>I don't and have never viewed Saanich as an economic engine. I don't think that Saanich should aim to be a bustling, endlessly growing hellscape like Langford and the other Western communities. I feel it is important to ensure that Saanich's natural agriculture and beauty is preserved.</p>
<p>I earn almost \$200K a year and could not afford a single family detached home. Instead, I had to buy a condo. Long term I will likely move to a city that has a lower housing price. That means I take my \$200K income with me to another city. I encourage you to do everything you can to make a home affordable to keep young professionals like me in this city.</p>
<p>I feel the city is not responsible for funding businesses; please fix our housing crisis and the roads.</p>
<p>I feel the jobs are here, the challenge is cost of living.</p>
<p>I have enjoyed living in Saanich for 29 years I've seen a lot of development which is good development but Now you start to see request for six story buildings you see developers pushing the limit and blaming the system that it takes too long to develop Saanich needs to stand their ground we don't need six story buildings we need traffic calming We need proper Road infractions not another stoplight Saanich continues to allow major developments but they are not addressing the traffic the roads I would like to use Royal Oak as an example they want to continue to build build but they will not make the roads safe for all these extra people moving around and not even a sidewalk</p>
<p>I have owned a business in Saanich for 17 years and have seen 0 support for business.</p>
<p>I hope taxes don't go up more, property taxes especially. The mortgage rate increases have caused major pain and stress on budget.</p>
<p>I hope that the district truly listens to the residents and works to honour their wishes instead of the way the Shelbourne corridor project is turning out. Listen to the community not special interests from outside of it.</p>
<p>I just think if we could give everyone a steady job</p>
<p>I recently moved to Saanich, and I like it...really don't want to see much in the way of change! Just maintain...oh, maybe better street signage, for safety.</p>
<p>I see so many restaurants and small businesses struggling. Special Taxation is needed for small businesses. The EHT threshold is too low, and the 5-day sick days is punitive to a small business, in this high inflationary times. We are losing businesses.</p>
<p>I struggle with expanding our economic base when we are unable to find staffing for current businesses.</p>
<p>I think municipal spending is wasteful. I think the bike lane could have been better directed towards health, helping those with extreme social problems.</p>
<p>I think Saanich has a lot of potential to redirect economic growth to redevelopment that spurs small businesses everywhere, a mix of commercial and residential and more dense/affordable housing options. It has the potential to be a really neat and more walkable/cyclable place. Everyone would be better served with amenities spread out across Saanich rather than amenities being confined to strip malls or malls proper (like Uptown). Small grocery stores and amenities like the Red Barn close to Patricia Bay Highway or the Township Coffee in Gordon Head, should be widely encouraged and available. They are gems that add character and make a neighbourhood more livable and cohesive. They are meeting places and keep people out of cars if they can walk to go buy some bread. I've lived in Gordon Head and now live near Quadra and Rogers - both very residential but on the cusp of interesting redevelopment with the right supports and incentives from the municipality!</p>
<p>I think Saanich is doing a good job.</p>
<p>I want this to be a walkable community with shops and art and parks that make we want to stay and move here</p>

I would like to see focus on helping local small Businesses succeed, especially in the agricultural industry. Local food and other products are what Saanich can excel with.
I would like to see less traffic calming on main roads such as Shelbourne. I think it needs to be more of a main road to get downtown and other places in Saanich.
I'd like to see the building permitting streamlined for land developers.
Ideological understanding is not in place, affecting community economic development. Most of the masses, enterprises and even some departments and units have not realized the importance of the development of community economy, the development of community service industry is not enough attention, support is not strong
If the farm economy is diversified or if there are other opportunities to generate income, the impacts can be mitigated
If we need a tax base to sustain municipalities then we need density that Simple
if you make the process easy and welcoming business will come (like it used to in Langford). If you clutter it up with riles and red tape it wont (like Victoria). Do not continue to jam up and slow down access around Saanich...economic development needs more than bike lanes and gardens in the middle of roads.
I'm not sure it is a municipality's responsibility to encourage entrepreneurs, but they should have a regulatory and business licensing framework that is supportive and doesn't hinder new businesses.
Improve by removing Bicycle Lanes
Improve comprehensive community services
Improve the quality of life of residents, improve the community environment
Improving livability and balancing growth is key. Don't be like Langford pro growth, or decay like Victoria
In terms of existing businesses expanding and being retained I would love to see a focus on small to medium sized local businesses rather than massive chains (like Home Depot, save on, Starbucks, etc.)
Inadequate parking and forcing congestion for bike lanes has destroyed downtown as has pandering to the homeless. Please stop making the same mistakes as Victoria!
Incentivize small business to grow and hire with rebates, grants and other tax incentives
Incorporate talents and expand the market
Increase employment opportunities
Increase infrastructure and attract foreign talents
Increasing the densification of housing supply to accommodate the increased population growth and to help drive down the affordable of housing
Industrial land development policies for advanced industries are absent and critical to attract investment that can employ graduates and professionals.
Investment attraction depends on community reputation and brand as a good place to invest and do business. It also requires proactive outreach to potential investors.
It is important to include a variety of residents of Saanich on development planning
It is unrealistic to expand your economic base when employees can't afford housing. It hard to attract employees to Saanich because of high housing prices.
It was too bad that Saanich turned down the chance to have a casino! It would have brought in some good paying jobs and increased revenue.
It would help small businesses to have affordable options to lease. Developers dictate the price per sq ft and since the 80s it's pushed out small businesses in favour of chains instead of Mom & Pop operations.
It's much more likely that local government will hurt rather than help businesses. Taxes and regulations make business less likely to succeed.
It's hard to have an economy when people can't afford groceries.
Keep apartment buildings in OCP corridors only and no secondary OCP corridors in residential neighborhoods.

Keep natural environment in tact, practise controlled not excessive growth, keep feel of community
Labor shortage
Learn the best from Europe and Asia
Less condos please
Let's get it done.....
let's try to NOT pave paradise and put up a parking lot... shall we?
Local government has a big role to play, but local governments often have burdensome regulations and red tape that are divorced from reality. Reduce regulations and set up service levels for timeliness of applications of all types
Lower taxation rates taxes are pushing businesses away from our community
Lower the cost of living. Get people more involved in their careers
Lower the scenic spot charge standard, introduce enterprises to invest
Macroeconomics looks at supply in the long run, demand in the short run, institutions in the long run and money in the short run.
Major economic development and common development with various economies
Make mandated parking spaces available in workplaces and new buildings. People can not carry groceries home on a bike. Not everyone can bike to work. Not everyone enjoys riding a bus. Enforce new regulations to ensure an apartment building has adequate parking spaces available
Make starting a small business easier -- see the COV model. Also, legalize and promote boulevard sales and businesses that do not require a building to operate out of. Allow commercial activity in zones currently identified as residential -- e.g., businesses operating out of basements or garages or downstairs from a home.
Make sure condo developments include shops for local residents and others in Gorge Tillicum. It is like a commuter bedroom community here, with tons more condos and bike lanes. Where's the village vibe to walk to? Look at Langford, condos and shops on main streets. Tillicum and Gorge could both be developed in this way.
May be allow non household member to assist someone having a business in his/her home
Thank you
May the rich lead the poor to develop into a well-off society.
More co-op housing built. More government grants made for businesses to stay a float in tough times. But instead of those businesses losing employees because of cut backs, make a clause in the grants, that the business needs to pay top dollar for keeping the right staff on. Then give them a break in the payment back.
More diversified economy
More job opportunities and talent discovery
More needs to be done to improve how goods are moved around Saanich. More cargo bikes and electric vehicles are needed.
More neighborhood coffee shops and other retail
More options for small local neighbourhood corner stores, coffee shops, patios or restaurants. Everything either requires a short drive (which isn't bad) or a bus/bike ride, but it would be nice to have more walkable options within neighbourhood street corners and not just main villages (Broadmead, royal oak, Saanich centre, uni heights etc.)
With Victoria passing their MMHI I hope Saanich follows suit similarly, and distances from so many detached single family homes, and encourages more townhomes on arterial/side streets and more dense mid rises on all main streets, plus storefront/business/childcare/grocery options on ground floors would hopefully continue to improve walkability
Most jobs occur outside of Saanich except retail and other minimum wage jobs. Dining options are becoming less. There is nothing fun to do in Saanich.

<p>Most of the above choices depend entirely on law and order/public safety, the appearance of the city, much of it ruined. Tourist attractions vanishing. The best way to make housing affordable is to slow demand. Creating economic development zones throughout BC to take population growth pressure off the region is the only way to protect what we have left and manage growth more efficiently.</p>
<p>Need to diversify the economy to bring in talent</p>
<p>Need to ensure we have a strong community that supports independent business rather than large corporations such as Walmart, McDonalds, etc.</p>
<p>Need to focus more on young people. No one goes to Saanich for fun. If they do it's for free activities like hiking.</p>
<p>Need to focus on supporting existing businesses. Make it easier to do business in Saanich. Keep taxes and red tape to a minimum</p>
<p>Need to improve the introduction of talent economic diversification</p>
<p>Open a Costco and a casino. Lose the bike lanes. Drop all unnecessary programmes</p>
<p>Optimize community development environment, build investment platform</p>
<p>Optimize community development environment, build investment platform. Foster a sense of large community, guide and support communities to attract investment to set up economic entities, and introduce social forces to set up community service industries</p>
<p>Others agree to sacrifice some of their take for the sake of creating extra jobs or diversifying the economy</p>
<p>Our biggest economic asset is our Natural Capital</p>
<p>Our health care should be #1 priority over everything. Then the cost of living.</p>
<p>Our LAP at Tillicum and Gorge calls for a village. We are desperate for this. We need a diversity of shops (e.g., noodle joint, delicatessen, coffee shops, bike store, butcher, baker etc. etc.) and a pub or you will continue to suffocate us into our cars and drive elsewhere. All of this should be walkable. Such a village has been on the books for decades and I'll be dead and buried if this pace is allowed to continue and I'm only 50. It's high time Saanich "sets the table" for developers to come into the community and redevelop sites with residential over commercial space. Make the sidewalks bigger. Ensure there is some (not a lot, just some) parking and make Tillicum Rd a complete street. Beautify it. Add some trees for shade and fancy lamps and benches, encourage people to sit and chat. this street resembles an airstrip in Baghdad. The bike lanes are a good start. Waiting for Tillicum Centre and the resulting CACs for this street work is the lazy, cheap, uninspiring and shameful way out if this - news flash, there is a housing availability and climate crisis at hand. Spend our tax dollars in manner commensurate with these pressing issues and let us walk more in our community instead of having to drive elsewhere. Now. Not soon. Now please. Right now. Thank you.</p>
<p>Our political stance is not one everyone can come to agree upon. A standard of regulations should be set in place at a sub level to restrict certain change in infrastructure, sustainability, which meet community concerns</p>
<p>Over the BC economy has too much money in real estate, which is an extraction industry, that wealth does not snowball in local communities. Any business that is involved in local production should be encouraged, and public transit needs to be expanded.</p>
<p>Please consider 'strong towns approach'</p>
<p>Please continue to advance policies that will support new housing options in the community.</p>
<p>Please do not allow another development like Tuscany Village. Parking lots should have enough room for cars to pass each other comfortably. There should be some room between the buildings and the sidewalk, and between the sidewalk and the road.</p>
<p>Please DO NOT amalgamate with Victoria city.</p>
<p>Please don't change the basic nature of the municipality.</p>
<p>Please increase flexibility for home-based businesses. The current bylaw is too restrictive and needs to be updated.</p>

<p>Would love to see more new small businesses, not chains. Housing solutions for employees and employers. Less focus on constant growth and expansion than in creating more small businesses that add value/character to a neighbourhood; sustaining a small workforce with living wages; zero-waste models; and strong connection to business as placemaking, adding to neighbourhoods; connections (for food) to local agriculture. Agriculture embedded in neighbourhoods - Top Soil model - connect restaurants to locally grown produce.</p>
<p>You are asking the wrong questions in #7 above.</p> <p>Either that or you are intentionally biasing the survey.</p> <p>I would like to see more employment in environmental organizations which would advise on marine and land environmental issues as well as climate change. You would have to work with the province and the federal gov'n't for financing. We could become an int'l center of knowledge in a growth industry. We have several universities and lots of talent.</p>
<p>You can't have poorly paid jobs that are filled without housing for that income in the area. If your store isn't open, you don't make money</p>
<p>You have addressed the main items</p>
<p>增加就业机会 (increase employment opportunities)</p>
<p>希望经济发展能好一点让贫苦人都能得到帮助 (I hope that the economic development will be better so that the poor can get help)</p>
<p>抓住机遇很重要， 应对挑战同样很重要 (It is important to seize opportunities, but it is also important to meet challenges)</p>
<p>改善下无车出行不便利 (Improve the inconvenience of traveling without a car)</p>
<p>金融支持经济增长的效率下降， 系统性金融风险上升。 (The efficiency of financial support for economic growth has declined, and systemic financial risks have risen.)</p>