

# Economic Development Plan

Town of Sidney





# Final Report

November 24, 2022

# Acknowledgement

The Town of Sidney is located within the traditional territory of the W̱SÁNEĆ peoples, represented today by W̱JOŁEŁP (Tsartlip), S̱ÁUTW̱ (Tsawout), W̱SIKEM (Tseycum), BOKÉĆEN (Pauquachin), and MÁLEXEŁ (Malahat) First Nations. The W̱SÁNEĆ People have been here since time immemorial and this is their home.



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# Executive Summary



## Why is this plan needed, and why now?

The Town of Sidney's extensive process to renew its Official Community Plan (OCP) in 2021/22 gave rise to an opportunity to take an in-depth look at the Town's economic future, outline actions to address challenges and bring the economic elements of the community's vision to reality over time. In addition to the OCP, the emergence of COVID-19 resulted in a need for the community to reflect upon the very real challenges that businesses face in moving towards full recovery.

This Sidney Economic Development Plan was initiated by Sidney Council with the work undertaken by independent consulting group Lions Gate Consulting following a competitive process. Starting in early 2022, Lions Gate conducted an in-depth analysis of the Town's socio-economic trends, including an assessment of the external forces that influence and impact the Town — from macro forces to those at the regional and local levels. The consultants completed several engagement activities to inform this work, meeting with local business and community leaders, conducting two surveys and completing focus groups and one-on-one meetings with key stakeholders along the way.

The results of this analysis and consultative work point to a range of challenges, some within the jurisdiction of municipal government and many far more complex. Challenges include:

- demographic change (Sidney's above-average population age);
- a highly constrained land base with ongoing competition between uses;

- concerns about the availability of affordable workforce housing that exacerbate the ability to attract skilled labour to keep local businesses open and local services, such as healthcare, functioning.

There are also opportunities. Many business owners regard Sidney as a vibrant place to do business. It's walkable, accessible, and has a low ratio of commercial to residential taxation (relative to most other CRD municipalities). This implies that previous Councils have recognized the vital role of local businesses in the community's vibrancy.

Employment lands in West Sidney, Harbour Road, and Downtown Sidney drive the local economy and are major contributors to the Town's tax base. Protecting these areas will be critical so that families can work close to home, spend less time commuting and spend more time engaged in community activities and civic participation. Economic prosperity is an essential component of community well-being and quality of life.

Sidney's new Official Community Plan (OCP) outlines ambitious goals for building a thriving economy through two equally important courses of action:

1. Strengthen policy guidance that supports the socio-economic objectives laid out in the OCP. A thriving economy does not happen automatically — it must be pursued.
2. Involve local and regional businesses, community groups and economic development partners in transforming those policies into a realistic suite of actions.

## A renewed vision for Sidney's future economy

The OCP's vision statement reflects the interests and expectations of residents and businesses in Sidney. These include a lively, welcoming seaside town, a vibrant downtown, a healthy, diverse and connected community and various housing choices and supportive amenities. Importantly, the OCP will strive for clean, household-sustaining jobs for the next generation of residents and reconciliation with First Nations and Indigenous peoples.

The economic challenge is not just local — it involves interactions and connections with the region, the Province and First Nations. Issues around housing, employment, land preservation, labour market development and transportation services are not unique to Sidney but are shared across the region. As such, they should be addressed first by acknowledging those mutual interests, and second by pursuing action through partnerships.

In a report from the Rising Economy Taskforce, of which Sidney was a participant, regional leaders stated that the region must collectively take bold steps to nurture a more innovative, diversified, inclusive and sustainable economy (SIPP 2020b). This was echoed by the South Island Prosperity Partnership (SIPP), the region's economic development alliance, which the Town of Sidney co-founded. SIPP's latest strategic plan, Rising to Resilience 2021-2024, notes that turning ideas into impact through strategic action is much easier when we work together.

## Where are we now?

This economic development plan is rooted in Sidney's current situation. A defining characteristic of the Town's population is its high proportion of older age cohorts relative to other municipalities and the country. The population aged 65 and over stood at 40.9% in 2021, twice the provincial share. This has two major economic implications: a low labour market participation rate and a relatively affluent cohort who can out-compete working families for available housing.

The knock-on effect is a constrained labour supply and increasing challenges for businesses and service providers who need access to skilled and unskilled workers. In this report's survey of Sidney businesses, the number one business challenge identified was the availability of labour. At the same time, workforce and housing development were the two top recommendations as economic development goals. Interestingly, property taxes and red tape were ranked low as barriers to development. Similar views were expressed in the community survey (with 272 local respondents). Survey results showed the top-ranked economic development goals were affordable housing, better transportation/transit services and improved household incomes.

## What are the key actions and next steps?

The three themes of this Economic Development Plan are place, people and business, with the mutually supportive goals of quality infrastructure, a skilled, inclusive labour force and a competitive, growing economic base.

Major initiatives recommended for 2023-2024 include:

- working to ensure employment land is preserved and managed to accommodate existing and future business needs;
- more active engagement and involvement with SIPP programs and services, especially those linked to outreach and cooperation with Indigenous partners;
- leveraging Sidney's assets to diversify the local visitor economy; and
- launching a business retention and expansion service that will assist local businesses stay and prosper in the community.

Plan implementation will require leadership from Council and the Town staff, as well as partnerships with key organizations like the Sidney Business Improvement Area Society, South Island Prosperity Partnership and others. Implementation will also depend on the support of the community.

We encourage readers to explore this Plan and to remain involved in encouraging its progress over the years to come.







# Background

## Introduction to the Plan

# Preface

## What is Local Economic Development?

Local economic development occurs when a community exercises its power to reduce the barriers, risks and costs of private sector investment in economic capacity that creates employment and quality of life for all. It is about catalyzing productive capacity and economic activity through a combination of land, infrastructure, labour, capital, and technology.

## Why Undertake Local Economic Development?

The main goal of economic development is improving the economic well-being of a community through efforts that entail job creation, job retention, tax base enhancements and quality of life. As there is no single definition for economic development, there is no single strategy, policy, or program for achieving success. Communities differ in their geographic and political makeup, as well as strengths, challenges and opportunities, therefore, each will have a preferred pathway for economic development.

In Sidney, a local economic development program can provide the following benefits:

- Guidance for economic activity that supports the vision, objectives, management direction and policies of the Official Community Plan;
- Encouragement of employment, household income, and a tax base that contributes to community health and wellbeing; and

- A culture of positive local action and achievement that strives to keep the community innovative, diverse and sustainable.

## What are the Biggest Challenges Today?

Local economic development programming in Sidney will be influenced by several emerging challenges:

- Two and a half years of pandemic-related health, social distancing and travel restrictions that have deeply affected the economy, key sectors, employment and business activity;
- Demographic change and the ongoing influx of older-age migrants to the Capital region;
- Space and expansion constraints in the downtown core area;
- Parking, access and wayfinding for visitors;
- Access to labour (both local supply and those travelling from other areas of the region to work in Sidney);
- Land use dynamics in west Sidney (e.g., maintaining industrial lands while expanding amenities) versus downtown (e.g., achieving residential density while accommodating retail and services); and
- Lack of affordable workforce housing both in form and tenure types and the challenges it creates for labour access.

# Introduction

## About Sidney

Sidney by the Sea is situated within the traditional territory of the W̱SÁNEĆ People along the shores of the Salish Sea on the Saanich Peninsula, amidst the Gulf Islands. In close proximity to the Swartz Bay Ferry terminal and the Victoria International Airport, Sidney is a 20-minute drive to downtown Victoria, BC's capital city. It is one of the 13 municipalities within the Victoria Census Metropolitan Area. The town is the only Canadian port-of-call in the Washington State Ferries system, with ferries running to and from the San Juan Islands and Anacortes.

The 2021 population of 12,318 reside in a flat, walkable community of 5.10 square kilometres. Sidney's major economic sectors are manufacturing, retail and tourism. There is an important marine sector in the area, ranging from marinas to boatbuilders and marine suppliers. A scenic 3.6-kilometre waterfront walkway, a historical museum, the Shaw Centre for the Salish Sea Aquarium, a Fishing Pier and a vibrant downtown boutique shopping district are among its amenities.

## Report Purpose

This Economic Development Strategy presents a road map and work plan for guiding the Town's economic development efforts for the next five years. It prioritizes Sidney's assets and existing economic base and aligns with other Town planning, including the OCP and corporate strategy.

A Current Situation Assessment was the first of two reports delivered as part of this study. It is attached as Appendix A to this report.

## Methodology

The methodology for this report consisted of primary and secondary research. Secondary data sources, statistics, documents and studies were collected and reviewed to understand economic conditions in the Town and capital region.

The primary research consisted of two surveys conducted during February 2022. A business survey received 117 responses and the community survey 272 responses. Results are shown in Appendix A.

Focus groups were conducted on March 30 and 31 in Sidney. These sessions were supplemented with key informant interviews. A planning workshop with 12 participants was conducted on April 27 and 28. The feedback obtained from the focus groups, interviews and workshop was used to compose the direction and majority of the content of this Plan.

A list of all cited references and personal communications is provided in the References chapter.

# Work Steps and Timing





# The Situation Today

A snapshot of the Current Situation

# Demography and Economy

## Population Characteristics

Sidney's population has grown 50% over the last 40 years, slower than growth experienced in the Capital Regional District and for BC, but still robust given the small footprint of the Town and the lack of new subdivision lands. One of the defining features of the local population is its high proportion of older age demographics. With approximately 40.9% of its population over the age of 65, it has twice the seniors' population share of the province. This has resulted in a median age of 59.8 years, well ahead of the provincial median age of 42.3, according to Canada's 2021 census.

The average household income is above the BC average and growing more rapidly due to the in-migration of wealthy retirees. The community will keep growing in the future, by an expected 10% over the next 20 years. This will lag overall BC growth again due to constrained land and housing opportunities.

## Implications

The trendline for population change in Sidney has two major economic implications. First, an aging population will mean that the labour participation rate will decline, translating into fewer residents active in the labour market, which will increase reliance on surrounding communities to supply the labour needed to maintain local services and amenities that Sidney residents enjoy and depend on. And second, a growing, well-off retirement community will increase pressure to maintain a balanced stock of housing that can accommodate working families. To sustain economic

activity and local services, a growing supply of labour will be needed. This will require new forms of housing both in Sidney and the Saanich Peninsula and improved transportation services that expand the labour catchment area.

## Economic Base

The economy of Sidney and the Capital Region is primarily a service-based economy and continues to move in that direction as time passes. Approximately 85% of all jobs in Sidney are in services with retail and wholesale trade, health services, transportation services and the public sector leading the way. The other 15% of jobs are in goods-producing industries, which despite their small share are critical to the community's economic base. Not only do goods producers like manufacturers pay above-average wages, but when indirect and induced impacts are considered, they also make an outsized contribution to the Town's tax base. The marine industry, including boat maintenance and repair, is another key component of the goods sector. Transportation industries, which are technically services, are also integral to the goods supply chain. Businesses affiliated with air, water, trucking and warehousing are all clustered in Sidney because of its strategic location, linking southern Vancouver Island to the Metro Vancouver.

## Implications

The major growth industries of the future will be in professional, scientific and technical services, and if the average age in Sidney remains high health

# Business Districts and Infrastructure

services and occupations will grow as well. As a regional shopping destination, downtown retail will continue to evolve in response to digital and e-commerce trends. Goods production and transportation services will keep pace because of the Town's inventory of industrial land and proximity to strategic assets like the airport and ferry terminals.

## Business Districts and Infrastructure

Sidney's three business districts, Harbour Road, west Sidney and Downtown, are distinctive in their business composition, land-use needs and future economic prospects.

The west Sidney district, which features light to medium industrial land uses, is home to steel fabricators, machinery and specialty manufacturing, "clean tech" research, transportation services, warehousing, professional services and construction services. It is where most of the community's trade and export activities are located.

The Harbour Road district is a small but important business area, hosting a cluster of marine related businesses, including full-service marinas, chandlery, yacht concierge services, boat storage and repair, and custom boat building.

Downtown Sidney is the main commercial service centre for the north end of the Saanich Peninsula. Land use is oriented to mixed use retail, office and commercial, and higher density residential. It has the highest concentration

of buildings, people, and jobs of the three districts and serves as the shopping, dining, entertainment and arts and culture heart of the immediate community and surrounding Peninsula communities. It also attracts visitors from across the region and beyond.

The business districts are interspersed with residential uses, transected by the Pat Bay Highway and served by economic and socio-community infrastructure, including parks, recreation and culture facilities, waterfront amenities, and transportation services.

## Implications

There will be increasing pressure on Sidney's limited land resources to accommodate population growth while maintaining an appropriate balance of industrial and commercial properties for employment generation. Protection of the industrial land base will be required given Sidney's strategic location and attractiveness to transportation companies, but there is likely to be increasing demand for mixed, intensive uses. Historic low vacancies in Metro Vancouver and soaring lease rates will push some demand to southern Vancouver Island. Downtown Sidney will undergo a continued transition to mixed residential, retail, office and health care use. However, affordability for small retailers and service businesses will be an issue if the conversion and loss of older properties result in higher lease rates in newer buildings.

# Local Planning Themes

2022

## Official Community Plan

- Lively and welcoming seaside town at the commercial heart of the Saanich Peninsula
- Vibrant downtown
- Thriving local economy
- A healthy, diverse community, housing choice and supportive amenities that emphasizes health, happiness at all stages of life
- A friendly, inclusive community
- A strengthened relationship with W̱SÁNEĆ peoples

2018

## Sidney Corporate Plan (2018 to 2022)

- Complete Community
- Environmental Stewardship
- Community Engagement
- Organizational Excellence
- Community Infrastructure – the Town will be a leader in the management of its assets.

2019

## Housing Needs Assessment

- Strengthen policies and regulations to prioritize needed housing types
- Strengthen incentives for non-profit and private developers
- Develop and strengthen partnerships and coordination between organizations

2017

## West Side Local Area Plan

- Economic vitality and resiliency
- Active transportation and connectivity
- Attainable housing options
- Low-impact development



# Business and Economic Trends

Economic activity in Sidney is influenced by local and regional forces, but it is also impacted by national and global trends. Developments of note in the economic, social, technological and environmental spheres are noted below.



## Economic

- Shift from goods to services
- Decline of resource industries
- COVID-19 business interruptions
- Rebalancing supply chains
- Remote and freelance work
- Transitioning of employment lands to new uses



## Social

- Demographic change, ageing
- Communication technologies
- Deurbanization
- COVID-19 effects on work
- First Nations Reconciliation



## Technological

- Growing competition from e-commerce
- Internet of Things
- Digital currencies and decentralized transactions
- Artificial intelligence
- Communications infrastructure
- Broadband services
- Digital skills and access divide



## Environmental

- Sustainability
- Climate Change adaptation
- Rising sea-levels
- Heat wave response
- Air quality from forest fires

# Strengths, Challenges, Opportunities



## STRENGTHS

- Marine industry and services
- Desirable place to live, visit and retire
- Small-town vibe and seaside charm
- Weather and landscape/views
- Safe and secure/low crime rate
- Low business to residential tax ratio



## CHALLENGES

- Labour force availability and retention
- High prices of land, housing and rental rates
- Balancing growth with small town ambiance
- Friction between different land uses
- Inflation, potential recession



## OPPORTUNITIES

- Affordable housing options
- Marine industry sector retention and expansion
- Tourism development
- Knowledge/tech economy
- Leveraging transportation assets and location
- Connecting the community to the waterfront
- Strengthen the retail hub



# Plan Guidance

Implementation, Vision, Goals and Themes

# About Implementation

## Approach to Implementation

The Town of Sidney has commissioned this Plan to help provide direction for the local economy and articulate priority actions that will support Sidney's vision. This means while the Town will lead certain elements of the plan, many partnerships and collaborations will be essential to bring it to life. The Town does not have an economic development office or function, and while there are opportunities for assigning portions of the Plan to municipal staff where there is an appropriate fit, this will affect only some of the recommendations. Therefore, implementation of the plan should be considered in the context of limited Town resources, and strategic thinking that keeps the plan active, alive and relevant.

The Town will need to be focused but realistic about what can be accomplished given the time and resources available. But it must also be committed to action and opportunistic about working with its key partners. One of the primary goals of the Economic Development Plan is to have a competitive, growing economic base which will require the proactive coordination and support by the municipality in collaboration with strategic partners.

## Core Partners

There are two core partners in this plan:

- Sidney Business Improvement Area (SBIA); and
- South Island Prosperity Partnership (SIPP).

The Town contributes financially to SIPP and has an agreement with the SBIA to provide partial funding of the Business Development Manager position. Both organizations have their own mandate, expertise and capacity that over time can be utilized to assist with Plan execution and achievement. Areas of expertise and responsibility are shown on the following page—initiatives in the following chapter will be partnered with SBIA or SIPP accordingly.

The Town should meet with the SBIA to evaluate the current agreement determined on the adequacy of funding required to implement this Plan. The SBIA would lead five of the 13 initiatives and play a co-lead role in a sixth. Realistic expectations for implementation may require supplemental resources from the Town.

# About Implementation



**Areas of Responsibility:**

- land use
- municipal services
- housing
- property taxation
- permitting



**Areas of Responsibility:**

- business advocacy
- business networking
- access to government programs and services
- retention and expansion



**Areas of Responsibility:**

- regional partnerships
- Indigenous economic development partnerships
- investment attraction
- access to government programs and services
- cluster development

# About Implementation

## Other Partners

There are many other partners who will be involved in the plan in the years ahead, including businesses, non-profits, developers and landowners. Their participation is vital for bringing expertise and resources to the table, so the plan is aligned, integrated and mutually beneficial. Key organizations that could be involved include:

- First Nations
- Beacon Community Services
- Saanich Peninsula Chamber of Commerce
- District of North Saanich and District of Central Saanich
- Provincial government ministries
- Destination Greater Victoria
- Tourism Vancouver Island
- Association of BC Marine Industries
- Centre for Ocean Applied Sustainable Technologies (COAST)
- BC Transit
- Victoria Airport Authority
- Post-secondary institutions
- University of Victoria Centre for Aerospace Research
- Victoria Innovation Advanced Technology and Entrepreneurship Council (VIATEC)

# VISION

Sidney is a distinctive, vibrant community, a gateway to the Gulf Islands and a regional centre for the northern Saanich Peninsula. Harbour Road, west Sidney and Downtown offer a mix of commercial enterprises and a range of land-use types that present opportunities for business development and job creation. A positive business climate, balanced land use and quality infrastructure attract investment that keeps the local economy growing but sustainable. Tourism, manufacturing, marine industries, transportation and trade are competitive and growing sectors serving local and international markets. Economic prosperity is achieved through collaboration with capital region partners and a dynamic working relationship with W̱SÁNEĆ First Nations.



# Goals



## **Diverse, adaptable land use**

Employment land, transportation services and housing that can accommodate the jobs of the future

## **Skilled, inclusive work force**

A qualified, inclusive and productive labour force that meets the needs of local businesses and residents

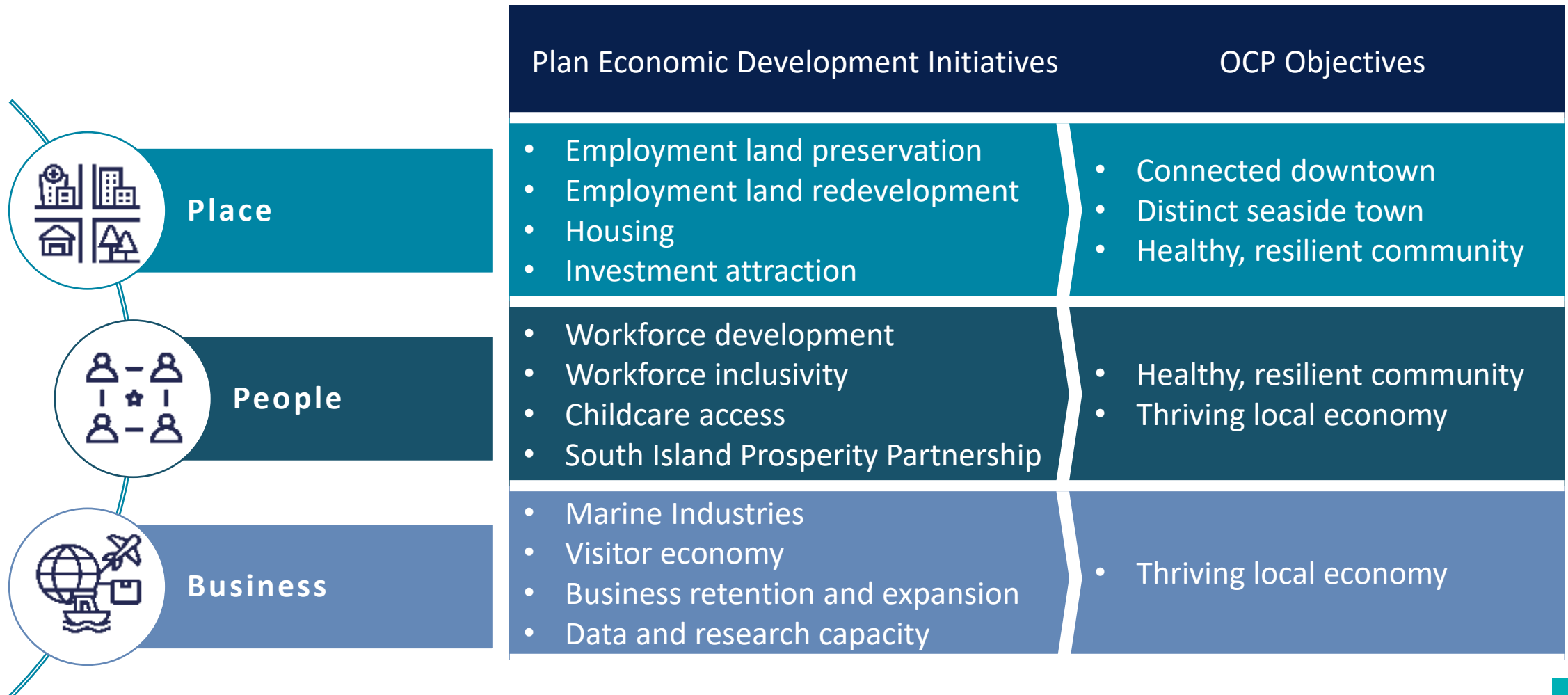
## **Competitive, growing economic base**

A growing, diverse and entrepreneurial business community that provides good-paying, sustainable jobs and contributes to the community tax base



# Strategic Themes

The Strategy is structured around three themes, Place, People and Business, and nine associated Initiatives. The pillars and themes are aligned to and support the objectives set forth in the new Official Community Plan (OCP).





# Plan Priorities Initiatives and Actions



# 1 Place Initiatives

## 1.1 Employment Lands Preservation

A growing population and increasing housing demand have consumed employment land in the Capital Region over the last 30 years. Sidney's future job base will require the preservation of employment lands, so the objective of increased employment opportunities stated in the OCP and the CRD's Regional Growth Strategy remain achievable. The Town's small geographic footprint and built-out development lands mean there are limited to no opportunities for greenfield additions to the employment land inventory. Industrial lands regionally are in short supply and are likely to play a critical future role in economic activity, given the municipality's strategic location in the region's transportation network. Lands zoned for industrial use typically generate jobs that pay above-average compensation and therefore higher household incomes. Importantly, they contribute significantly to municipal services by subsidizing the residential tax base.

**Lead: Town of Sidney**

### Initiatives:

1.1.1 Analyze trends and undertake smart practices research that support OCP land use objectives and maximize economic development values of quality jobs, tax base expansion and diversified economic base.

1.1.2 Investigate enhancing the business license database to include employment and building space metrics so data can be used in performance measurement and to enhance reporting.

## 1.2 Employment Lands Redevelopment

The Town can encourage flexible and adaptive employment land redevelopment that is able to keep pace with the changing economy and employment land demand by maintaining an efficient development approval process. A positive development process can help attract the investors and developers that will keep Sidney's employment land productive, without compromising the scale, pace and form outlined in the OCP and the West Side Local Area Plan.

**Lead: Town of Sidney**

### Initiatives:

- 1.2.1 Keep permitting times and costs competitive with other local governments to attract investment in employment creation.
- 1.2.2 Explore a revitalization zone in Sidney that uses progressive taxation tools to increase employment density per unit of land, with a focus on west Sidney redevelopment projects.

# 1 Place Initiatives



## 1.3 Housing

Efforts to expand non-market/workforce housing products would complement recommendations made in the Housing Needs Assessment (Urban Matters 2019) and reiterated in the OCP for more affordable, diverse housing options in Sidney. All levels of government have prioritized affordable housing initiatives for disadvantaged groups, the working poor and those at below-average household income levels. Increasing housing access for younger families would provide a boost to the local working age population and local available workforce, while helping to alleviate excessive travel and commute times.

**Lead: Town of Sidney**

### Initiatives:

- 1.3.1 Define workforce housing as rental units suitable for key industry workers earning between 60% to 120% of Sidney's median income and unable to purchase a home near their workplace.
- 1.3.2 Maintain and regularly update a list of assistance programs for new workforce housing.
- 1.3.3 Continue to collaborate with local authorities and housing agencies, and development community to identify and fund local non-market housing projects.

## 1.4 Transit Services

The Town can advance its goals for creating a complete community, meet its sustainability objectives and enhance the local economy by improving transit services and other options for moving people, and goods, in and out of the community. Sidney already has a higher level of transit use than other CRD communities and its average commute times are lower than the BC and CRD averages. However, the high cost of real estate means many local workers must live outside the community and commute regularly. Conversely, in 2016 two in three Sidney residents worked outside the Town boundaries. The OCP has outlined policies for expanding partnerships that increase local use of active transportation and transit.

**Lead: SBIA, SIPP and Town of Sidney**

### Initiatives:

- 1.4.1 Engage west Sidney business community to build support for road improvements and active transportation access (including parking, road quality, egresses, ingress).
- 1.4.2 Work with BC Transit and the Capital Regional District on regional transportation priorities:



# 1 Place Initiatives

- Highway safety and multi-modal improvements
- Connectivity to the Southern Gulf Islands
- Increasing the number of seats the Peninsula has on the Transit commission
- Green transportation alternatives
- Improved access to transit park and rides

## 1.5 Investment Attraction

Investment attraction efforts should reinforce placemaking initiatives outlined in the OCP, specifically those involving employment and business development objectives:

- transit-oriented development on Beacon;
- large-format retail in mixed use projects west of Fifth Street on Beacon;
- diversified commercial activities Downtown;
- Downtown Waterfront Vision and cultural hub;
- Seaport Place;
- a workforce housing project pilot;
- eco-tourism and cultural tourism; and
- high tech and light industrial activities.

The Town can also take steps to increase the local hotel offer, thereby boosting overnight stays in the community and generating more demand

for destination experiences. Sidney is a destination for many travelers arriving and departing the South Island via air and ferry terminals. The volume of leisure and business visitors travelling through the community is substantial, but spending is limited as the number of overnight stays is low. Vancouver Island overnight visitors spend about \$120/day whereas day visitors spend a fraction of that.

### Lead: Town of Sidney

#### Initiatives

- 1.5.1 Cultivate relationships with key partners that have investment attraction capacity, programs and best practices, including SIPP and the Vancouver Island Economic Alliance.
- 1.5.2 Create a new Business landing page on the Town website structured around an investment attraction narrative, data dashboard and call to action for contacting the Town. This can be accomplished within the existing directory structure and linked to the SIPP marketing collateral for the region.

# 1 Place Initiatives

- 1.5.4 Work with SIPP to prepare content for several “success stories” that includes profiles in multiple formats of entrepreneurs or knowledge workers describing their experience of moving to and living in the community.
- 1.5.5 Work with Destination Greater Victoria, SIPP and other partners on a hotel attraction strategy.
- 1.5.6 Work with SIPP to profile Sidney’s opportunities to international business delegations and strategic investment partners.



# 2 People Initiatives



## 2.1 Workforce Development

Sidney is a small but economically diverse local economy. A shared vision of workforce development would lay the groundwork for cooperation across all sectors. The community is favourably positioned by having three business districts with different characteristics, each with growth potential. However, only 48.2% of residents over the age of 15 are in the labour force. Many businesses rely on workers who reside outside the municipality. There are many players involved in this field, including all levels of government, educational institutions, industry and non-profits. The Town can work with the SBIA, Chamber and Beacon Community Services to promote access to resources, best practices and labour market services.

**Lead: SBIA + Chamber**

### Initiatives:

- 2.1.1 Work with Beacon Community Services (BCS) to enhance and expand the delivery of two programs, Jumpstart Employment, Training & Skills (JETS) and Skill Work Experience Employment Training (SWEET):
- JETS focuses on disadvantaged youth and the development of life and social skills—there is an opportunity to supplement this program with education and skills training and better access to the local job market.

- SWEET connects post-secondary graduates under 30 years of age—there is always a need to connect to businesses interested in taking on new young workers.

2.1.2 Work with the BIA and Chamber to ensure that local businesses are aware of programming such as the BC Employee Training Grant that increase skills of existing workers.

## 2.2 Workforce Inclusivity

Labour supply in Sidney can be boosted with measures to promote more workforce inclusivity focusing on First Nations, youth, women, the semi-retired and the unskilled. An inclusive labour market allows and encourages all people of working age to participate in paid work through a variety of education, training and employment tools. As a start, more primary and secondary research on barriers and opportunities is needed. Even in an era of low unemployment rates, many people of working age are underemployed or looking for opportunities to reskill to increase their incomes without committing to long-term post-secondary programs. Secondly, more businesses need to embrace workplace flexibility and innovations that will unlock new sources of labour while giving vulnerable workers a much better chance of integrating into the labour market.

# 2 People Initiatives



**Lead: SBIA + Chamber**

## **Initiatives:**

- 2.2.1 Work with local service providers such as BCS to create a tailored program that builds a more inclusive labour market while also addressing labour shortages. Sidney has a low labour force participation rate and local employers have difficulty fulfilling their labour needs. Meanwhile, federal and provincial funding programs for vulnerable groups with a weak attachment to the labour market are available. BCS provides various services for at-risk youth, those with substance abuse disorders and other vulnerable populations. A pilot program with local business and public agencies providing training, mentoring and follow-up support should be supported.
- 2.2.2 A similar opportunity should be considered in partnership with the W̱SÁNEĆ Leadership Council, the Indigenous Leadership Council and labour market service providers.

## **2.3 Childcare Access**

Sidney could position itself as a family-friendly community and provide a boost to the local labour market with greater access to childcare services. SIPP's Inclusive Economy Committee notes the importance of childcare in ensuring an inclusive economic recovery (SIPP 2020a). In Canada, 40% of parents had difficulty finding childcare services (Findlay 2019). In addition to generating labour market participation, childcare lowers child poverty rates and reliance on social assistance programs.

For Sidney, an increase in childcare spaces would directly support Civic, Cultural and Services policies identified in the OCP while underpinning efforts to draw in more working families that are able to afford rising real estate prices.

**Lead: Town of Sidney**

## **Initiatives:**

- 2.3.1 Work with Beacon Community Services and Island Health to quantify the supply-demand gap in Sidney and forecast future demand.
- 2.3.2 Identify business revitalization tax exemptions for new facilities developing daycare spaces. The City of Kamloops has had good success with its Daycare Revitalization Tax Exemption Bylaw. Richmond's Childcare Statutory Reserve Fund is also noteworthy.
- 2.3.3 Work with Beacon Community Services to explore a land swap for their 3rd Street property that will allow them to build a multi-level, multi-use development with affordable housing and a daycare facility along with their other core services.
- 2.3.4 Seek out an Early Childhood Development hub opportunity in an upcoming new residential or commercial development.
- 2.3.5 Work with BCS, non-profits and faith groups on supporting the development of new childcare spaces.



# 2 People Initiatives



## 2.4 Engagement with Indigenous Groups

The Town has set out objectives and policies in the OCP for collaboration, cooperation, and dialogue with First Nations. Many economic issues, such as employment opportunities and business development, are of concern to First Nations communities. Cooperation on initiatives that generate employment, household incomes and business activity can benefit all parties. The Town should work toward an active economic development alliance with the four neighbouring W̱SÁNEĆ nations that is focused on implementable projects aligned with:

- Objectives and policies in the OCP, in the areas of reconciliation, the economy, workforce, culture and the environment; and
- The interests, values and expectations of the W̱SÁNEĆ Leadership Council and member nations.

**Lead: SIPP, Town of Sidney**

### Initiatives:

- 2.4.1 Work with the Indigenous Prosperity Centre (IPC) to identify partnership opportunities that match Sidney’s reconciliation objectives with IPC’s economic and workforce goals.
- Participate in IPC’s pending leadership program which would contribute to many of the OCP policies set out in Chapter 4.2
  - IPC and SIPP are working toward an intellectual property framework for traditional ecological knowledge that could be

trialed in Sidney, for example with foreshore climate change mitigation and monitoring.

- 2.4.2 Collaborate with IPC and SIPP on social procurement programming as an economic development tool for Indigenous businesses. Programming is in its preliminary stages but will align with the Treasury Board of Canada’s 5% target of federal contracts going to Indigenous business.

- 2.4.3 Participate with economic development partners, Peninsula municipalities and education institutions on economic reconciliation opportunities that support OCP objectives and policies.

## 2.5 South Island Prosperity Partnership Engagement

The Town should increase its involvement in South Island Prosperity Partnership (SIPP) programs and services and ensure Sidney is represented and participates in as many regional initiatives as possible. Many local socio-economic issues exist in a broader regional context that is relevant to an understanding of cause-effect dynamics and potential courses of action. SIPP engages in First Nations, labour market, investment attraction, innovation programs and sector development that Sidney should be more involved in. More intense involvement in the regional economic development network will give the Town the opportunity to craft better resourced and more robust local economic initiatives.

# 2 People Initiatives



**Lead: Town of Sidney, SBIA and Chamber**

**Initiatives:**

2.5.1 Work with the Sidney BIA and Chamber to promote and encourage uptake among local industry and businesses of major SIPP initiatives:

- Trade Accelerator Program (TAP)
- Indigenous Prosperity Centre initiative
- Centre for Ocean Applied Sustainable Technologies (COAST)
- Micro-Credentialing & Up-Skilling initiative

2.5.2 Subscribe to SIPP'S news and updates service.

2.5.3 Invite SIPP to present the latest news and events to an EAC meeting at least once annually.

2.5.4 Request that SIPP notify the BIA/Chamber and Town of new and evolving services and programs that might be of interest to Sidney businesses and organizations.



# 3 Business Initiatives



## 3.1 Marine Industries

The Town should support the development of marine-related activity (clustered on but not exclusive to Harbour Road). The existing cluster on Harbour Road is small, but diverse and trade-based, which creates wealth for the community by serving external markets. These businesses support the Sidney by the Sea brand and amplify the Gateway to the Gulf Islands concept. Opportunities for Sidney businesses to get involved in SIPP's Centre for Ocean Applied Sustainable Technologies (COAST) and Canada's Ocean Supercluster should be encouraged.

### Lead: SBIA

#### Initiatives:

- 3.1.1 Participate in regional marine-related networks so there is better awareness of opportunities for growing the marine sector. Participation in SIPP's COAST initiative would expand the knowledge base and bring forward ideas for new projects. One of SIPP's partners on OCEAN is the Association of BC Marine Industries (ABCMI), based in Sidney.
- 3.1.2 Work with ABCMI to develop a local industry profile so there is a better understanding of retention, expansion and attraction opportunities moving forward.

3.1.3 Develop a local Blue Economy Plan for Sidney. The federal government has recently released a Blue Economy Strategy, and the Government of BC has created a new Ministry of Land, Water and Resource Stewardship with a mandate for marine and coastal protection. The OCP speaks to Indigenous partnerships, traditional aquaculture, seashore adaptation to climate change, ecotourism and marine industries. The Shaw Centre for the Salish Sea is a popular visitor attraction, while marine transportation is a major force in the local economy. A vision for a waterfront cultural hub embodies the community's ties to the ocean. All of these are potential components of a local Blue Economy Plan.

## 3.2 Visitor Economy

Diversifying the visitor economy in Sidney would leverage the community's natural and locational assets, reinforce its status as a regional shopping destination and legitimize its aspirations to be the Gateway to the Gulf Islands. The community has favourable tangible elements like the ocean, the Gulf Islands, the Gulf Islands National Park Reserve, First Nations culture and a vibrant downtown, but at the same time many travellers are simply passing through and unaware of the potential for spending time locally. The visitor economy is recovering rapidly from the COVID-19 pandemic and tourism globally is expected to renew a robust growth trajectory in the years ahead. For Sidney to grab

# 3 Business Initiatives



a share of this growth it will have to appeal to visitors seeking unforgettable and inspiring activities that touch them emotionally and connect them to the area. Aspirations to be a gateway can be partly realized through strategic promotions, but more importantly it will require more touchpoints that validate gateway status.

**Lead: SBIA**

**Initiatives:**

- 3.2.1 Develop baseline visitor and market information and share with local operators. Tourism Vancouver Island can provide guidance, access and operating expertise with consumer segmentation data and custom analytics. MobileScapes geo-fencing services can be used to draw an informed picture of current and recent past visitor activity, including volumes, length of stay, demographics and Explorer Quotient and PRIZM profiles.
- 3.2.2 Work with operators to develop a themed travel itineraries webpage on the <https://www.sidneybia.ca> website.
- 3.2.3 Encourage more operators to join Destination Greater Victoria and have more Sidney attractions and operators appear on select itineraries.

## 3.3 Business Retention and Expansion (BRE)

The Town should encourage and support the Sidney BIA and Chamber to develop and deliver a Sidney BRE program. BRE is focused on

encouraging local businesses to stay and grow in the community, generating investment, jobs, household income and taxes. It is an ongoing process that involves a combination of surveys and interviews. The goals of a BRE include gathering, analysing and reporting on local business issues, detecting ‘red flags’ such as business closures, connecting small business to resources and opportunities and providing awareness to the municipality on business climate issues like taxation and permitting that they are responsible for. A BRE would directly support the OCP policy of retaining and encouraging “small businesses ... that lend an eclectic quality to the retail experience” in the Downtown.

**Lead: SBIA**

**Initiatives:**

- 3.3.1 Re-engage the Business Walks Program which the Sidney BIA delivered up until 2019 when COVID-19 impacted the visitations.
- 3.3.2 Establish and evaluate a pilot BRE program:
  - The Town should fund the SBIA to undertake an ongoing program
  - Conduct visitation and outreach, data collection and aftercare
  - Evaluate the pilot, refine programming, and support Sidney BIA and Chamber if they expand the BRE program in the future

# 3 Business Initiatives



3.3.3 Draw on SIPP’s BRE services, which can support with expert advice, mentorship, access to training programs and connect to services like the Trade Accelerator Program or BC’s Export Navigator.

## 3.4 Research

A targeted research program on trends and economic conditions can improve the intelligence available to the Town for keeping its three business areas sustainable and positioned for future demand. Land use and employment dynamics will change over time due to local, national and macro events and trends. A research program would focus on creating up-to-date data tools to improve decision making, monitor performance and communicate with the community.

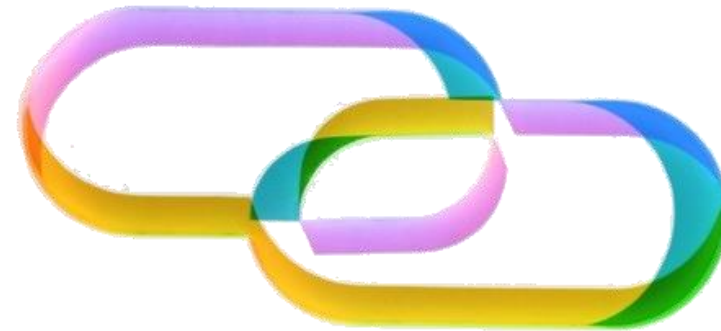
**Lead: Town of Sidney + SBIA**

### Initiatives:

- 3.4.1 Partner with the Victoria Real Estate Board, Island Health (e.g., daycare licensing and spaces), Landcor Data Corporation (the municipality has access to several indicators for free) and SIPP to obtain Sidney-specific data for dashboard reporting.
- 3.4.2 Update the Community Profile with 2021 census information.
- 3.4.3 Identify options for enhancing the Town’s business licence system into an expanded, more robust dataset. Collecting NAICs class, employment and business space would enrich the data resources the Town has at its disposal.

3.4.4 Explore non-conventional data sources that can be used for investment attraction and reporting:

- Statistics Canada establishment counts could be purchased annually and used to complement business licence data
- GIS-based alternative to Statistics Canada is business establishment data from private companies like Dun and Bradstreet and Environics

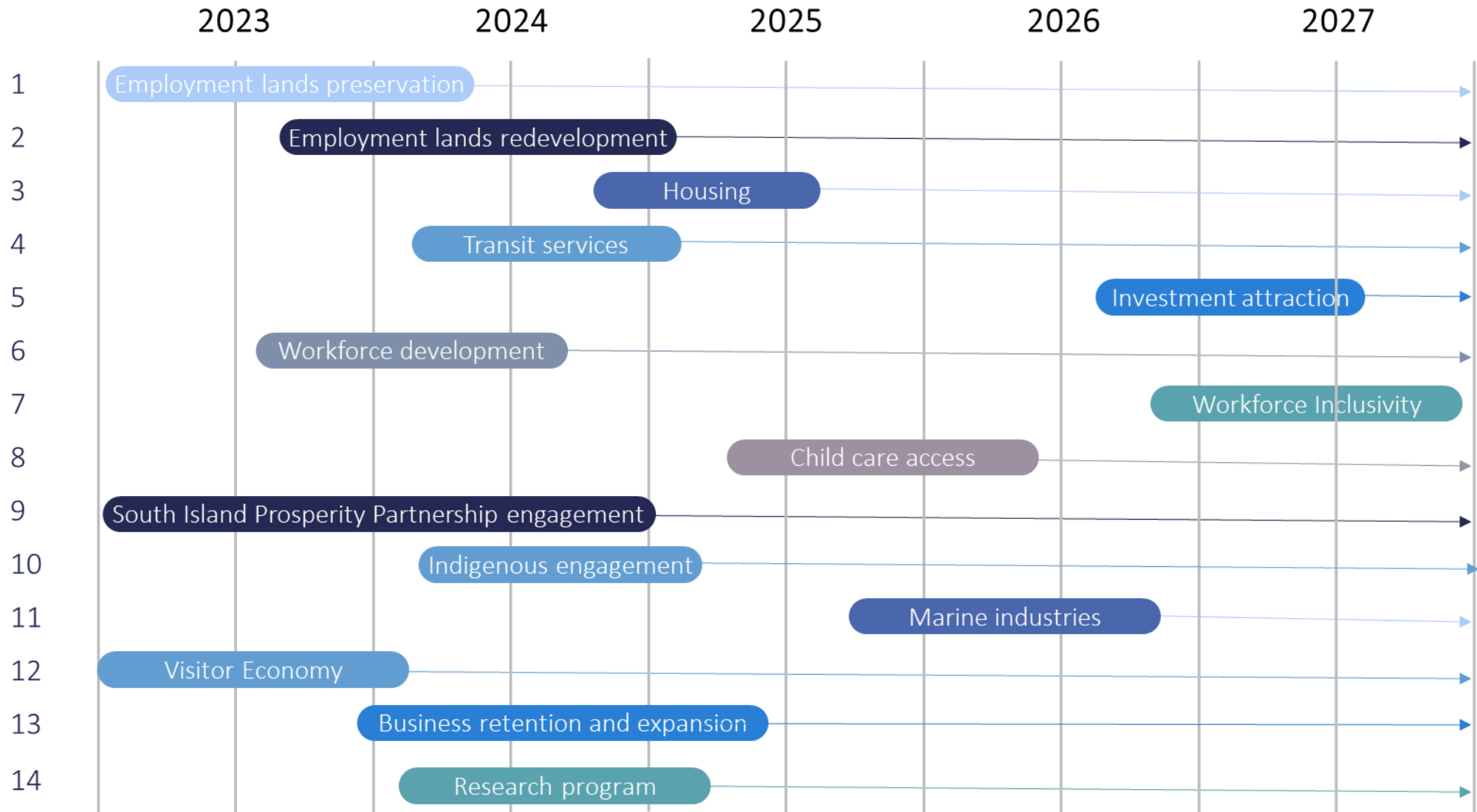




# Implementation

## Scheduling and Tracking

# Key Events – Years 1- 5



# Workplan and Evaluation

## Annual Work Plan To support Strategic Outcomes

An **annual work plan** should be prepared at the end of the year for the following year. It should identify priorities and initiatives, allocate responsibilities, identify partner organizations and detail the annual budget. It will also identify key indicators.

## Annual Reporting

The Town should report annually through the website and a short press release accomplishments from the previous work year. It can be coordinated with the Towns' own annual reporting and focus on key inputs, activities implemented and progress in meeting long-term goals. Suggested data indicators available from statistical sources, Town data, and surveys are noted below.



### Place

- Industrial/commercial/retail space
- Rents
- Housing inventory by type
- Vacancy rates
- Housing affordability measures
- Transit use
- Travel time to work
- Child care spaces



### People

- Population
- Average age
- Participation rate
- Workforce diversity
- Unemployment rate
- Clients assisted
- Programs delivered
- Partnerships established



### Business

- Business counts, diversity
- Businesses assisted
- Business startups
- Capital invested
- Jobs created/maintained
- Business satisfaction
- Website metrics





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Prepared by:

Lions Gate Consulting Inc.

Vancouver, British Columbia

# Appendix A – Current Situation Assessment

# Sidney Economic Development Strategy

## **Report 1 of 2:**

### **Current Situation Assessment**

Prepared by Lions Gate Consulting Inc.

Prepared for Town of Sidney

May 25, 2022

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## Abbreviations

AI	Artificial Intelligence
BCEDA	British Columbia Economic Development Association
BIA	Business Improvement Area
CAM	Community Asset Mapping
CMA	Census Metropolitan Area
CRD	Capital Regional District
DCC	Development Cost Charge
FCM	Federation of Canadian Municipalities
GDP	Gross Domestic Product
GHG	Green House Gas
HOG	Homeowners Grant
IoT	Internet of Things
LAP	Local Area Plan
LHA	Local Health Area
MOU	Memorandum of Understanding
NAICS	North American Industrial Classification System
OCP	Official Community Plan
RFP	Request for Proposal
RGS	Regional Growth Strategy
SCO	Strengths, Challenges and Opportunities
SIPP	South Island Prosperity Partnership
TOS	Town of Sidney
UN	United Nations
VAA	Victoria Airport Authority
VIATEC	Victoria Innovation, Advanced Technology and Entrepreneurship Council

## 1 Introduction

### 1.1 Background

The Town of Sidney is working with the South Island Prosperity Partnership (SIPP) to develop a Local Economic Development Strategy for the community. The objective of the strategy is to assess the Town's planning environment, frame it through an economic lens, consult with residents and businesses on high-level strategic direction and make recommendations for effective implementation. Identification of external resources, partners, and actors and how they can better play a role in ensuring the success of the implementation would be paramount to the outcome of this project.

SIPP and the Town initiated a Request for Proposal (RFP) process in October 2021 to secure a strategy consultant and deliver a final Strategy by June 2022. A consulting team led by Lions Gate Consulting has been commissioned prepare and deliver the strategy.

### 1.2 Purpose

This **Current Situation Assessment** is the first of two reports that will be delivered as part of this study. The **Economic Development Strategy**, which will present recommendations for action and the implementation plan, will be the second report.

### 1.3 Methodology

The methodology for this report consisted of primary and secondary research. Secondary data sources, statistics, documents and studies were compiled and synthesized to interpret economic conditions in the Town and capital region. A list of all cited references is provided in Section 5.1. The primary research consisted of two surveys conducted during February 2022. A business survey received 117 responses and the community survey 272 responses. Results are shown in Appendix A.

### 1.4 Report Structure

This report has the following chapters:

**Chapter 2** presents a snapshot of the current socio-economic conditions in Sidney and the Capital Regional District (CRD). Key demographic and economic indicators are discussed.

**Chapter 3** highlights economic development trends.

**Chapter 4** discussed investment readiness in Sidney with reference to the local planning context, tax rates, community assets, business zones, local viewpoints (survey results) and strengths, challenges and opportunities assessment.

References are listed in **Chapter 5**.

Survey results are presented in **Appendix A**.



## 2 Socio-economic Analysis

### 2.1 Population

#### 2.1.1 Historical Population

Table 1 shows the historical population for the Town of Sidney, Capital Regional District (CRD) and British Columbia between 1981 and 2020. The Town's population has grown by over 50% over the almost 40-year period. This is a slower growth rate than experienced by the CRD and the province over the same period.

**Table 1: Population and Population Change, 1986 to 2020**

	Population			Percentage Change		
	Town of Sidney	Capital Regional District	British Columbia	Town of Sidney	Capital Regional District	British Columbia
1981	8,126	255,879	2,823,930	100.0%	100.0%	100.0%
1986	9,267	275,043	3,003,620	114.0%	107.5%	106.4%
1991	10,317	307,643	3,373,785	127.0%	120.2%	119.5%
1996	11,062	331,102	3,874,315	136.1%	129.4%	137.2%
2001	11,287	340,002	4,076,880	138.9%	132.9%	144.4%
2006	11,478	355,050	4,241,795	141.3%	138.8%	150.2%
2011	11,252	367,617	4,502,105	138.5%	143.7%	159.4%
2016	11,991	400,562	4,859,250	147.6%	156.5%	172.1%
2020	12,312	425,503	5,147,710	151.5%	166.3%	182.3%

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

#### 2.1.2 Age Characteristics

Table 2 shows the age characteristics of Town residents for 2001 and 2016. The population had increased by 745 during this time, with growth concentrated in the older age demographics (45+ age classes) while the under 45 age class has declined in both absolute and relative terms.

In 2016, Sidney was characterized by its very large percentage share of population in the over 65 age class when compared to British Columbia. At almost 41%, it has twice the seniors' population share of the province.

**Table 2: Sidney Population by Age Group Compared to BC, 2001 and 2016**

	Town of Sidney				British Columbia	
	2001		2016		2001	2016
Age 0 - 19	1,985	18.2%	1,625	13.9%	25.0%	20.4%
Age 20 - 44	2,645	24.2%	2,110	18.1%	36.3%	32.1%
Age 45 - 64	2,735	25.0%	3,160	27.1%	25.1%	29.2%
Age 65+	3,565	32.6%	4,780	40.9%	13.6%	18.3%
<b>Total</b>	<b>10,930</b>	<b>100.0%</b>	<b>11,675</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Statistics Canada (2001) (2017a)

### 2.1.3 Median Age

The shift towards an older demographic is further illustrated by the change in median age over time (Table 3). Between 2001 and 2016 the median age in Sidney climbed from 50.7 years to 59.8 years. While the Capital Regional District and province have also seen their populations age, Sidney has been aging more rapidly due to the in-migration of older age cohorts.

**Table 3: Median Age in Years, 2001 to 2016**

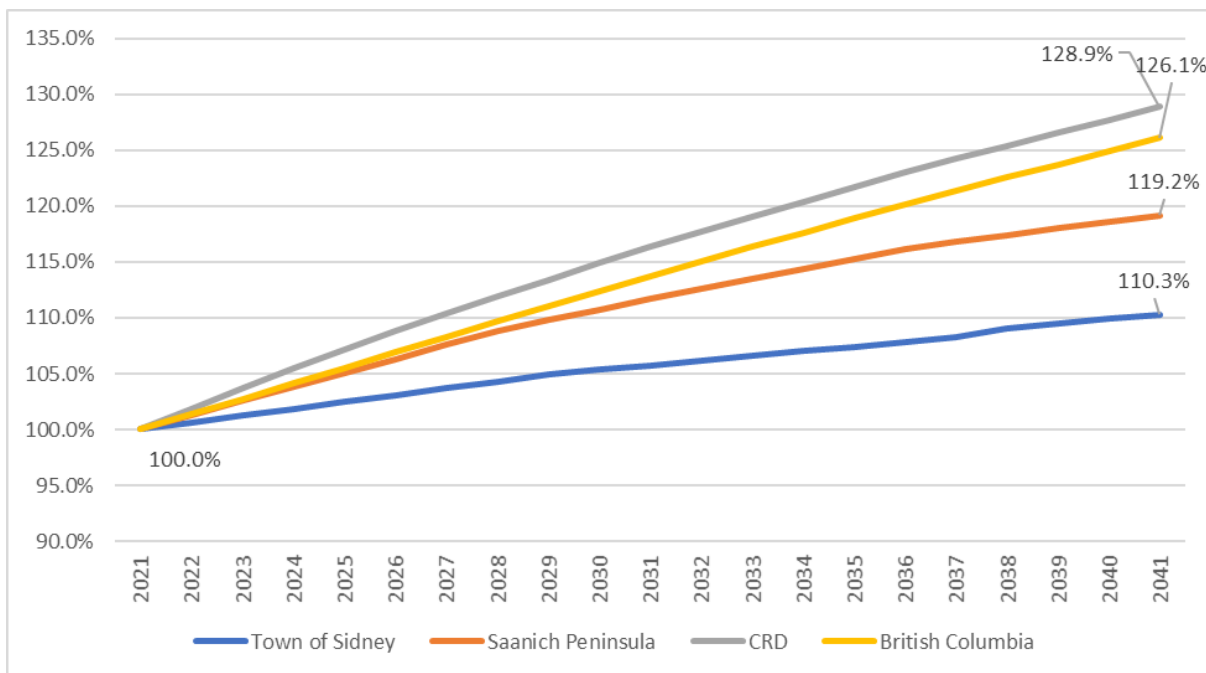
	2001	2006	2011	2016
Town of Sidney	50.7	55.0	56.9	59.8
Capital Regional District	41.4	43.6	44.8	45.5
British Columbia	38.4	40.8	41.9	43.0

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

### 2.1.4 Population Projections

The population projections shown in Figure 1 come from the BC Stats PEOPLE projection model for the Saanich Peninsula Local Health Area (LHA), CRD, and BC, while the Town of Sidney projection comes from the Town’s Official Community Planning process. The Town is expected to grow by approximately 10% over the next 20 years. In comparison, Saanich Peninsula, CRD and BC growth rates will considerably exceed that. The availability of land and housing is a key driver of population growth—as a relatively developed community its growth is not linked to new subdivision development but redevelopment through densification and infill.

**Figure 1: Population Projections, Sidney, CRD and BC, 2021-2041**



Source: BC Stats (2022); Town of Sidney (2020).

2.2 Housing

2.2.1 Owner Households

Table 4 outlines the owner households in Sidney for the past two census periods. In 2016, there were 4,245 owner households, down slightly from 4,280 in 2011. Almost half of owner households had a mortgage in 2016, a slight improvement over 2011. Approximately 17% were below the affordability standard, which is defined as spending 30% or more of their annual income on housing costs. The affordability ratio improved noticeably between 2011 and 2016, but when 2021 census housing data is released later in 2022 it may show a slippage in the ratio due to the rapid escalation in local housing prices.

**Table 4: Total Sidney Owner Households, those with Mortgage and those Below Affordability Standard, 2011 and 2016**

	2011		2016	
Owner households	4,280	100%	4,245	100.0%
Household with Mortgage	2105	49.2%	2,055	48.4%
Below the affordability standard	1,050	24.5%	710	16.7%

Source: Statistics Canada (2013) (2017a)

2.2.2 Rental Households

Table 5 outlines the renter households in Sidney in 2011 and 2016. During this period Sidney added 315 new renter households, an increase of 30.2%. Close to 7% of renter households live in subsidized housing while 47.7% lived below the affordability standard. As with owner households affordability has likely eroded since 2016 as rents have been climbing steadily across the region.

**Table 5 Total Sidney Renter Households including subsidized and Below Affordability Standard, 2011 and 2016**

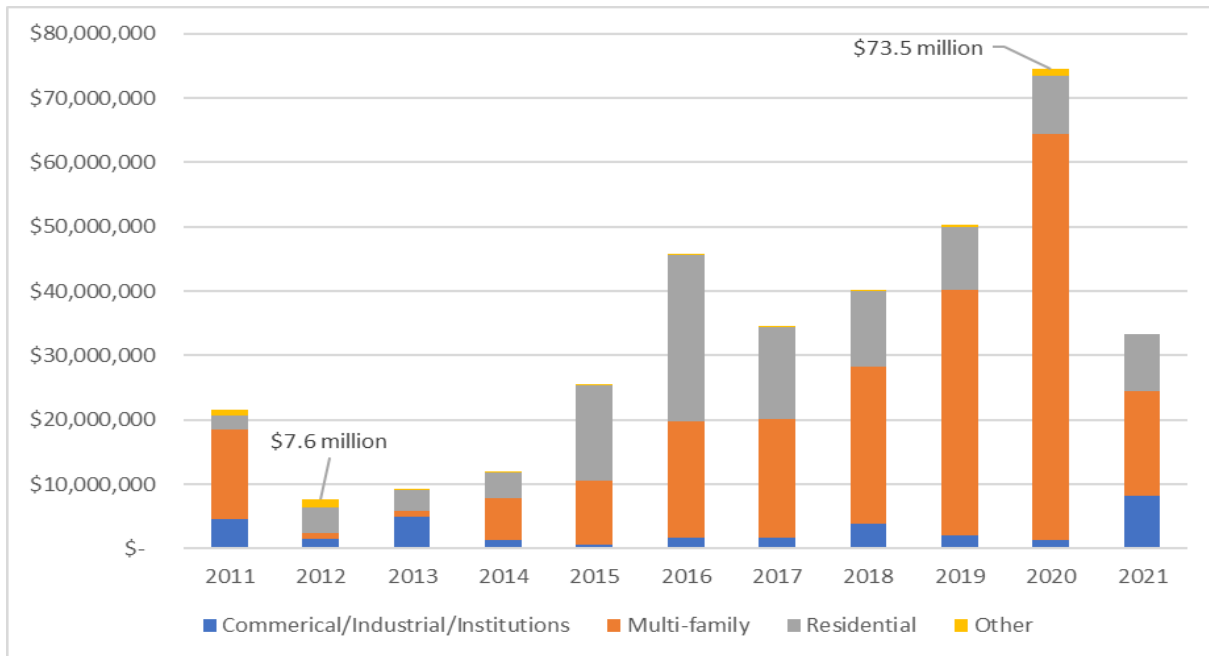
Affordability	2011		2016	
Renter households	1,040	100.0%	1,355	100.0%
Households in subsidized housing	50	4.8%	90	6.6%
Below the affordability standard	550	52.6%	5,331	47.6%

Source: Statistics Canada (2013) (2017a)

2.2.3 Building Permits and Housing Unit Construction

Building permits were on an upward trajectory between 2012 and 2020 (Figure 1), however, this changed in 2021 with a sharp decline, likely related to COVID-19 effects. Much of the construction value has been related to multi-family construction and single-family residential units. There has been minimal commercial/industrial/institutional development over the past decade.

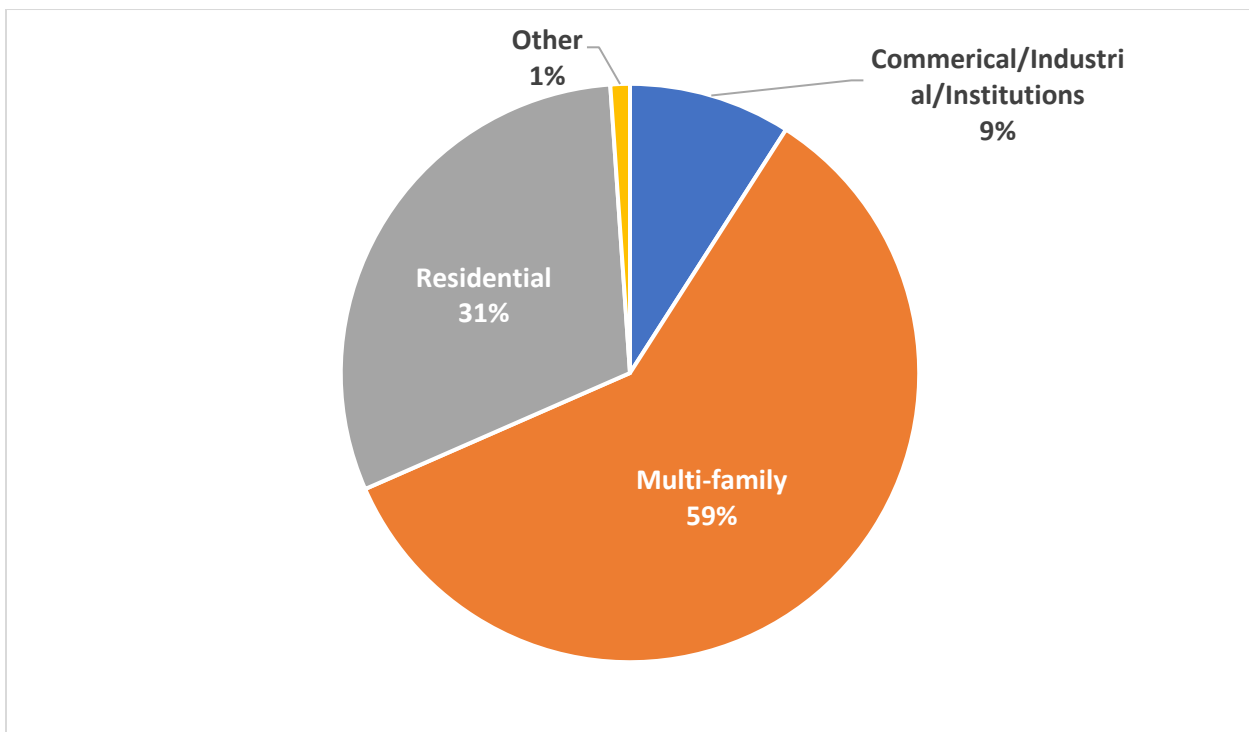
**Figure 1 Town of Sidney Building Permits \$, 2011 to 2021**



Source: Town of Sidney (2021)

Figure 2 shows the aggregate value of building permits by category between 2011 and 2021. It is noted that not all multi-family and residential developments are for new stock as a portion is for renovations.

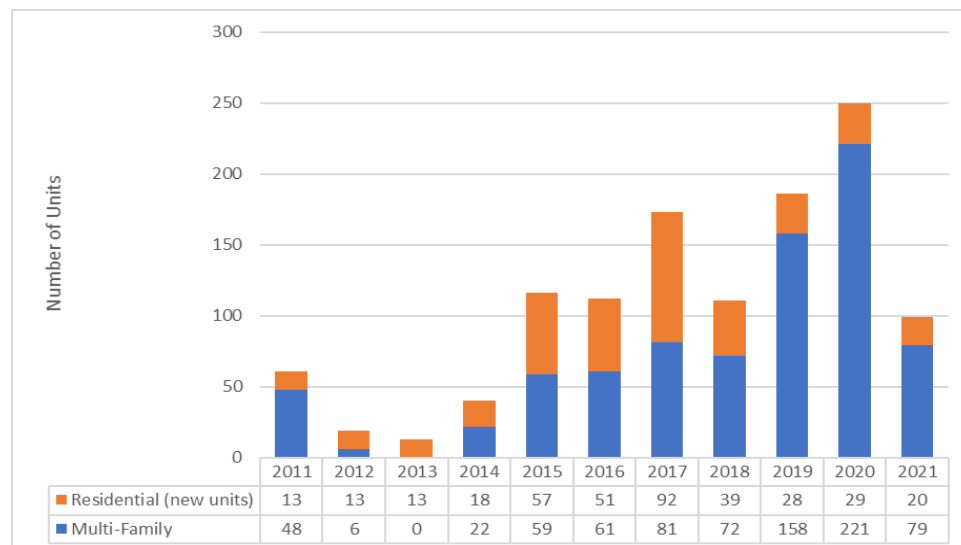
**Figure 2 Total Town of Sidney Building Permits \$, 2011 to 2021**



Source: Town of Sidney (2021)

Figure 3 shows the number of multi-family and residential units constructed between 2011 and 2021. Multi-family units have significantly outpaced the number of residential units since 2018, prior to which absolute growth for the two categories was roughly even.

**Figure 3 Total Town of Sidney Residential and Multi-Family Starts, Number of Units, 2011 to 2021**



Source: Town of Sidney (2021)

## 2.3 Income

### 2.3.1 Change in Personal Income

Median incomes for men and women in Sidney, the CRD and BC between 2005 and 2015 are shown in Table 4. In 2015, the average male income in Sidney was higher than the CRD and BC, while the average female income was higher than BC but slightly behind the CRD. Growth in income for both males and females exceeded CRD and BC growth rates during this period.

**Table 4: Median Individual Personal Income and Change, 2005 to 2015**

	2005	2010	2015	Change 2005-2015
<b>Town of Sidney</b>				
Male	\$30,020	\$37,570	\$44,995	149.9%
Female	\$19,360	\$26,315	\$31,370	162.0%
Total	\$22,825	\$30,950	\$36,685	160.7%
<b>Capital Regional District</b>				
Male	\$34,485	\$39,200	\$43,280	125.5%
Female	\$23,875	\$28,165	\$32,520	136.2%
Total	\$28,290	\$32,985	\$37,100	131.1%
<b>British Columbia</b>				
Male	\$32,375	\$35,625	\$40,370	124.7%
Female	\$20,460	\$23,625	\$27,545	134.6%
Total	\$25,720	\$28,765	\$33,010	128.3%

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

### 2.3.2 Personal Income Source

The sources of personal income in Sidney (Table 4) indicate less dependence on employment and greater reliance on government transfers (e.g., Canada Pension and Old Age Security) and “Other Market” income, which includes investment income and private retirement income. This income profile reflects the Town’s higher proportion of older age cohorts compared to the CRD and BC.

**Table 4: Personal Income Source, 2015**

	Male	Female	Total
<b>Sidney</b>			
Other Market income (%)	32.4%	33.9%	33.1%
Employment income (%)	54.4%	44.9%	49.9%
Government transfers (%)	13.2%	21.2%	17.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Capital Regional District</b>			
Other Market income (%)	23.3%	23.7%	23.5%
Employment income (%)	68.2%	62.2%	65.5%
Government transfers (%)	8.5%	14.1%	11.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>British Columbia</b>			
Other Market income (%)	18.1%	17.3%	19.1%
Employment income (%)	70.8%	74.4%	65.8%
Government transfers (%)	8.3%	15.1%	11.1%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Statistics Canada (2017a)

## 2.4 Labour Force

### 2.4.1 Goods and Services Producing Sectors

Table 6 compares Sidney’s goods-producing and service-producing labour forces and British Columbia for three census periods, 2001, 2006 and 2016. Over this fifteen-year period Sidney has seen its labour force remain relatively the same, meanwhile the province has grown by 32.60%. Its goods producing sector has declined by 4.6%. Meanwhile, the services producing sector grew by 1.1% compared to 35.9% at the provincial level.

**Table 6: Allocation of Employment to Goods and Services Production, 2001, 2011 and 2016**

Industry Class	Sidney			BC	
	2001	2006	2016	% Change 2001-2016	% Change 2001-2016
<b>Goods producing</b>	765	800	730	-4.6%	20.8%
<b>Service producing</b>	3,970	4,120	4,015	1.1%	35.9%
<b>Total</b>	<b>4,735</b>	<b>4,920</b>	<b>4,745</b>	<b>0.2%</b>	<b>32.6%</b>

Source: Statistics Canada (2001b)(2011)(2018)

## 2.4.2 Biggest Industries by Labour Force

Table 7 shows the labour force industries at the 3-digit North American Industrial Classification System (NAICS) level that have a labour force of 150 or greater in Sidney. The leader is professional, scientific and technical services. Food service and drinking place are a close second. Educational services and ambulatory health care services follow, with government services occupying six of the 12 industries.

**Table 7: Sidney Industries with Labour Forces Greater than 150, 2016**

	Male	Female	Total
541 Professional, scientific & technical services	215	215	430
722 Food services and drinking places	155	250	405
611 Educational services	90	185	280
621 Ambulatory health care services	40	245	280
561 Administrative and support services	140	95	240
238 Specialty trade contractors	175	10	190
445 Food and beverage stores	80	105	185
623 Nursing and residential care facilities	50	135	185
624 Social assistance	30	145	175
483 Water transportation	95	65	165
911 Federal government public administration	80	80	160
336 Transportation equipment manufacturing	130	30	150

Source: Statistics Canada (2018)

## 2.4.3 Occupation Shares

Table 8 indicates the share of the labour force in Sidney in 2016 by occupation rather than industry. Sales and service occupations are the largest category for both men and women. The second largest occupation group for men (26.9%) is trades, transportation and equipment operators and related occupations. For women, it is business, finance and administration occupations (25.2%).

**Table 8: Sidney's Percentage Share of Labour Force by Occupation, 2016**

	Male	Female	Total
0 Management occupations	10.8%	7.7%	9.2%
1 Business; finance and administration occupations	7.3%	25.2%	16.4%
2 Natural and applied sciences and related occupations	12.7%	2.7%	7.6%
3 Health occupations	3.2%	10.0%	6.7%
4 Occ. in ed.; law & social; community & government services	6.9%	15.8%	11.4%
5 Occupations in art; culture; recreation and sport	1.9%	3.7%	2.9%
6 Sales and service occupations	23.0%	32.0%	27.6%
7 Trades; transport, equipment operators and related occupations	26.9%	2.1%	14.3%
8 Natural resources; agriculture and related production occupations	3.0%	0.4%	1.7%
9 Occupations in manufacturing and utilities	4.3%	0.4%	2.3%
Total	100.0%	100.0%	100.0%

Source: Statistics Canada (2017a)

## 2.5 Economic Base

### 2.5.1 Key Sectors

#### **Government Administration**

Government administration labour force is detailed in Table 9 below. The government administration labour force consists of three categories including federal government public administration, provincial government, and local government. The largest sub-category is the federal government public administration with a labour force of 160 in 2016.

There are four key employers to the federal labour force including Transport Canada, who own the Victoria airport (leasing it to the Victoria Transportation Authority), and the Sidney-Anacortes ferry terminal operated by Washington State Department of Transportation. The Sidney Laboratory, also known as the Centre for Plant Health, is the Federal Government's only post-entry quarantine, research and diagnostic facility for imported plant material and along with a Canadian Coast Guard Station in Sidney support the federal labour force residing in Sidney.

Over the past 15 years employment in the federal government services sector has remained relatively stable, with defence services showing a modest increase.

The Provincial Government Legislature in neighbouring Victoria generates considerable employment associated with ministry offices located throughout the CRD. In 2016, the provincial administration labour force in the CRD was 11,840, of which 130 were residents of Sidney.

Local government employment makes up the remaining employment. While it is the smallest of the sub-categories, it has almost doubled in size over the past 15 years.

**Table 9: Sidney Government Administration Labour Force, 2001 to 2016**

	2001	2011	2016
91 Public administration	380	565	390
911 Federal government public administration	145	265	160
9111 Defence services	35	45	60
9112-9119 Other federal gov. public admin.	110	220	100
912 Provincial and territorial public admin.	175	210	130
913 Local, municipal and regional public admin.	60	85	105

Source: Statistics Canada (2001b) (2011) (2018)

#### **Transportation Services**

As noted above, Sidney is home to the Victoria International Airport, the Sidney-Anacortes ferry terminal, and is proximal to the Swartz Bay BC Ferry Terminal. The two ferry ports and the airport drive employment in the local transportation sector. They account for much of the indirect employment captured in the support activities sector as well. Total industry employment was relatively stable between 2001 and 2016 when it accounted for close to 10% of the total labour force.



**Table 10: Sidney Transportation Services Labour Force, 2001 to 2016**

	2001	2011	2016
48-49 Transportation and warehousing	405	480	445
481 Air transportation	110	125	85
483 Water transportation	130	170	165
484 Truck transportation	25	40	35
485 Transit and ground passenger transportation	75	10	40
487 Scenic and sightseeing transportation	0	10	0
488 Support activities for transportation	40	70	75
4881 Support activities for air transportation	25	55	20
4883 Support activities for water transportation	15	15	45
4884 Support activities for road transportation	0	0	10

Source: Statistics Canada (2001b) (2011) (2018)

### **Wholesale and Retail Trade**

Sidney is home to a variety of specialty, family-owned shops and retail businesses, clustered along Beacon Avenue. Food and beverage stores are the largest retail sub-sector anchored by Thriftys, Fairway Market, and Save-On-Foods grocery stores. This is followed by health and personal care stores and motor vehicle and parts dealers. Other notable retail employers include Shoppers Drug Mart and Home Hardware.

There is a small wholesale trade labour force in Sidney that is dispersed across several sub-sectors. The largest two sub-sectors are building materials and supplies and centred includes millwork supporting building construction and machinery and equipment that centres on computer and communication supplies.

**Table 11: Wholesale and Retail Trade Labour Force, 2001 to 2016**

	2001	2011	2016
41 Wholesale trade	125	120	100
416 Building material & supplies merchant wholesalers	20	25	30
417 Machinery, equip & supplies merchant wholesalers	35	20	25
44-45 Retail trade	480	645	670
441 Motor vehicle and parts dealers	60	30	90
444 Building material & garden equip & supplies dealers	10	55	70
445 Food and beverage stores	120	225	185
446 Health and personal care stores	70	70	60

Source: Statistics Canada (2001b) (2011) (2018)

### **Health Care and Social Services**

A range of health care providers, including doctors, dental clinics, optometrists, and other care providers, serve Sidney. The Saanich Peninsula Hospital extended care facility is nearby. Several senior care facilities inside the municipality and in neighbouring communities provided a full spectrum of senior services.

Table 12 shows steadily growing health care labour force over the past 15 years; in 2016 it accounted for 16% of the total labour force in Sidney.

**Table 12: Health Care and Social Services Labour Force, 2001 to 2016**

	2006	2011	2016
62 Health care and social assistance	625	685	765
621 Ambulatory health care services	140	280	280
6211 Offices of physicians	20	30	50
6212 Offices of dentists	35	50	35
6213 Offices of other health practitioners	30	50	60
6214 Out-patient care centres	20	75	65
6215 Medical and diagnostic laboratories	0	0	15
6216 Home health care services	25	55	35
6219 Other ambulatory health care services	10	0	20
622 Hospitals	245	115	125
623 Nursing and residential care facilities	155	170	185
624 Social assistance	80	120	175

Source: Statistics Canada (2001b) (2011) (2018)

### **Tourism**

Sidney's tourism sector comprises a significant hospitality industry with numerous restaurants, cafes, boutique hotels and gift shops. Tour services, marinas, museums and a thriving arts and culture community provide a variety of visitor experiences. Significant volumes of regional visitors are travelling from the Lower Mainland and Washington State by ferry. The nearby Victoria International Airport hosted a record 1.93 million passengers in 2017 (TOS 2022).

In terms of employment, the two key industries forming tourism exhibited very different growth trajectories (Table 13). Arts, entertainment and recreation declined from 195 in 2001 to 140 by 2016. Conversely, accommodation and food services grew marginally, adding 55 positions. Food services and drinking places expanded grew 25% but accommodation services dropped 25 positions. A major component of tourism spending is on accommodation, which is further linked to transportation, retail and other visitor purchases. The fact that Sidney gained accommodation employment, implies an increase in overnight stays and increase in the tourism economy. Notable employers include Travelodge, Best Western Emerald Isle, Sabhai Thai and Surly Mermaid.

**Table 13: Sidney Tourism-related Industries Labour Force, 2001, 2011, 2016**

	2001	2011	2016
<b>71 Arts, entertainment and recreation</b>	195	150	140
<b>711 Performing arts, spectator sports and related industries</b>	65	30	45
<b>712 Heritage institutions</b>	50	15	20
<b>713 Amusement, gambling and recreation industries</b>	80	105	75
<b>72 Accommodation and food services</b>	415	360	470
<b>721 Accommodation services</b>	90	90	65
<b>722 Food services and drinking places</b>	325	275	405

Source: Statistics Canada (2001b) (2011) (2018)

## 2.5.2 Employment Concentration

Location quotients are ratios that compare a community's concentration of its labour force by industry to a benchmark area, in our case here the province of BC. Table 14 shows location quotients greater than one for Sidney in 2016 and preceding census periods. A location quotient of greater than one indicates the community has a greater share of its employment in that industry than the province, and vice versa, less than one indicates proportionately less employment.

A location quotient of greater than "1" is said to signify the presence of some form of competitive advantage that underlies the economic base. In Sidney, transportation industries dominate the list, while data processing, management of companies nursing and care facilities and provincial government also exhibit high levels of job concentration. The presence of several retail and service industries in the list suggests the community is serving as a shopping destination. The four goods-producing industries are still competitive strengths, however, as a group their job concentration is slipping over time.

**Table 14: Sidney Location Quotients (Employment) >1, 2001 and 2016**

	2001	2016	Trend
483 Water transportation	11.1	10.9	↓
336 Transportation equipment manufacturing	5.9	7.6	↓
324 Petroleum and coal products manufacturing	-	3.8	↑
481 Air transportation	3.3	3.3	↔
518 Data processing, hosting, and related services	n/a	2.4	-
551 Management of companies and enterprises	-	2.1	↑
623 Nursing and residential care facilities	2.1	2.1	↔
712 Heritage institutions	6.5	2.1	↓
912 Provincial and territorial public administration	2.1	1.9	↓
515 Broadcasting (except Internet)	0.6	1.9	↑
453 Miscellaneous store retailers	1.8	1.9	↔
444 Building material and garden equipment and supplies	0.3	1.7	↑
333 Machinery manufacturing	2.2	1.6	↓
624 Social assistance	0.8	1.5	↑
911 Federal government public administration	1.5	1.5	↔
114 Fishing, hunting and trapping	1.6	1.4	↓
488 Support activities for transportation	1.6	1.4	↓
562 Waste management and remediation services	1.0	1.4	↑
523 Securities, commodity contracts, and other financial	1.0	1.4	↑
441 Motor vehicle and parts dealers	1.1	1.4	↑
532 Rental and leasing services	1.1	1.4	↑
454 Non-store retailers	1.4	1.3	↔
491 Postal service	1.9	1.3	↓
621 Ambulatory health care services	1.1	1.3	↑
451 Sporting goods, hobby, book and music stores	0.6	1.3	↑

Source: Statistics Canada (2001b) (2011) (2018)

Notes: n/a not applicable as this industry was defined after 2001

### 3 Trends Analysis

The following paragraphs discuss some of the prominent political, economic, social, technological, environmental and legal factors that are affecting economic development across the developed world. Although economic development in Sidney is closely influenced by local forces such as regional population growth, these global trends are nevertheless present across the local economy and over time exert effects on private and public investment flows at the national, provincial and industry levels.

#### 3.1 Economic

**The shift from goods to services** - The economies of industrialized, western nations continue to experience a transition away from goods production to service production due to globalization, competition from developing and emerging markets and the increasing adoption of technology systems.

**Decline of traditional resources** - The Canadian economy was built on the exploitation of extractive resources whose economic rents allowed companies to prosper, gave workers relatively high wages and helped grow communities and regions. In BC, this trend is manifest in the decline in our forestry and fishing industries.

**COVID-19** – the pandemic has induced or hastened changes in shopping behavior that will permanently alter consumer businesses and, importantly, how communities plan around location needs. The shift to online retail and e-commerce is real and is expected to stick. What this means for high streets and downtowns is not yet clear but persistent retail vacancies suggest new solutions are needed.

**Rebalancing supply chains** – Every industry is now facing new risk management challenges as they navigate around long, complicated and over-vulnerable supply chains. The current car computer chip shortage is an indication of what happens when a single country or even a single factory suspends activity. According to McKinsey, a consultancy, as much as a quarter of global goods exports, or \$4.5 trillion, could shift by 2025. This will open opportunities for domestic entrants into national supply chains as managers attempt to strengthen their supply chain relationships. (McKinsey 2021)

**Gig Workers** - New research shows that 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, or contractors. 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, for example increasing the number of home-based businesses and forced employers to be more flexible in their hiring and recruitment policies.

#### 3.2 Social

**Demographic Change** – As Baby Boomers continue retiring, Millennials represent the largest growing pool of workers and are a substantial economic asset for regions. To retain and attract this generation the focus needs to be on equal parts economic opportunity and quality of place, with an emphasis on communities where people can live, work and play (Robinson 2017).

**The pace of technological change** – Technology is having dramatic effects on human society and social systems. The way people interact and communicate is much different today than even a decade ago.

Socially, the implications are not yet clear as measuring change has proved challenging. Preparing for opportunities will help the economy but there will also be a need to create healthy urban systems and communities.

**Deurbanization** - Technology has leveled the playing field for smaller cities and regions to compete for investment and talent, however other factors are helping to drive 'deurbanization' of the world's cities. In early 2021, Stats Canada reported that the country's biggest cities like Montreal and Toronto lost population as residents chose smaller cities like Kitchener-Cambridge-Waterloo, Kelowna, Calgary 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.

**COVID-19** - The world is experiencing unprecedented disruption as COVID-19 continues to blanket the planet with a health pandemic. In Canada, the pandemic has resulted in increased deaths, decreased immigration and delayed family planning which will alter the demographic make up of the country in the years ahead. Demographic and social change will also impact employment and interprovincial migration and may exacerbate growing labour shortages in many industries, especially those relying on foreign workers.

### 3.3 Technological

**Industrial Evolution and the Era of Digital Transformation** - Technology continues to transform the world, disrupting almost every aspect of human life. For cities, planning within this scope of constant change is complex. The Fourth Industrial Revolution refers to the blurring boundaries between the physical, digital and biological worlds due to digitally transformative technologies like artificial intelligence (AI), robotics, the Internet of Things (IoT), 3D printing, genetic engineering and quantum computing. From a social, economic and overall planning perspective, the sources and pace of change is being driven by the adoption of technologies across all industries.

**The Internet of Things and Industrial Internet of Things** - The IoT is the interconnection between physical devices, from handhelds to buildings to equipment, that contain various electronic systems (sensors, actuators, etc.) and software that enables them to collect and exchange data – like a digital nervous system. The future of more stable economic systems, especially for cities and regions, will be more closely tied to digital systems supported by IoT/IIoT backbones.

**Blockchain and Cryptocurrencies (Fintech)** – Blockchain is a distributed, encrypted database model that many people know is the technology that underpins Bitcoin and other cryptocurrencies. However, it has much broader potential uses for digital “smart” contracts, logistics and supply chain provenance and security, and protection against identity theft.

**Automation, Artificial Intelligence and Machine Learning** - Artificial intelligence systems are already integrated into the everyday lives of billions of humans through almost everything they engage with, from personal computers and smart phones to the evolution of self-driving cars. Along with automation and robotics, these technologies are also transforming how almost all industries function – including and especially manufacturing and how supply chains function, health care/health sciences, agriculture and food production, etc.

**Communications infrastructure** - Communities connected to fast broadband are creating new opportunities beyond the reach of the local economic base. It enables connections to the information economy allowing for remote work for citizens and connections to online learning. It connects to the engine of electronic commerce enabling SME's to move significant volumes of data on a regular basis (creative economy, high tech, etc.). (Smith 2017, Ismail 2018)

### 3.4 Environment

**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.

**Climate Change Adaptation** - 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. Those investments are critical to helping local communities adapt to the changing climate. (FCM 2020)

## 4 Investment Readiness

This chapter looks at Sidney’s strategic assets, services, planning environment and perceptions by stakeholders to assess its overall investment readiness. This context and the associated insights will guide the formulation of the Strategy in the next report.

### 4.1 Prosperity Index for Sidney

SIPP has prepared and tracks an index of prosperity indicators for the capital region (Table 15). As a smaller municipality, some of the table data are not available for Sidney; those that are include measures of economic resiliency, transportation and mobility, and housing affordability. Many indicators are drawn from the 2016 Census and are only reported for the one period and compared against the similar metric for the Victoria CMA. Statistics Canada will be slowly releasing 2021 census products over the next 18 months so many of these indicators will need to be updated accordingly.

**Table 15: Town of Sidney and Victoria CMA Prosperity Index**

	Sidney	Victoria CMA
<b>Economic Resiliency Indicators</b>		
Unemployment rate	4.4% (2016)	5.6% (2016) 5.6% (2020)
Percentage of labour force employed in technology	9.0% (2016)	7.0% (2016)
Median household income	\$63,840 (2015)	\$70,285 (2015)
Prevalence of low income	5.7% (2016)	9.0% (2016)
Postsecondary certificate, diploma or degree	57.8% (2016)	59.6% (2016)
Housing of new homes under construction per 100,000	1,876 (2021)	380 (2020)
<b>Equity and Inclusion</b>		
Labour force commuting less than 15 minutes	45.5% (2016)	29.8% (2016)
Immigrant population	21.8% (2016)	18.3% (2016)
Gini coefficient for income inequality (0-1 with 0 being perfect equality)	n/a	0.40
Number of physicians per 100,000 population	97 (2021)	364 (2020)
Spending less than 30% of income on shelter costs	75.8% (2016)	71.5% (2016)
Apartment vacancy rates	n/a	0.5%
<b>Environmental Prosperity</b>		
Percentage of total energy derived from renewable sources, as a share of the city’s total energy consumption	n/a	40.0%
Fine particulate matter (PM2.5) concentration	n/a	5.4
Greenhouse gas (GHG) emissions, tonnes per capita	n/a	1.75
Percentage of commuters using a travel mode to work other than a personal vehicle	27.8% (2016)	27.0% (2016)
Percentage of commuters walking and biking to work	17.9% (2016)	16.9% (2016)
Annual number of annual public transport trips per capita	n/a	83

Source: Statistics Canada (2017a) (2022); VILocal (2022)

Note: n/a not available



## 4.2 Local Planning Context

### 4.2.1 Official Community Plan

The Town's Official Community Plan (OCP) is currently being updated and a draft plan published March 1, 2022 is currently being reviewed. Six distinct goals were developed to guide the direction of the OCP. Each of these goals forms the heading for one of the policy chapters. The OCP supports economic development through a range of policies and objectives under the goal of *'a diverse and balanced community supporting a thriving local economy.'*

The OCP Vision supports economic development in Sidney through the following:

- a lively and welcoming seaside town at the commercial heart of the Saanich Peninsula;
- a vibrant downtown;
- a thriving local economy;
- a healthy, diverse community, housing choice and supportive amenities that emphasize health, happiness and prosperity at all stages of life;
- a friendly, inclusive community; and
- a strengthened relationship with W̱SÁNEĆ peoples.

The supportive economic development objectives and policies are outlined in Table 16. Economic development policies are meant to support other OCP policy targets, including a regionally connected, vibrant downtown and evolving, connected neighbourhoods.

**Table 16: Economic Development Policies and Objectives in Sidney's OCP**

<b>Official Community Plan (Sidney OCP, content draft, March 1, 2022) Economic Development Policies and Objectives</b>
<p><b>Objectives:</b></p> <ul style="list-style-type: none"><li>• To foster an increasingly diverse and balanced demographic make-up in Sidney.</li><li>• To maintain and enhance Sidney as the commercial centre for the northern segment of the Saanich Peninsula.</li><li>• To make effective and efficient use of available industrial lands, seeking to attract and accommodate high quality employment-intensive industries.</li><li>• To encourage the continued operation and enhancement of existing industries that are viable and in locations that are to remain designated for industrial use.</li><li>• To support value-added industries and employment opportunities.</li><li>• To encourage industrial and commercial development that achieves high standards of sustainability including energy efficiency and the use of renewable energy, low carbon emissions, conserves potable water, and minimizes the use of materials and the generation of waste and pollution.</li><li>• To permit and maintain convenient Neighbourhood Commercial development in residential areas that is compatible in form and scale with the surrounding residential neighbourhood.</li><li>• To improve the visual image of commercial areas visible from Highway 17 and ensure that their future development provides an enhanced gateway into Sidney, including high-quality landscaping.</li></ul>

## **Policies:**

### **Partnerships**

- With W̱ SÁNEĆ communities and other Saanich Peninsula municipalities, identify lands that may be suitable for economic development projects that meet the needs of Indigenous communities on the Saanich Peninsula.
- Partner with W̱ SÁNEĆ communities and other Saanich Peninsula municipalities to identify joint economic development initiatives that benefit all parties.
- Continue to work with the Victoria Airport Authority (VAA) to promote appropriate quality development on VAA lands adjacent to the Town's Industrial area and periodically update the Memorandum of Understanding on Land Use and Development Guidelines between the Town and VAA.
- Work collectively with Harbour Road stakeholders to enhance economic opportunities for the harbour as part of ongoing economic development for the area.
- Encourage property owners and businesses to take advantage of eco-tourism and cultural tourism opportunities that may arise in the Harbour Road Marine Industrial area so long as they are subordinate and supportive of the marine industrial focus of the area.
- Support the business community through continuing to work with organizations such as the Saanich Peninsula Chamber of Commerce, the Sidney Business Improvement Area Society (BIA), and the South Island Prosperity Partnership.

### **Housing**

- Encourage the development, design and distribution of housing for a variety of persons and needs throughout the community (rather than concentrated within a single area).
- Prioritize adding more Multi-unit Residential uses to the West Sidney Village with a focus on affordable workforce housing.

### **Transportation**

- Facilitate efficient goods movement and the safe operation of commercial trucks and traffic within Sidney and to/from the West Side Industrial area, Harbour Road Marine Industrial area and Downtown Sidney.
- Work with and support Tourism Victoria with promoting regional cycling tours along the Saanich Peninsula and Downtown Sidney.
- Work with the Downtown business community to improve, retrofit, and expand existing short-term bicycle parking in the form of racks, bicycle corrals, or covered / sheltered parking. Consider options for long-term bicycle parking, where demand exists.

### **Demographics**

- Develop programs support housing and invest in assets and infrastructure that support a balanced demographic in Sidney, with a focus on children, youth and elder-friendly features.

### **Industrial**

- Support efforts to attract new business to the community to diversity the industrial area and achieving overall economic stability, resiliency and job security for the local employment base.

- Ensure industrial activity does not adversely affect proximate residential uses where they already exist and locate new residential development where it is compatible with industrial and commercial uses.
- Only allow commercial uses in industrial areas where they are ancillary to the industrial use and where they do not dilute the Industrial character of the area, nor detract from the functions of the commercial core and West Sidney Village.
- Require industrial uses that may have a greater impact on the environment and surrounding area to undertake a mitigation study to ensure that no negative land use issues result.
- Industrial and commercial uses will be limited to those which maintain or support the marine-industrial orientation of the Harbour Road Marine Industrial Area.
- All residential uses within and adjacent to the Harbour Road Marine Industrial area will be subject to a Restrictive Covenant expressing knowledge of the marine industrial and marine commercial uses that are currently or will be established along Harbour Road.
- Support opportunities to meet the needs of local industry, while enhancing education, training, and employment opportunities for local youth to join skilled trades.
- Update the zoning bylaw to support the relocation or establishment of businesses that support the industrial sector in the West Sidney Village area, preserving most of the existing industrial land for industrial uses.
- Allow and encourage high-tech and light industrial uses in Sidney's light industrial areas.

#### **Infrastructure**

- Continue to monitor the infrastructure needs of the Town's industrial areas and industries, ensuring a complete understanding of the needs for utility demands and the flow of goods to and from industrial facilities both in the present and what is projected in the future. Maintain ongoing communication with the business community to ensure an adequate understanding of their needs.
- Work with communication infrastructure providers to upgrade technologies and improve the speed and reliability of internet and phone connections.
- Carefully consider the appropriate location of telecommunication towers and other infrastructure. Where warranted, encourage (or when appropriate require) owners of taller buildings to provide space for communications infrastructure.

#### **West Side Local Area Plan**

- Continue to implement the vision, goals, principles and recommendations of the West Side Local Area Plan.

Source: Town of Sidney (2022)

#### **4.2.2 Westside Local Area Plan**

The Westside Local Area Plan (Westside LAP), included in the OCP, defines how the “West Side Business Park” will grow and change over time. The West Side is one of Sidney’s main employment districts, within which the ‘Westside LAP’ represents a distinct mix of land uses, with approximately 120 residential homes and 280 residents adjacent to over 28 hectares of industrial lands. It is bounded by the airport, District of North Saanich and Highway 17—it is currently branded as the West Sidney Business Park. The Sandown site in North Saanich and the VAA lands located at southwest corner of

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Highway 17 and Beacon Ave. West are both targeted for large scale commercial development, which would have significant impacts on the West Side.

The Westside LAP sets out a vision as a bustling, innovation district with a thriving industrial and high-tech economy. While its heart is the employment-generating activity, the area is most recognizable by its pioneering mixed-use village, which provides hundreds of housing units and acts as a platform for local high-tech and light industrial start-ups. The district will develop a strong sense of place, with a network of shared streets, greenways, and parks found in the mixed-use village.

The Westside LAP sets out 5 Principles for future development:

- 1) Economic Vitality and Resiliency
- 2) Active Transportation and Connectivity
- 3) Transportation Efficiency
- 4) Attainable Housing Options
- 5) Low-Impact Development

The primary focus of the plan is on future transportation infrastructure (public investment) and land use (private investment) in the area. Six Key Changes are identified in the Plan:

- 1) Establishing an innovative Mixed-Use Village in the existing residential area.
- 2) Creating a strong gateway to the neighbourhood along Galaran Road.
- 3) Improving the existing path along the highway and strengthening connections to/from the area.
- 4) Developing an industrial area parklet program, to create more 'people spaces' for employees on the West Side.
- 5) Facilitate Galaran Road as a more pedestrian friendly street by pushing more heavy trucks onto McDonald Park Road.
- 6) Developing tailored industrial street improvements throughout the West Side to better meet the diverse needs of the neighbourhood.

The Westside LAP aims to protect and enhance the employment generation potential of the area while addressing the significant demand for workforce and affordable housing and creating an attractive and resilient mixed-use precinct with a strong sense of place where many people will enjoy living and working.

#### 4.2.3 Regional Growth Strategy

The Capital Regional District's Regional Growth Strategy (RGS) is a framework for development by municipalities and the CRD in partnership, for managing social, economic and environmental objectives (Table 17).

The RGS designates Sidney as a 'sub-regional node' of the Capital Regional District - a key contributing factor to the policy directions in Sidney's OCP. Indeed, that the OCP aligns with the purpose and goals of the Regional Growth Strategy (RGS) is a requirement mandated by the Local Government Act. For Sidney this means:

- a significant reduction in community-based greenhouse gas emissions;
- accommodating much of the Saanich Peninsula's future growth in order to keep urban settlement in the region compact and protect the integrity of North and Central Saanich rural communities;

- foster a resilient food and agricultural community in North and Central Saanich;
- protect, conserve and manage ecosystem health;
- strengthen Sidney as a safe and complete community;
- build more affordable housing;
- extend the active transportation network and transit system to increase transportation choice; and,
- continue to strengthen the regional economy.

**Table 17: RGS Economic Development Considerations and Policies**

Capital Regional District RGS Economic Development Considerations and Goals
<p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• Finding ways to work collaboratively on regional economic development considerations, including cooperation with First Nations;</li> <li>• Finding ways to address the shortage of designated space-extensive industrial/business land in the region in locations consistent with overall goals regarding community completeness, transportation balance, and a network of major centres within an urban containment boundary;</li> <li>• Finding ways to enhance established employment centres;</li> <li>• Finding ways to integrate high-value, clean industry and business in complete communities;</li> <li>• Finding ways to attract, develop and maintain a highly skilled workforce.</li> </ul>
<p><b>Policies:</b></p> <ol style="list-style-type: none"> <li>1. Collaboratively build on the region’s economic, environmental and quality of life advantages to position the region as a highly desirable location for investing in existing and new businesses, working to address the economic development considerations identified above.</li> <li>2. Provide for land development patterns that maintain an adequate supply of employment land, industrial land, transportation infrastructure and services to support a diverse regional economy.</li> <li>3. Prioritize the attraction of new businesses and investment that will support climate action, while supporting the retention and growth of existing businesses and economic activities in the region.</li> </ol>

Source: Capital Regional District (2018)

#### 4.2.4 Corporate Plan (2021-2022 Town of Sidney Strategic Plan)

Sidney’s corporate strategic plan identifies Council priorities for the current period of 2018- 2022 term of office.

The overarching goals are:

- Complete Community – striving to be a complete community with a mix of amenities and a quality living environment;
- Environmental Stewardship - being stewards of our environment;
- Economic Vibrancy - continuing to adapt and prosper as a diverse commercial centre for business and employment;
- Community Engagement - strive to engage the public in its decision-making processes;
- Organizational Excellence - remaining a leading organization in the provision of governance and quality services; and
- Community Infrastructure - the Town will be a leader in the management of its assets.

The Plan has a strategic priority of *reviewing the Town's role and resources currently dedicated to fostering economic vibrancy*, and the following supporting actions:

- Support business community throughout the COVID-19 pandemic;
- Strengthen relationship with the business community including the Sidney Business Improvement Area Society and Saanich Peninsula Chamber of Commerce; and
- Work with service providers to improve internet and cellular services throughout the community.

Several other strategic actions in the Plan support economic development, such as:

- Affordable housing – looking for opportunities to collaborate with partners;
- Community Engagement - building meaningful public engagement into all key Town initiatives, and collaboration with neighbouring municipalities;
- Organizational Excellence – conducting a taxation policy review, and reviewing and updating the Development Cost Charge bylaw; and
- Community Infrastructure – implementing asset management plan.

#### 4.2.5 Sidney Business Improvement Area

Businesses in the downtown core are members of the Sidney Business Improvement Area (BIA). The BIA markets and promotes economic growth to the Sidney BIA District, and works closely with members, community partners and the Town of Sidney to market Sidney as a destination, and to support its members in the areas of enhancing collaboration in the local business community, and business development support services. The BIA produced a Retail Gap Analysis (2017) that identifies deficiencies and surpluses in the supply of retail establishments in the downtown commercial district, as well as an examination of retail opportunities.

BIA programs and services are as follows:

- Small business education in the form of courses and seminars (social media, digital marketing communications, e-commerce and other topics);
- Creating an interactive online community profile of local business and community data;
- Helping businesses access resources and grant opportunities;
- Marketing Sidney businesses and the tourism sector;
- Producing a “Welcome to Sidney Guide” for new local businesses;
- Assisting businesses in Covid-19 business recovery efforts; and
- Leveraging grant money from the Community Economic Recovery Infrastructure Program to support the hospitality and tourism sectors.

#### 4.2.6 Saanich Peninsula Chamber of Commerce

The Saanich Peninsula Chamber of Commerce is a membership-based organization and the voice of business on the Saanich peninsula, offering support, resources and engagement opportunities for local businesses. The Chamber supports economic development and business interests and builds strategic relationships between the business community and its stakeholders. Serving over 300 members on the Peninsula, the Chamber offering a variety of services and benefits that include cost-savings measures, marketing, tourism and public relations opportunities, and workshops, training and seminars.

### 4.3 Taxation

#### 4.3.1 Mill Rate and Total Tax Charge Comparison

The Town's residential mill rate, resident share of property tax and total taxes and charges for residential property are shown in Table 18, with comparative data for CRD municipalities. Sidney ranks in the middle regarding Total Taxes and Charges for residential property in the CRD at \$4,508 in 2021. The residential mill rate is at the lower end of the scale.

The Town, like the other CRD municipalities, is highly dependent (72%) on residential property taxes. Victoria, with its large government office and business tax base, is an exception.

**Table 18: Municipal Comparisons for Total Taxes and Charges (2021)**

Municipality	Total 2021 Residential Mill Rates	Residential Percentage Share of Total Property Tax	2021 Total Taxes and Charges
City of Langford	4.7809	67%	3,318
District of Metchosin	3.9447	90%	3,427
Town of View Royal	4.21543	70%	3,961
City of Colwood	5.1573	77%	3,999
District of Highlands	4.5819	74%	4,073
<b>Town of Sidney</b>	<b>4.49024</b>	<b>72%</b>	<b>4,508</b>
District of Esquimalt	5.7875	75%	4,513
District of North Saanich	3.494	69%	4,541
District of Central Saanich	5.0072	77%	5,199
City of Victoria	5.0976	52%	5,758
District of Saanich	5.01344	75%	6,069
District of Oak Bay	4.96334	94%	8,757

Source: BC Ministry of Municipal Affairs (2022a)

#### 4.3.2 Number of Property Claimants Over 65 Years

An important component when looking at property tax charges is the number of homeowners on fixed incomes or no longer working. In Sidney 65% of all homeowners are over the age of 65. This is almost twice the provincial average and markedly higher share than other municipalities in the CRD. Table 19 highlights the total claimant numbers for the Homeowners Grant (HOG) for those under and over the age of 65 years old.

**Table 19: Municipal Comparisons for Number of Property Claimants Over the 65 Years of Age (2018)**

Municipalities	Claimants over 65 No. of Properties	Claimants Under 65 No. of Properties	Total No of Properties	Share over 65 years
Central Saanich	2,329	2,792	5,121	45%
Colwood	1,687	3,024	4,711	36%

Highlands	203	522	725	28%
Langford	2,694	7,471	10,165	27%
Metchosin	655	732	1,387	47%
North Saanich	2,012	1,660	3,672	55%
Oak Bay	2,480	2,081	4,561	54%
Saanich	13,066	17,264	30,330	43%
<b>Sidney</b>	<b>2,706</b>	<b>1,467</b>	<b>4,173</b>	<b>65%</b>
Victoria	7,385	10,074	17,459	42%
View Royal	1,095	1,854	2,949	37%
<b>BC Total</b>	<b>353,517</b>	<b>625,516</b>	<b>979,033</b>	<b>36%</b>

Source: BC Ministry of Municipal Affairs (2022b)

#### 4.4 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. Most people would recognize important resource and built assets, but less tangible human, social and organizational capital can also be a foundation for community development and positive change.

Assets are listed into four major groups:

- **Natural:** inherent biophysical features, including natural resources and animal life.
- **Infrastructure:** human-built facilities meant to support socio-economic activities.
- **Economic:** characteristics contributing to the production or consumption of goods and services.
- **Socio-community:** elements contributing to the human context, including services, organizations, associations and networks that define the social fabric and sense of community.

Table 20 outlines Sidney's main community assets. It is a complete community with a waterfront, marinas, ferry terminals, Bevan fishing pier, the Shaw Centre aquarium, Mary Winspear Centre, community centres, and Beacon Avenue shopping district. These recreational, tourism and transportation assets appeal to residents and are responsible for population growth and diversity.

Sidney's socio-community capital is defined by a strong network of community groups and associations, social service, and places of worship. Key assets include a vibrant Arts Council, the SHOAL Centre, various service groups, and a strong BIA. An important element to creating a sustainable future for Sidney is its relationship and linkages to First Nations on the Peninsula. Sidney is on a path of reconciliation and laying the foundation for building a closer relationship with the W̱SÁNEĆ Leadership Council.

#### Table 20: Town of Sidney Community Assets



Infrastructure	Socio-community
<ul style="list-style-type: none"> <li>• Sidney Municipal Hall</li> <li>• Sidney Public Works Yard</li> <li>• Panorama Recreation Centre (North Saanich)</li> <li>• Greenglade Community Centre</li> <li>• Mary Winspear Centre</li> <li>• Lochside Trail</li> <li>• Washington State Ferry Terminal</li> <li>• Sidney Spit Ferry</li> <li>• Port Sidney Marina</li> <li>• Iroquois Park recreation facilities</li> <li>• Tulista Park recreation facilities</li> <li>• Beacon Warf</li> <li>• Beacon Park Bandshell</li> <li>• Bevan Fishing Pier</li> <li>• Public Art and Sculptures</li> <li>• Sidney Elementary School</li> <li>• Tsehum Harbour Federal Government Wharf</li> <li>• Sidney/North Saanich Branch, Vancouver Island Regional Library</li> <li>• Road Network and Highway 17</li> </ul>	<ul style="list-style-type: none"> <li>• First Nations/WSÁNEĆ Leadership Council</li> <li>• Saanich Peninsula Legion</li> <li>• ArtsSea Community Arts Council</li> <li>• Saanich Peninsula Chamber of Commerce</li> <li>• Sidney BIA</li> <li>• Sidney Museum and Archives</li> <li>• Beacon Community Services</li> <li>• Saanich Peninsula Lions Food Bank</li> <li>• The SHOAL Centre Independent Living</li> <li>• St. Elizabeth Church</li> <li>• Highway Christian Fellowship</li> <li>• St. Andrew Anglican Church</li> <li>• St. Paul’s United Church</li> <li>• Neighbourhood House</li> <li>• Island Health Authority Sidney Satellite</li> <li>• RCMP</li> </ul>
Economic	Natural
<ul style="list-style-type: none"> <li>• Transportation infrastructure and linkages – highway, ferry and airport access</li> <li>• West Side Industrial District</li> <li>• Downtown Sidney Commercial Area</li> <li>• Harbour Road Marine Industrial District</li> <li>• Beacon Avenue Retail</li> <li>• The Shaw Centre aquarium</li> <li>• Mary Winspear Centre</li> </ul>	<ul style="list-style-type: none"> <li>• Sidney Waterfront/Walkway and Beach Access</li> <li>• Roberts Bay – Shoal Harbour Migratory Bird Sanctuary</li> <li>• Sealife</li> <li>• 10 km of shoreline</li> <li>• Numerous parks (28 in total) and beach accesses (17), and paths and trails</li> </ul>

Sidney’s economic infrastructure is foundational to its ability to expand and diversify its local economy. The land, services and amenities in the three business districts provide locational characteristics that appeal to different clusters of business. Unlike many communities across Canada, the downtown is diverse and vibrant and remains a regional retail and shopping destination. The industrial and mixed commercial uses in West Side are leveraged by strong transportation infrastructure, which allows for the convenient movement of goods and people in and out of the community. In its 2021 Corporate Survey, Area Development Magazine found highway accessibility the second most important site selection for new and expanded facility development (Area Development 2021).

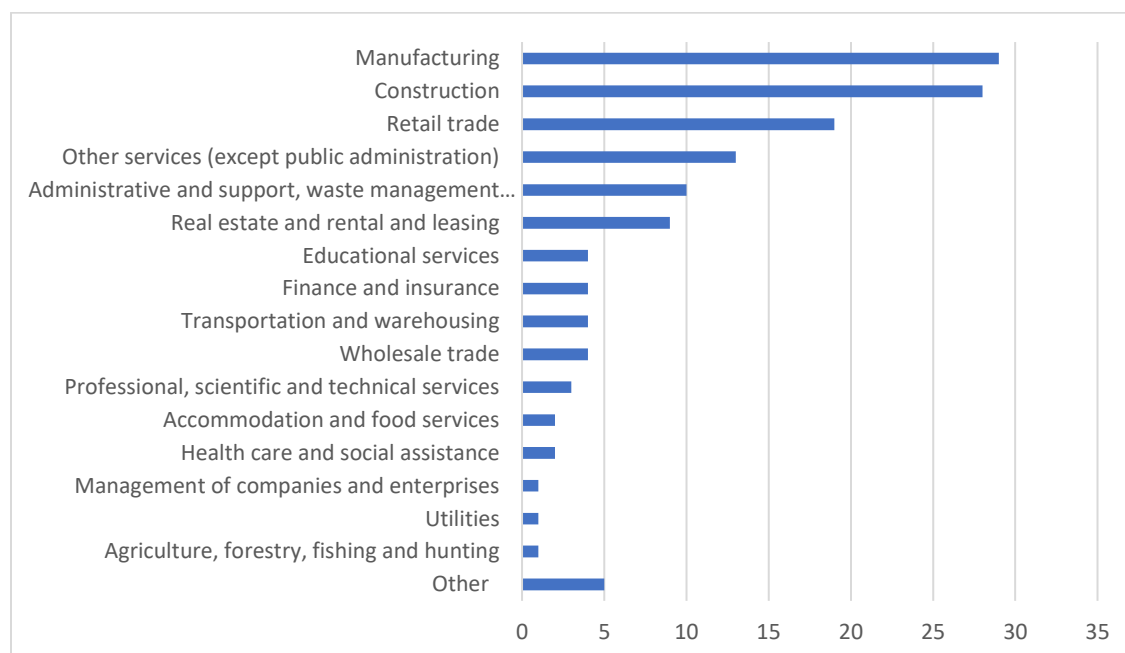
The Town is characterized by an abundance of natural resources, unique landscape and location on the Salish Sea. Ten kilometres of waterfront, a protected shoreline, numerous parks and beachfront accesses, extensive trails and greenspace, a bird sanctuary make for a natural environment that is central to the community’s sense of place and quality of life and offers opportunities for visitor experiences.

#### 4.5 Business Districts

Sidney has three main business districts encompassing the Westside Industrial Business Park, Harbour Road Marine Business Park and the Downtown, all of which are economic generators for the local economy.

The **West Side**, Sidney's main business district, is located on the west side of Highway 17. It is an area of mixed land use with an emphasis on light to medium industrial serving local and international markets. A count of businesses by industry in 2021 is shown in Figure 4. Manufacturing, construction and retail establishments are the top three industries. Manufacturing activities include metal fabrication, machinery manufacturing and transportation equipment. Other businesses are a mix of administrative, real estate, education, finance, transportation and warehousing, wholesales trade and professional services. The total number of establishments with employees was 139.

**Figure 4 West Side Business Counts, December 2021**



Source: Statistics Canada (2021)

The main advantages of the West Side are highway and airport proximity, multi-modal facilities, competitive industrial lease rates when compared to Victoria, large lot sizes and diversity of businesses. It is well positioned for two growing industries, logistics and professional technical and professional services due to its strategic transportation connections.

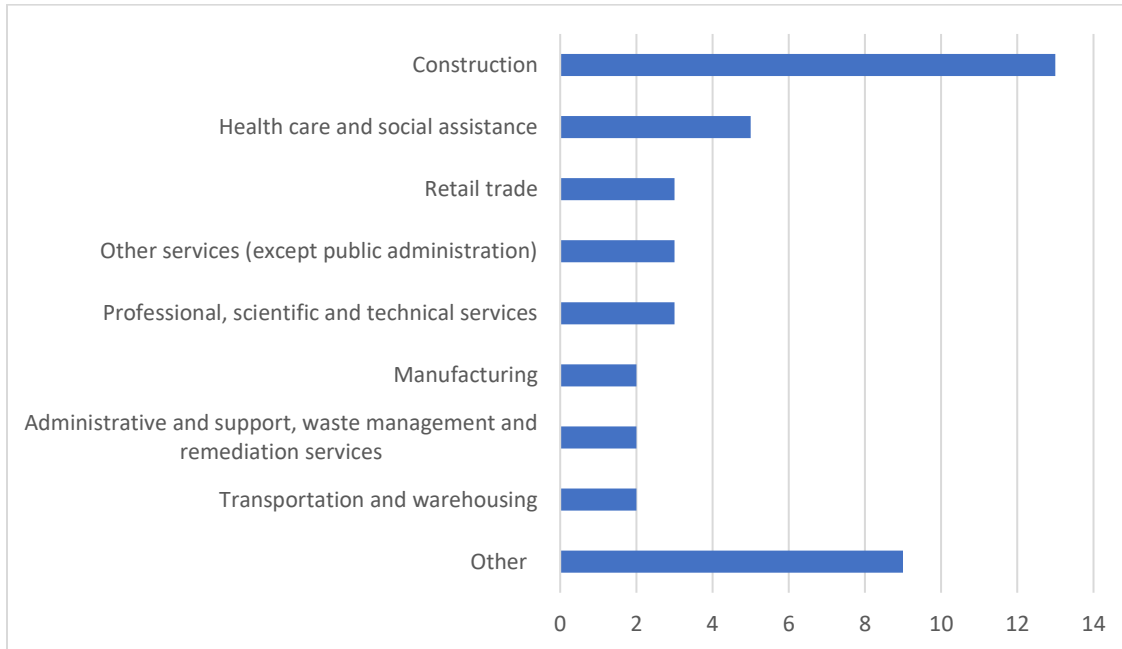
Challenges include the lack of community amenities, and transit and active transportation infrastructure that will attract the local and regional labour force.

**Harbour Road Marine Business Park** is situated along the southern shore of All Bay in Tsehum Harbour. The smallest of the three business districts with 42 establishments with employees in 2021, it is home to several construction companies, complemented by a mix of firms involved in services, trade, manufacturing and professional and technical services (Figure 5). Many of these companies are marine related, including full-service marinas, chandlery, yacht concierge service, boat storage and repair, and

custom boat building. Other businesses that support the cluster include a mix of merchants, transportation and rental businesses, and restaurants and café's.

The main advantages of this area are its water access, marine service cluster and highway access. However, the land inventory is mostly developed and the area is adjacent to residential subdivisions. While there are excellent emerging opportunities in blue and ocean technologies, as well as marine services, that Sidney could tap into, Harbour Road will be challenged to accommodate growth due to its land constraints.

**Figure 5 Harbour Road Business Counts, December 2021**



Source: Statistics Canada (2021)

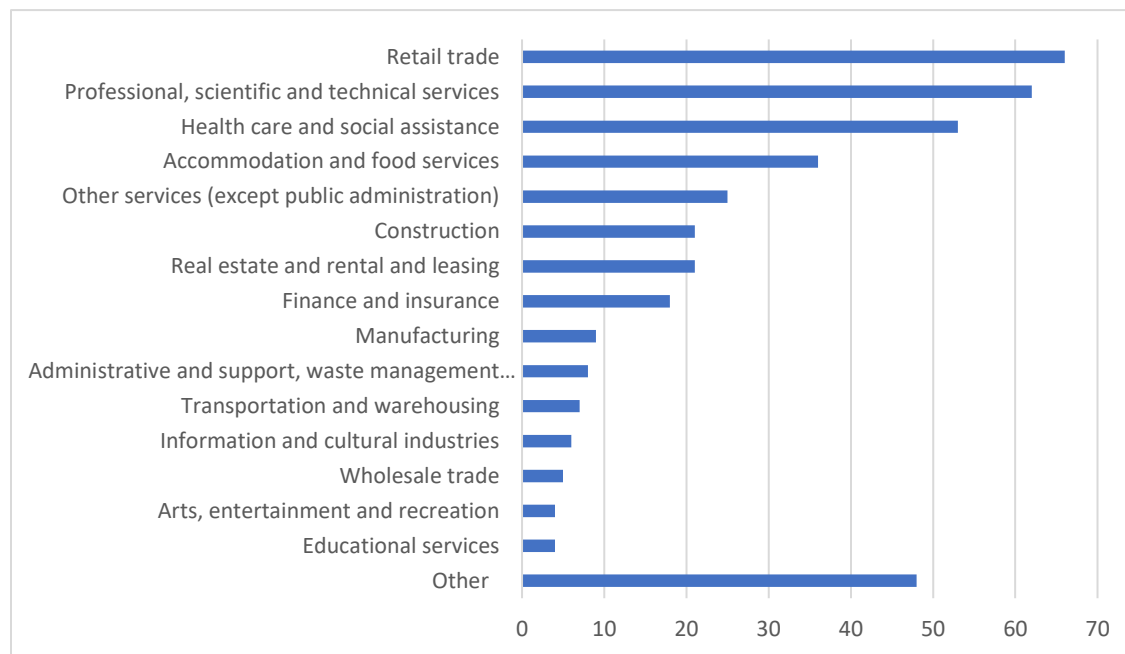
**Downtown** Sidney is the main commercial service centre for north Saanich Peninsula. Defined by its urban context, it has the highest concentration of buildings, people, and jobs of the three districts. With 393 establishments with employees in 2021, business activity is dominated by retail, professional and scientific services, health care, accommodation and food services, and a variety of other personal and business services. (Figure 6). The district serves as the social, economic, and cultural heart of the community.

As the main shopping core of the area, Downtown benefits from its highway access, waterfront access and seaside ambience, vibrant mix of shops, restaurants and services and a strong sense of place that draws in residents and visitors. Downtown is still an affordable place to rent and can accommodate growth sectors such as personal services, healthcare and professional, scientific and technical services. Importantly, it has a strong BIA with a history of action for maintaining a compelling shopping and business destination.

Constraints include an aging building stock and small parcel sizes that make redevelopment at scale a challenge. As with other small downtowns in BC, absentee ownership can often frustrate local district development initiatives, however in Sidney this is mitigated in part by the efforts of the BIA. And like

other downtowns across the developed world, Sidney continues to struggle with the rapidly changing retail landscape and COVID 19 effects.

**Figure 6 Downtown Business Counts, December 2021**



Source: Statistics Canada (2021)

#### 4.6 Economic Development Services

A matrix of government economic development services and programs is shown in Table 21. It provides some context for where the municipality might wish to align and direct its own resources for optimum leveraging and effectiveness.

At the federal level the focus of programs and services is on the areas of trade/export promotion, investment attraction (specifically foreign direct investment), industry/sector development, and funding infrastructure. At the provincial level, the services are broader in scope, ranging from information dissemination and site selection services to trade promotion, investment attraction, promotion, labour market support and indigenous economic development. Regionally, services offered by industry associations focus programs on supporting and promoting specific sectors such as VIATEC for the technology sector and Tourism Victoria for the tourism sector.

The South Island Prosperity Partnership, as the Capital region’s economic development organization, delivers a range of services from information, trade/export promotion, investment attraction to entrepreneur mentoring, promotion and marketing, professional development and indigenous economic development. The Vancouver Island Economic Alliance offers programs across the island in the form of information dissemination and professional development to industry/sector development and promotion and marketing (Island Grown program). Also, professional economic development associations such as Economic Developers Association of Canada, BC Economic Development Association (BCEDA) offer avenues for mainly professional development, and in the case of BCEDA, information dissemination and promotion of their member municipalities.

**Table 21: Economic Development Services Available to Sidney Business**

Level	Organization	INF	SS	INF	TR	IN	IDE	ME	PR	Pro	LM	IED
Federal	Ministry of Science, Innovation & Economic Development				✓	✓	✓					
	Ministry of Infrastructure & Communities			✓								
	Global Affairs Canada				✓	✓						
	Economic Developers Association of Canada									✓		
Provincial	Ministry of Jobs, Economic Development, and Competitiveness	✓	✓		✓	✓	✓		✓			✓
	Ministry of Advanced Education, Skills & Training										✓	
	Ministry of Tourism, Arts & Culture	✓							✓			
	InnovateBC						✓	✓		✓		
	BC Economic Development Association	✓							✓	✓		
Regional	Vancouver Island Economic Alliance	✓					✓		✓	✓		
	VIATEC						✓	✓		✓		
	Tourism Victoria								✓			
	South Island Prosperity Partnership	✓			✓	✓	✓	✓	✓	✓		✓
Local	Town of Sidney	✓	✓	✓								

Note: INF – Information (website, community profile, etc.), SS – site selection services, INF – Infrastructure support, TR – Trade/Export promotion/advice, IN –Investment attraction, ID – Industry/sector development, ME – Entrepreneur Mentoring, PR – Promotion and marketing, Pro – professional development, LM – Labour market and skills training support, IED – Indigenous Economic development

By understanding this broader context of economic development service delivery, Sidney can better establish strategic linkages and potential partnerships. For evaluating the local context and its linkages to the broad array of economic development services and activities, three broad focus areas of Business Development, Business Development and Attraction are outlined below in Table 22. The first area of Business Climate involves those activities that a municipality can do to enhance or improve its assets, infrastructure, services or processes. The second area of Business Development involves those activities aimed at either retaining and expanding local businesses or growing specific businesses or sectors. The third area of Attraction involves activities focused on promotion of a locality to attract tourists or business or attraction of investment, people and infrastructure.

**Table 22: Focus Areas for Economic Development Activities**

Business Climate	Business Development	Attraction
<ul style="list-style-type: none"> <li>• Information</li> <li>• Site selection services</li> <li>• Land</li> <li>• Township centre</li> <li>• Infrastructure</li> <li>• Permitting, regulatory</li> <li>• Incentives</li> <li>• Business and living costs</li> <li>• Utilities</li> <li>• Quality of life</li> <li>• Smart growth</li> </ul>	<ul style="list-style-type: none"> <li>• Business Retention &amp; Expansion</li> <li>• Entrepreneurship</li> <li>• Facilitation services</li> <li>• Sectors and clusters</li> <li>• Export/Trade</li> <li>• Tech-led</li> <li>• Knowledge-led</li> <li>• Access to capital</li> <li>• Venture capital</li> <li>• Access to labour</li> </ul>	<ul style="list-style-type: none"> <li>• Community promotion</li> <li>• Tourism promotion</li> <li>• Investment attraction</li> <li>• People attraction</li> <li>• Skills attraction</li> <li>• Infrastructure attraction</li> </ul>

#### 4.7 Community Viewpoints

As part of the study’s engagement process, two surveys were conducted to solicit feedback on community values, potential economic direction and the state of economic development services. Each is discussed in the following paragraphs.

##### 4.7.1 Community Survey

The community survey drew 272 responses on matters of community and economic development. Respondents were diversified in terms of their age and length of residency in Town of Sidney. The full results can be found in Appendix A. Survey highlights are as follows:

- A variety of reasons have drawn people to Sidney with the most common responses being: Lifestyle and recreation (19%); Work (18%); family (15%); desirable place to live or retire (15%); and housing selection (13%).
- 59% would like to see modest growth to the local economy, while a further 10% would like to see significant growth.
- Some of the greatest community strengths highlighted by residents included:
  - Lots of independent businesses
  - Marine services
  - Weather and landscape
  - Walkable town
  - Business hub for north Saanich peninsula
- Some of the greatest weaknesses highlighted by residents included:
  - General cost of living
  - Parking
  - Tax base
  - Rapid growth and infrastructure not keeping up
  - Lack of housing diversity
- Almost 59% of respondents household purchases spend 50% or more in Sidney.

- When asked what economic development goals were most important respondents choose encouraging affordable housing, improve transportation networks and transit options, and improve household incomes.
- Respondents asked about concerns about job security and impacts from COVID-19 a full 55% said they had no concerns while a further 30% stated they were retired or not part of the labour market.

#### 4.7.2 Business Survey

The business survey was completed by 117 responses on matters of business and economic development. At 94%, respondents were predominately from within the Town of Sidney. The full results can be found in Appendix A. Survey highlights are as follows:

- A total of 42% were either extremely satisfied or very satisfied with the Town as a place to do business, only 5% were not at all satisfied.
- On the issue of Sidney's municipal government business friendliness, a total of 18% said that it was very business friendly, while a further 31% stated it was somewhat business friendly.
- When discussing Sidney with respect to several business factors it was noted that over 85% were satisfied or very satisfied with Sidney's cleanliness while approximately 80% were satisfied or very satisfied with the Town's safety and security and community amenities.
- The highest priority for specific economic development goals were for the attraction and retention of workers where 80% of business respondents ranked it as very important or extremely important. This was followed by improved housing affordability where 80% ranked it very important or extremely important. The top three was rounded out by building a safe and health community where 70% of business respondents ranked it very important or extremely important.
- Looking at sectors with the greatest potential for Sidney, business respondents identified tourism and retirement living services as having the highest potential. Both these sectors scored approximately 90% of respondents seeing high or very high potential.
- When asked about the business priorities that business respondents felt were the most important for the local economy respondents selected retaining existing businesses and helping existing businesses as the highest priority.
- Finally, when asked what has been creating the greatest challenges for businesses in Sidney, respondents identified labour availability and rental rates.

#### 4.8 Strengths, Challenges, Opportunities Analysis

Strengths, Challenges and Opportunities (SCO) analysis is a tool that helps communities identify areas of productive economic activity and wealth creation. SCO is meant to address strategically relevant issues of comparative advantage or disadvantage, which become targets for sustaining or enhancing (in the case of strengths), mitigating and converting (in the case of challenges) or developing and diversifying (in the case of opportunities). An overview of key strengths, challenges and opportunities for Sidney is provided in this section and shown in Table 23.

The Town has many strengths economic and socio-community strengths it can play to. Its quality of life is best characterized by its small-town ambiance and a tight knit community that enjoys a strong sense of place. Sidney's relative compactness enhances its liveability by making many local amenities, including services, recreational facilities and greenspaces, walkable. As a seaside community residents

have access to water-based recreational activities and attractive viewsapes. There is easy access via highway, ferry and air services to 80% of the provincial market. It has a tight-knit group of diversified and future-orientated entrepreneurs and three main economic areas in the West Side, Harbour Road and Downtown districts, which offer strong potential for future growth and development.

**Table 23: Strengths, Challenges, Opportunities Analysis**

Strengths	
<ul style="list-style-type: none"> <li>• Business Hub for North Saanich and S. Gulf Islands</li> <li>• Business diversity and many</li> <li>• Location – easy access to highway17 and urban centres and rural areas and proximity to airport and ferries</li> <li>• Marine Industry and Services</li> <li>• Desirable Place to live or retire</li> <li>• Lifestyle and recreation opportunities</li> <li>• Lots of independent businesses</li> <li>• Business community is a tight-knit group of future-oriented entrepreneurs</li> <li>• Small- town vibe and Seaside charm</li> <li>• Walkable compact community</li> <li>• Weather and landscape/view-scape</li> <li>• Business friendly municipal government</li> <li>• Reasonable taxes and low costs</li> <li>• Gateway to Salish Sea – recreational boating mecca</li> <li>• Low unemployment rate</li> </ul>	<ul style="list-style-type: none"> <li>• Number of great parks and trails</li> <li>• Laying foundation building relationship with First Nations</li> <li>• Walkable compact community</li> <li>• Safety and security/low crime rate</li> <li>• Livability – small town ambiance with attractive community amenities</li> <li>• Cleanliness of community</li> <li>• Waterfront and shoreline access and waterfront views</li> <li>• Working waterfront – historically and present-day</li> <li>• Mild Mediterranean climate</li> <li>• Desirable landscape and natural amenities</li> <li>• Walkable retail (Beacon Ave.)</li> <li>• Desirable ‘High Street’ experience of shops, boutiques, bookstores and restaurants)</li> <li>• High quality development</li> <li>• Volunteer capacity</li> </ul>
Challenges	
<ul style="list-style-type: none"> <li>• Labour force availability and retention</li> <li>• Retaining existing business – helping them</li> <li>• High price of land and rental rates</li> <li>• High percentage of retiree taxpayers</li> <li>• Businesses adapting to rapid change</li> <li>• Balancing growth with small town, seaside character</li> <li>• Lack of visual appeal (minimal landscaping, absence of distinctive landmarks/signage, outdated design)</li> <li>• Insufficient pedestrian/multi-modal infrastructure</li> <li>• Friction between Industrial and residential uses</li> <li>• Lack of diverse and affordable housing options</li> </ul>	<ul style="list-style-type: none"> <li>• Need to educate public on planning process and need for flexibility in OCP regarding commercial spaces</li> <li>• Too much focus on Beacon Ave., and not on the other industrial districts</li> <li>• NIMBYism</li> <li>• Fostering a more demographically balanced and culturally diverse community</li> <li>• Lack of medical facilities and practitioners (less than 1/3 of physician per person vs. Greater Victoria)</li> <li>• Majority of workforce commutes from outside Town</li> <li>• Limited transit options for local workforce</li> </ul>
Opportunities	
<ul style="list-style-type: none"> <li>• Encouraging affordable housing choices</li> <li>• Improve housing affordability – expand housing diversity and choices for local workforce</li> <li>• Harbour Road Commercial district enhancements</li> <li>• Westside Industrial district – emerging mixed-use/innovation hub and workforce housing precinct</li> <li>• Marine industry sector retention and expansion</li> <li>• Tourism development (boating/eco-tourism/culture)</li> <li>• Enhancing community character and downtown experience</li> <li>• Attraction and retention of workers</li> <li>• Improve transportation networks and transit options</li> </ul>	<ul style="list-style-type: none"> <li>• Improving alignment between Town and Airport on future development</li> <li>• Developing MOU with WSÁNEĆ Leadership Council</li> <li>• Increase multi- family residential on West Side - focus on affordable workforce housing</li> <li>• Updating DCC by-law</li> <li>• Active transportation infrastructure needed</li> <li>• Strengthen Downtown’s role as a regional retail commercial hub</li> <li>• Improve connections to waterfront</li> <li>• Enhance retirement living services</li> <li>• Improving pedestrian infrastructure</li> <li>• Public realm improvements</li> </ul>



Sidney Economic Development Strategy  
Report 1 of 2: Current Situation Assessment

The challenges for Sidney centre on labour force availability and retention, workforce housing, which is evident in that many local employees commute to Sidney from outside the community (approximately 45%). Other challenges centre around transit and transportation (pedestrian and multi-modal infrastructure) issues and visual appeal, as well as addressing the friction between industrial and residential uses and balancing growth with the small-town character of the Town. Sidney is not immune to NIMBYism by residents, but if a balanced set of community values are to be achieved there is little doubt that industrial, commercial and residential development will have to occur in alignment. Without a strong tax and employment base a bedroom community will emerge, which over time may compromise the area's quality of life.

Sidney's economic development and business opportunities are wide ranging, from retaining and expanding current business and industrial operations and enhancing the viability of its three main commercial and industrial districts to labour force availability and retaining employees, which is connected to housing and transportation choice and diversity.

The Town is about to produce its new OCP. In its draft form there is strong messaging for economic development and the need to align this with other local values and aspirations for a complete community. It is worth emphasizing that economic development is not just about low taxes and access to natural resources. Business investment where flow to communities that establish and work toward a vision of prosperity and wellbeing for all, one in which productive capacity can exist alongside affordable housing, inclusive labour market, and supportive infrastructure that equally serves residents, businesses and visitors. The new OCP will set the stage for Sidney moving forward and provide guidance on its economic pathway.

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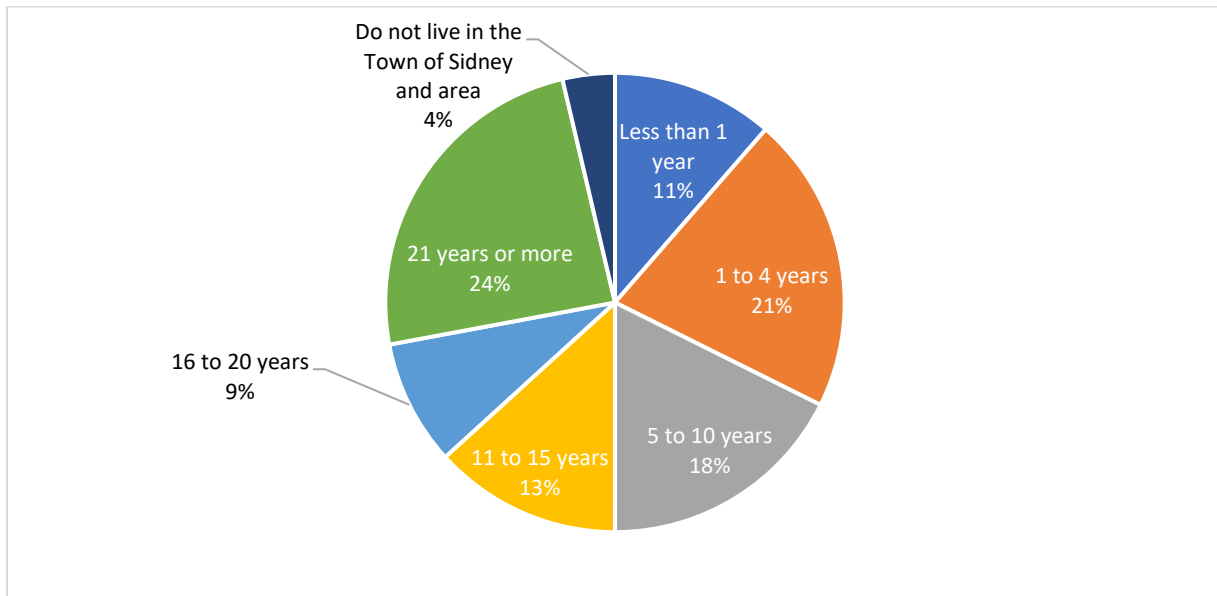
## 6 Appendix A – Survey Results

### 6.1.1 Community Survey

#### 1) How many years have you lived in the Town of Sidney?

A total of 272 responded to this question. Overall, the length of time that respondents have lived in the Town of Sidney varied with 32% saying less than 4 years, while another 31% saying between 5 and 15 years with the remainder begin over 15 years.

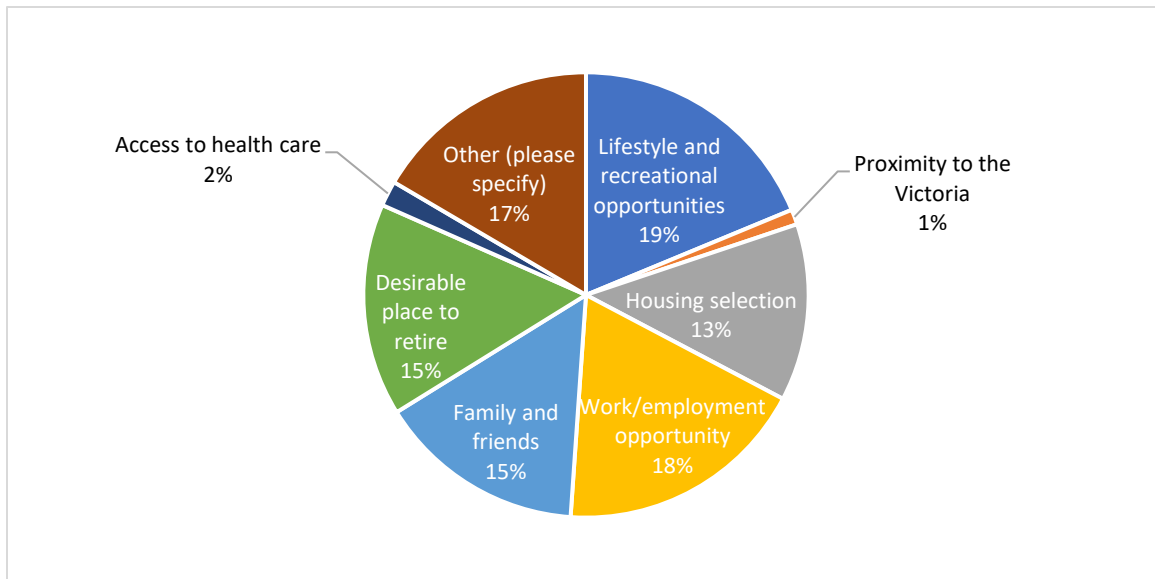
**Figure 7 Length of Time Survey Respondents Have Lived in the Town of Sidney**



**2) Please tell us why you chose to move to the community. Select the response that most greatly influenced your decision.**

A total of 272 responded to this question. Overall, when respondents were asked to select a reason why they moved to the Town of Sidney response were diverse with 18% saying for work, 15% because of family and friends, 15% because it was a desirable place to retire, and 19% because of the lifestyle and recreational opportunities.

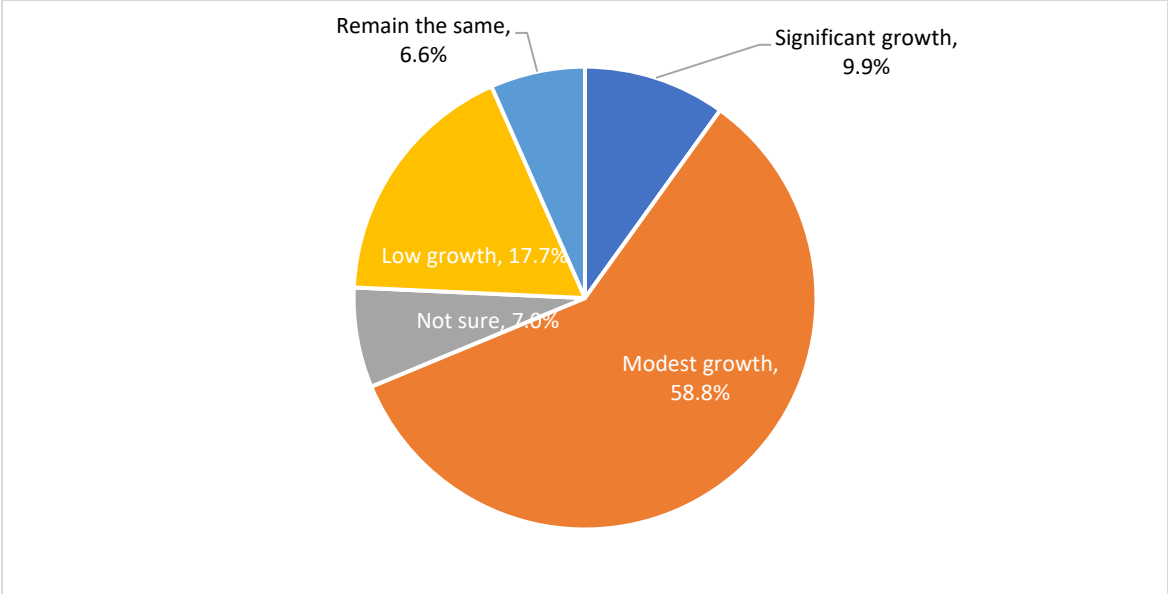
**Figure 8 Survey Respondents Reason for Moving to Town of Sidney**



**3) How would you like to see the local economy change in the future?**

A total of 272 responded to this question. Overall, when respondents were asked how they would like to see the local economy change, the majority, almost 59% said modest growth.

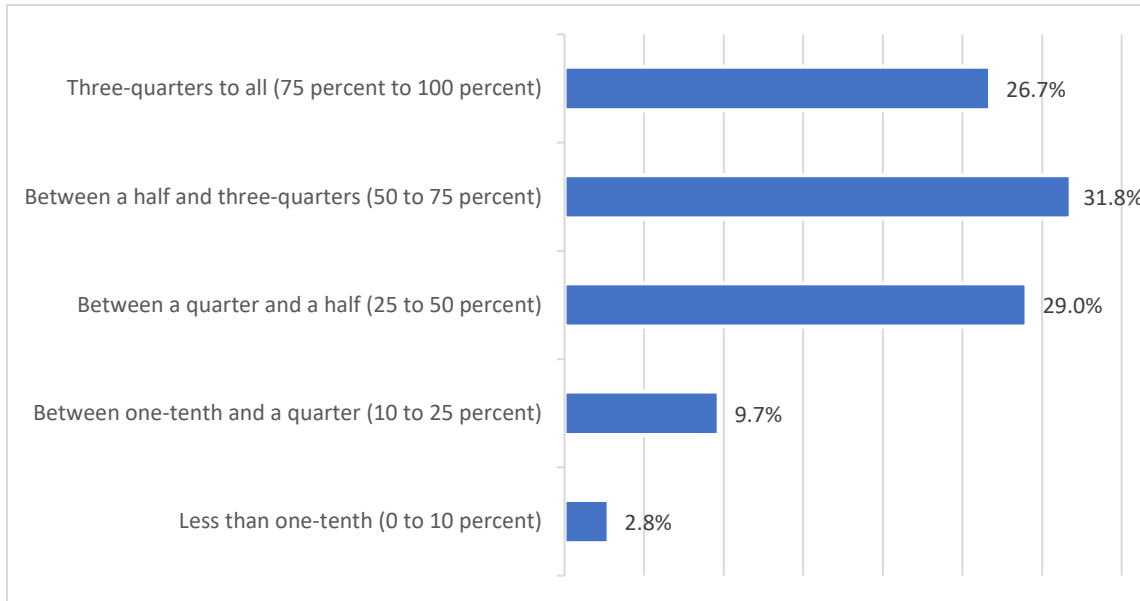
**Figure 9 Survey Respondents Desired Change to the Local Economy**



**4) What portion of your household purchases are made within the Town of Sidney?**

A total of 217 responded to this question. Overall, when asked what portion of household purchase were made locally, almost 32% said between 50 and 75% and a further 27% said between 75 and 100%.

**Figure 10 Survey Respondents Portion of Household Purchases in the Town of Sidney**



**5)**



**6) What are the greatest economic strengths of the community? (Please list your top three)**

At total of 182 people answered the question about community strengths with responses in the table below.

**Table 24 Survey Responses Highlighting the Greatest Strengths of the Community**

lots of independent businesses	wide variety of businesses	draws visitors
Grocery stores	Marine services	Personal services e.g., hairdressers
Residents able to support local business	Tourism-airport, hotels	Marine activity
variety of goods available locally	quality of local goods is good	easy access to highway
Proximate location - transportation, urban centre, metropolitan and rural access	Mediterranean climate - year-round comfortable living	volunteer capacity
Proximity to airport and ferries	Local and innovation	Hub for southern gulf islands and San Juan islands
Beauty of location desirable	Reasonable taxes that maintain the community sufficiently	Weather and landscape
Tourism	Has a good mix of health providers (Dentist; Optometrist; Drug Store;	Walkable town
Proximity to the airport, two ferry terminals, marinas	Business hub for north Saanich peninsula	Diversity of products & services

**7) What are the greatest economic weaknesses of the community? (Please list your top three)**

At total of 184 people answered the question about community weaknesses with responses in the table below.

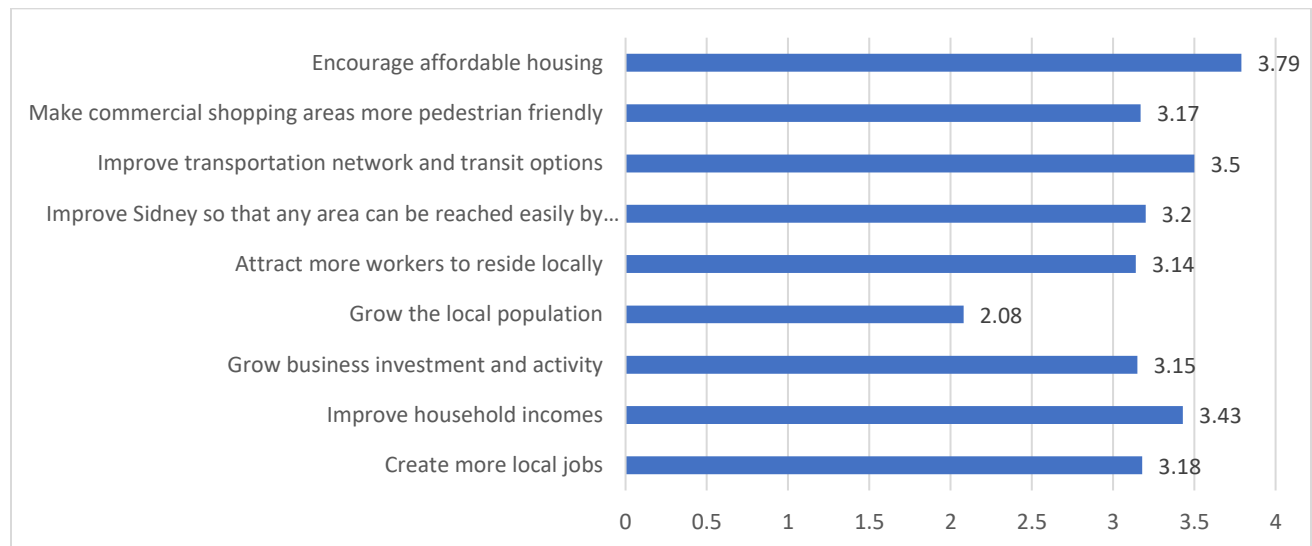
**Table 25 Survey Responses Highlighting the Greatest Weaknesses of the Community**

rapid growth and infrastructure that is not keeping up	if it gets too big the visitor draw of a small seaside community lessens	lack of doctors
Sidney cannot be all things to all people	Urban transportation supply - access and scheduling of service to town and industrial areas	Lack of space for large scale expansion. Amazon is enough
Lack of medical practitioners	Serviced and zoned lands for industrial businesses	cost of housing
Governance of province other muni districts	Housing other than condominiums.	Lack of daylight due to high buildings, i.e., condos in downtown areas
Workforce housing - availability, affordability, rental options	More waterfront sitting areas	Lack of parking makes it inconvenient to spend time in the area
Can be expensive due to a lot of boutique style business		Pat Bay Highway congestion
Not enough selection of age-appropriate stores	Tax base	General cost of living - services, supply, basic living costs
Destroying the appearance of the main street (tourists visit and photograph the old character buildings, not the new harsh lined new buildings)	Parking	Too great a NIMBY attitude & reluctance to change among residents of Sidney

**8) Please rank the importance of the following economic development goals for the community.**

At total of 216 people answered the question about economic development goals, with strong support being highlighted for encouraging affordable housing which scored 3.79. Conversely, scoring the lowest was to grow local population further.

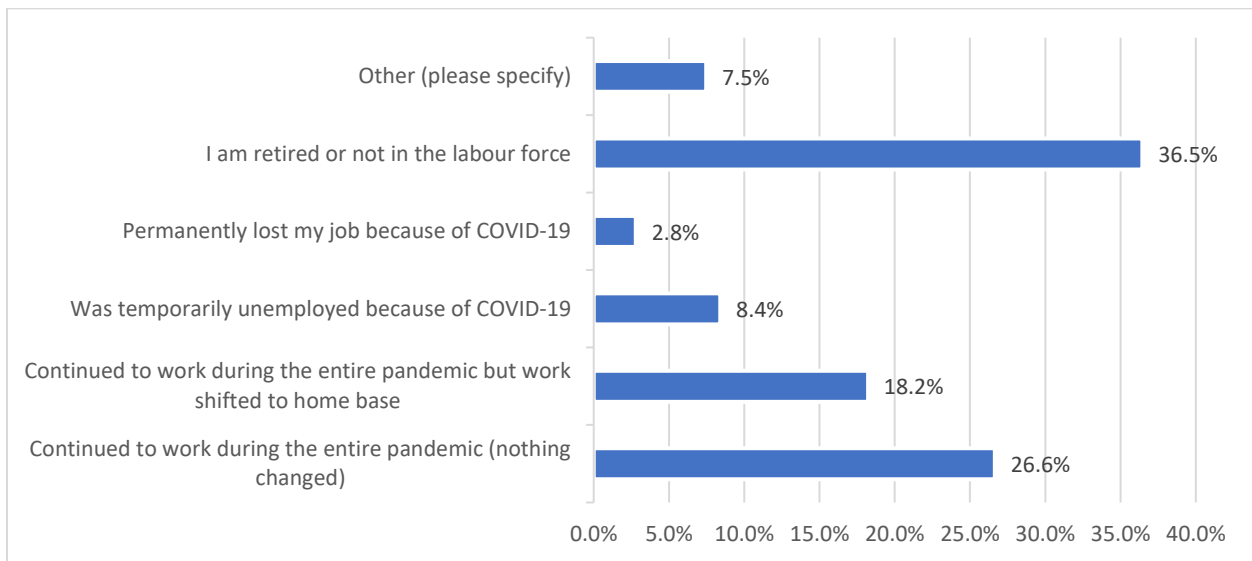
**Figure 11 Survey Responses Weighted Average of Economic Development Goals**



**9) How has COVID-19 impacted your employment status (please check the response that best reflects your experience)?**

When asked about COVID-19 employment impacts, the largest group at just over 36% said they were not in the labour force, while 27% continued to work with no change. However, almost 3% of respondents stated they lost their job permanently.

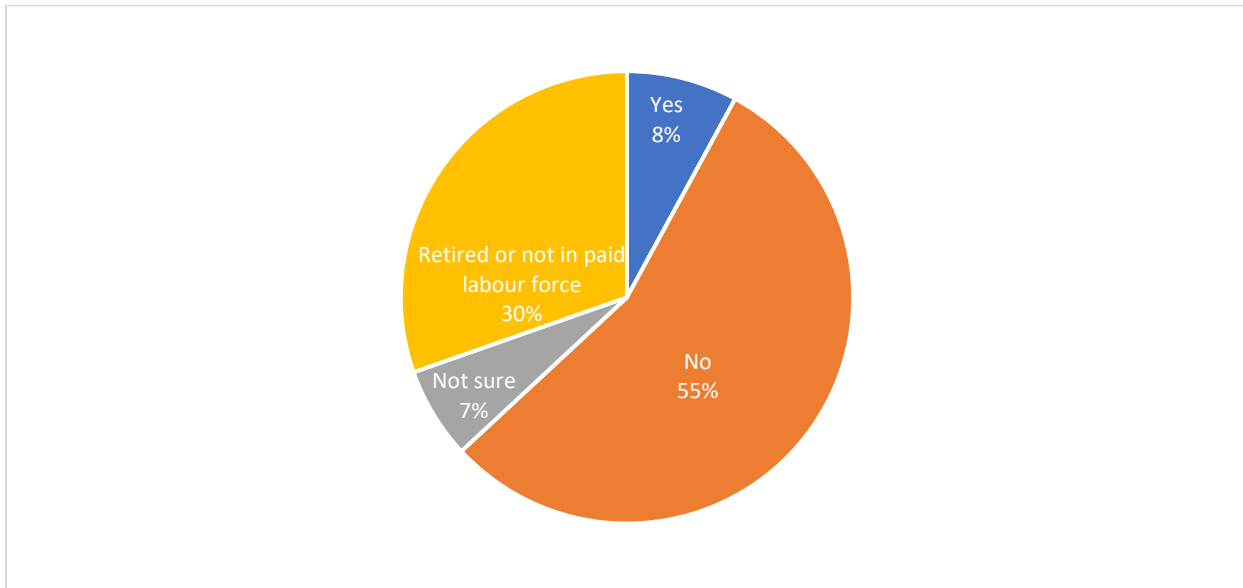
**Figure 12 Survey Respondents Answers to How COVID-19 Impacted Their Employment Status**



**10) Do you have concerns moving forward regarding job security or potential job opportunities due to COVID-19?**

A total of 214 people answered this question. Based on 100%, the largest group at just over 55% said no they had no concerns. A further 30% stated they were not in the labour force so was not an issue and only 8% said yes, they had concerns.

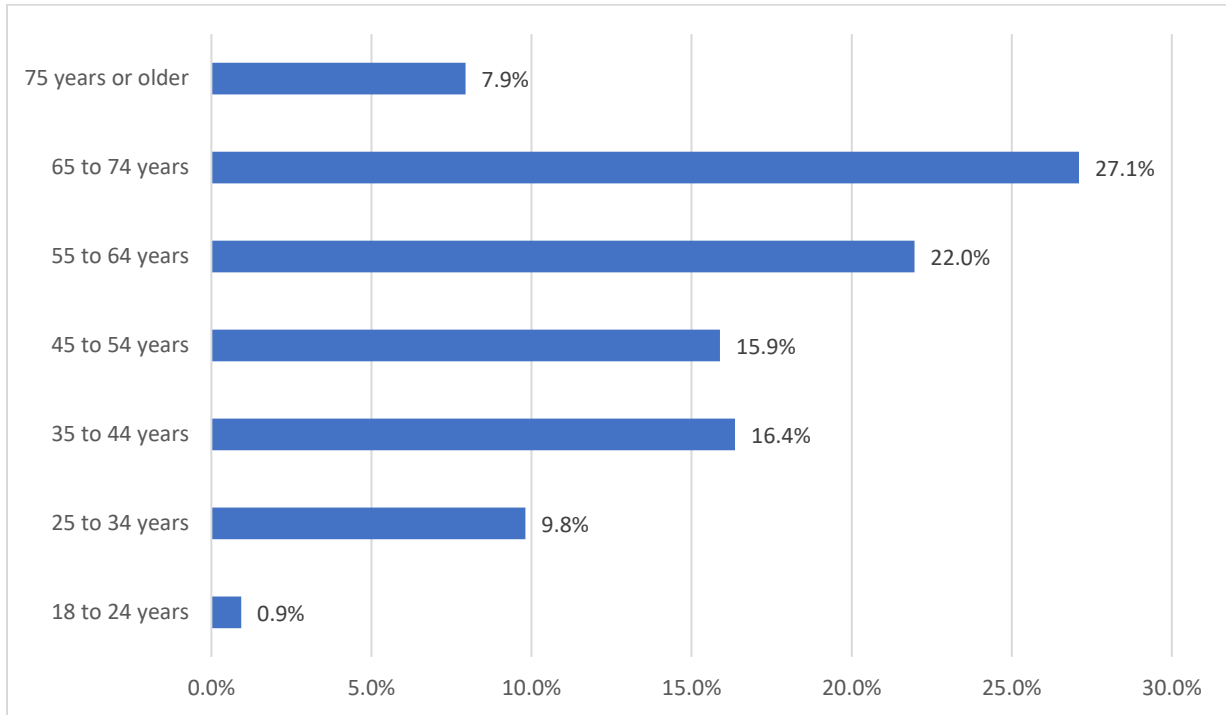
**Figure 13 Survey Responses Concerning Job Security Due to COVID-19**



### 11) What is your age?

A total of 214 people answered this question. Based on 100%, a total of 27% of the respondents were between the ages of 65 and 74 years, followed by the 55 to 64-year age group at 22%. Only 1% of the respondents or 17 responses came from the 18 to 24-year age group.

**Figure 14 Age of Survey Respondents**

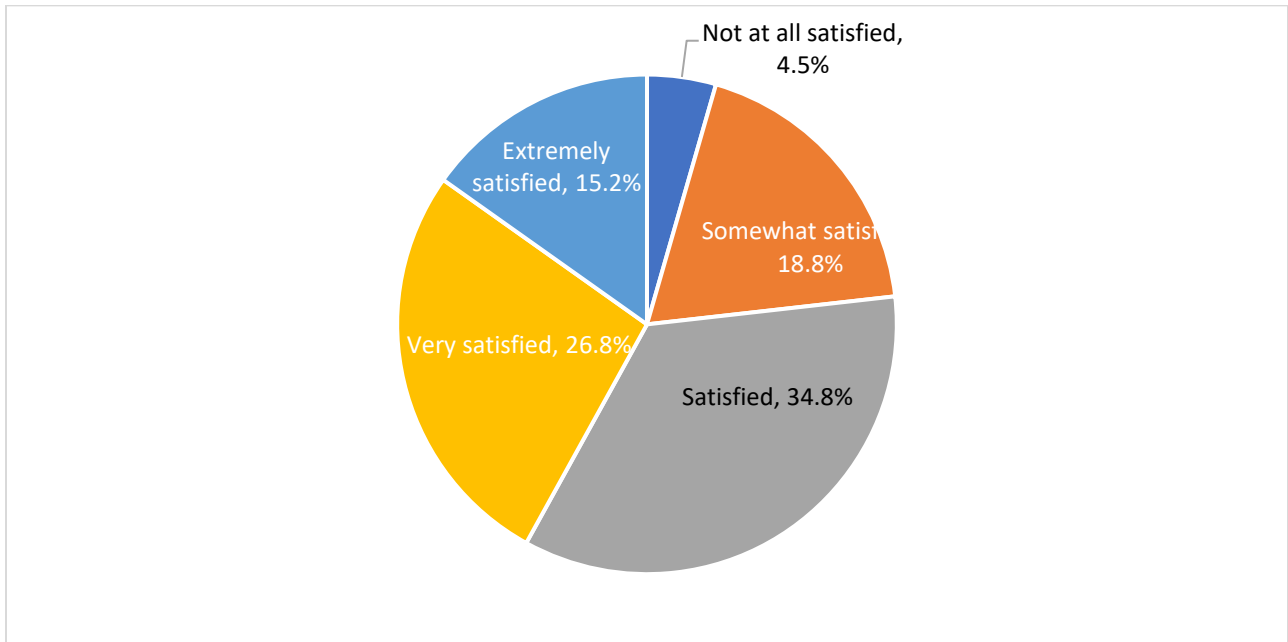


### 6.1.2 Business Survey

#### 1) How satisfied are you with the Town of Sidney as your place of business?

A total of 112 business owners/operators answered this question. Based on 100%, almost 35% of respondents are satisfied with Town of Sidney as a place for their business while a further 27% where very satisfied. Less than 5% were not at all satisfied.

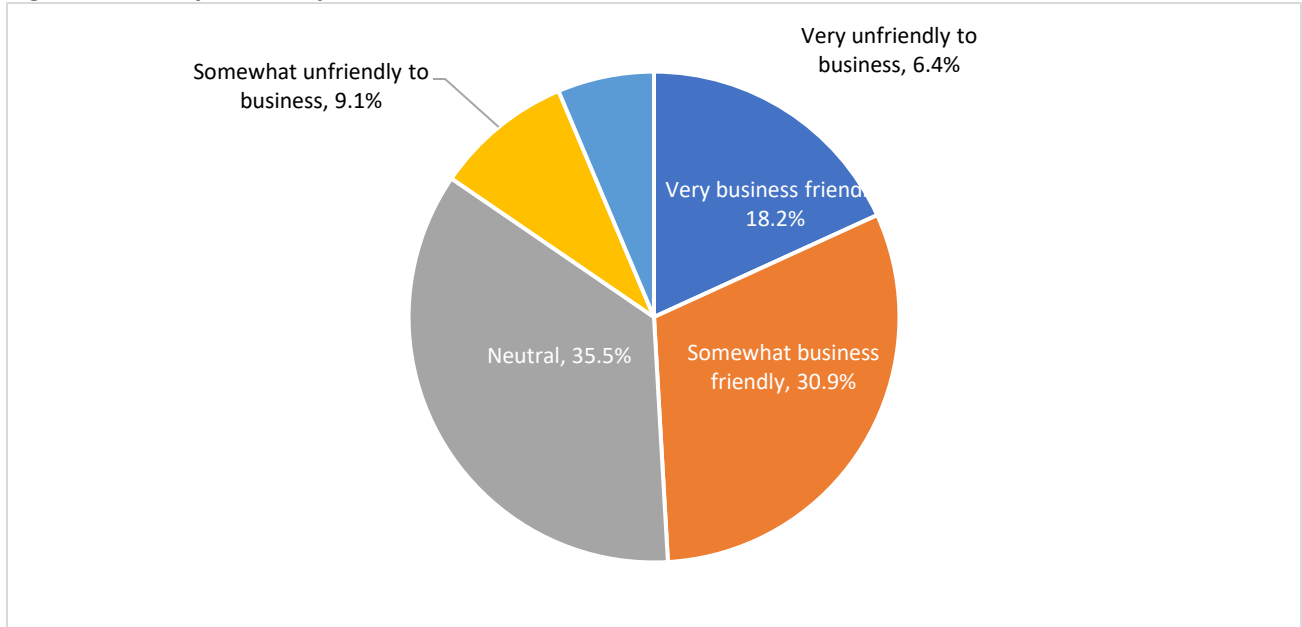
**Figure 15 Satisfaction of the Town of Sidney as a Place to Do Business**



**2) How business friendly do you find the Town's municipal government?**

A total of 110 business owners/operators answered this question. Based on 100%, almost 36% of respondents are neutral with the business friendliness of the Town of Sidney while 18% said the Town was very business friendly.

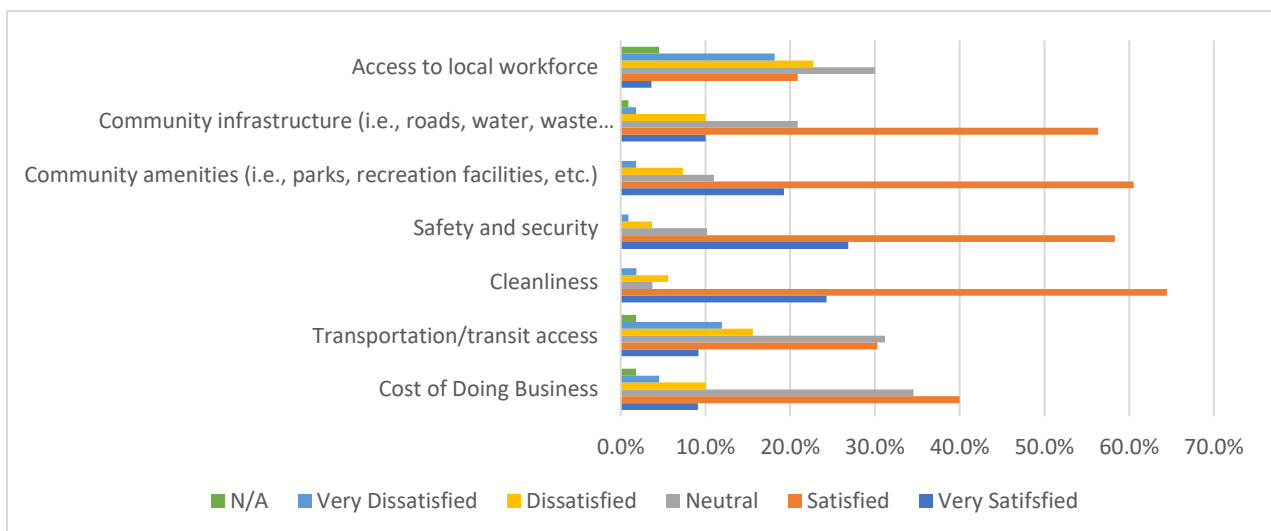
**Figure 16 Sidney's Municipal Government Business Friendliness**



**3) How satisfied are you with Sidney as a business location with respect to the following factors?**

A total of 104 business owners/operators answered this question. Based on 100% for each category most businesses respondent that the Town of Sidney is satisfied. With over 85% satisfied with Sidney's cleanliness. The Town also scored well with regards to safety and security where over 80% were very satisfied or satisfied. Conversely, on access to local workforce only 25% are very satisfied or satisfied.

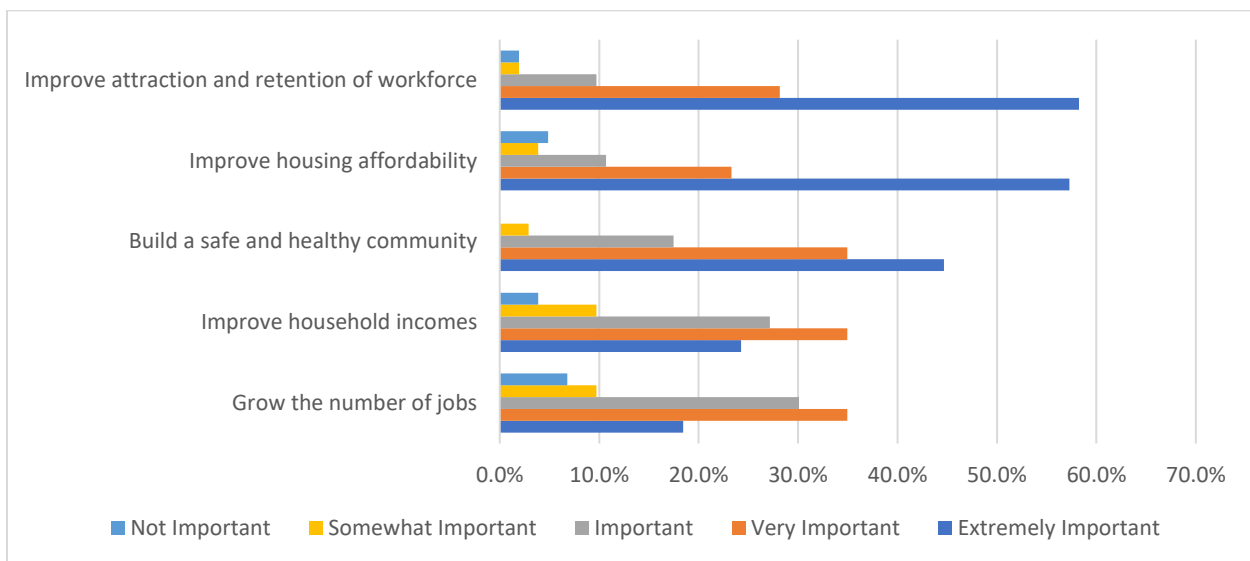
**Figure 17 Satisfaction with Sidney As a Business Location With Respect to Specific Factors**



**4) Please rate the importance to the local economy of the following economic development goals**

A total of 104 business owners/operators answered this question. Based on 100% for each of the economic development goals, respondents that almost 90% saw improve attraction and retention of workforce as extremely important or very important.

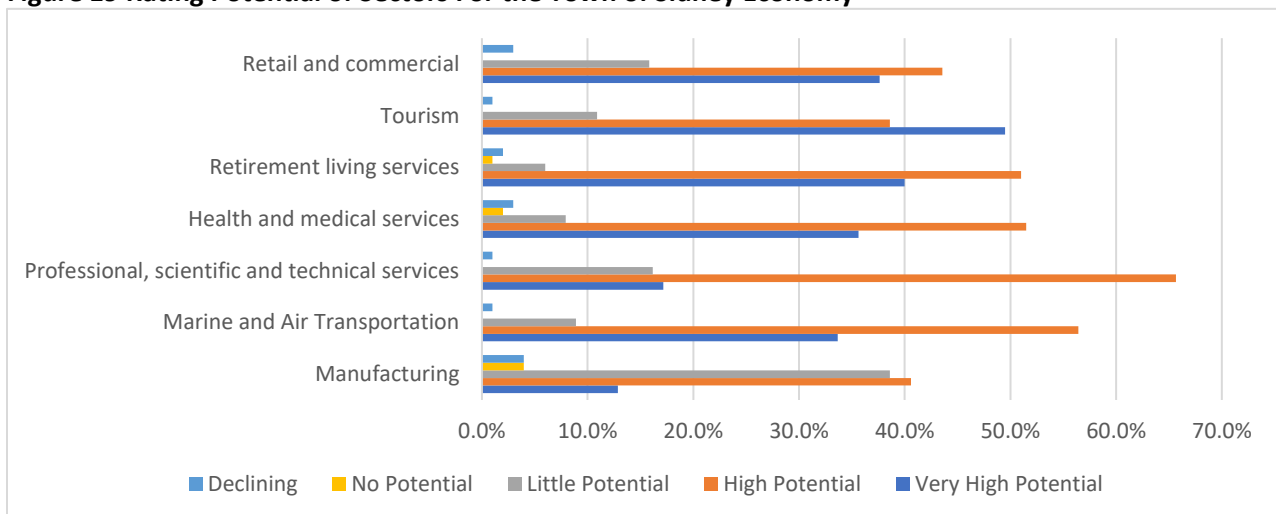
**Figure 18 Importance of Specific Economic Development Goals**



**5) Please rate the potential for Sidney of the following sectors**

A total of 102 business owners/operators answered this question. Based on 100% for each sector, approximately 90% of respondents selected retirement living services as very high potential or high potential. This was followed by 80% of respondents selecting health and medical services as very high potential or high potential. The top four was rounded out by marine and air transportation and professional, scientific and technical services at about 75% for very high potential and high potential.

**Figure 19 Rating Potential of Sectors For the Town of Sidney Economy**

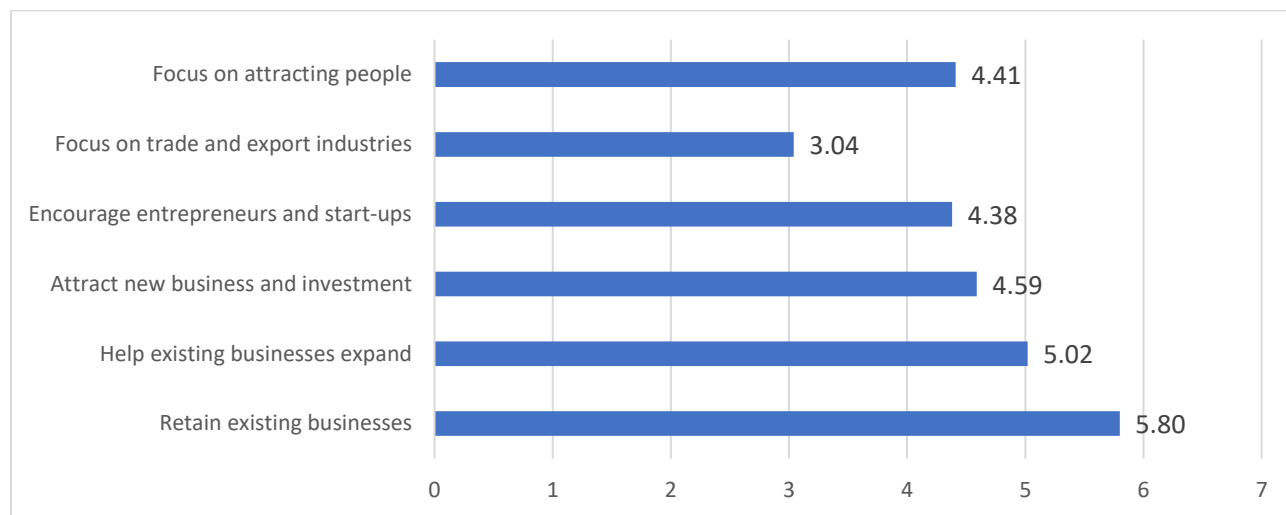




**6) Which business development priorities do you feel are important for the local economy?  
 (Rank from one to six (use each number only once) with one (1) being the most important)**

A total of 108 business owners/operators answered this question. The highest rating went to retaining existing businesses at 5.80, while at the opposite end of the scale was trade and export industries which only received a 3.04 score.

**Figure 20 Business Priority Ranking for Local Economy**



**7) Please name three positive factors that help keep your business in Sidney.**

At total of 73 responses were received for questions about positive factors that help Sidney businesses operate and remain in the community.

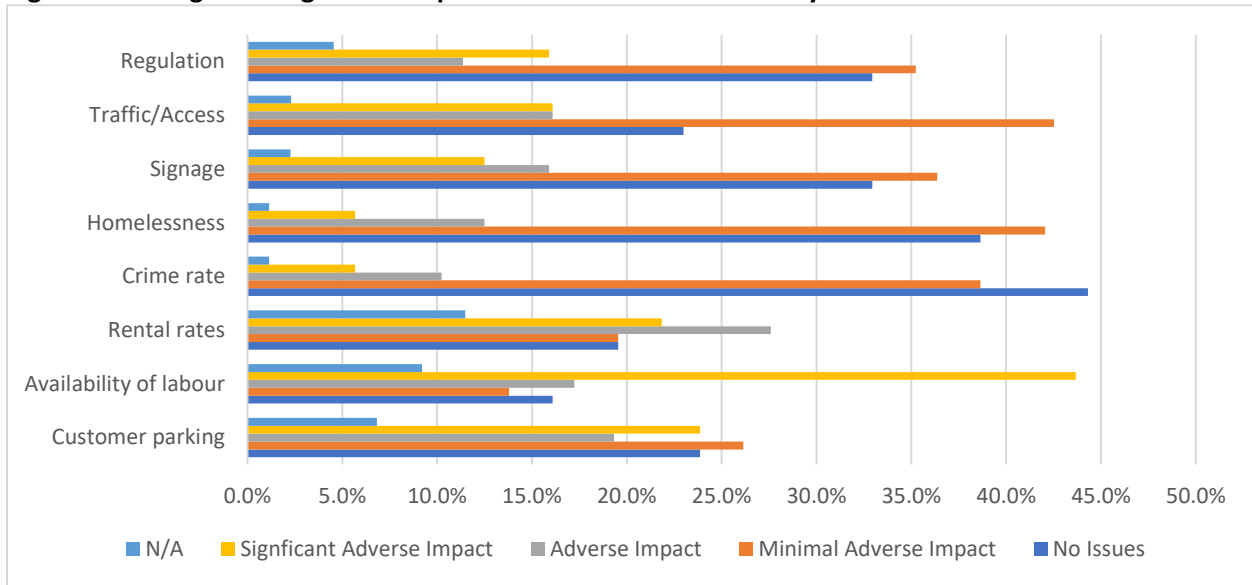
**Table 26 Survey Responses to Positive Business Factors that Help Keep Businesses in Sidney**

The established Marine Industrial Zone	Convenient access to recreational boating	The significant number of Marine Businesses
Services, hydro, high speed internet, roads, infrastructure	People	Business diversity
Proximity to the water	Proximity to Air/Ferry Travel	Banking
Homelessness kept to a minimum	distance from Victoria	Welcoming community
low crime rate	Facilities - unlikely we could find another location.	Lower taxes and costs
People/clients	Its beautiful, with access to many natural amenities	Community desire to support small local business
Established Clientele local B2B	Retail remains stable	Reasonable vehicle parking access
My family grew-up here (re-locating is hard/expensive)	Retired people with lots of money moving here.	Tourism - great place to visit
Quiet lifestyle	A healthy economy	People & reputation
Support in learning initiatives	Heritage	BC Ferry traffic

**8) Please identify how the following challenges impact your place of business?**

A total of 88 business owners/operators answered this question. When asked how the following challenges impact their place of business response varied by category. Availability of labour at 60% experiencing adverse or significant adverse impacts was the most concerning category identified by business. This was followed by rental rates where about 45% of respondents indicating significant adverse or adverse impact.

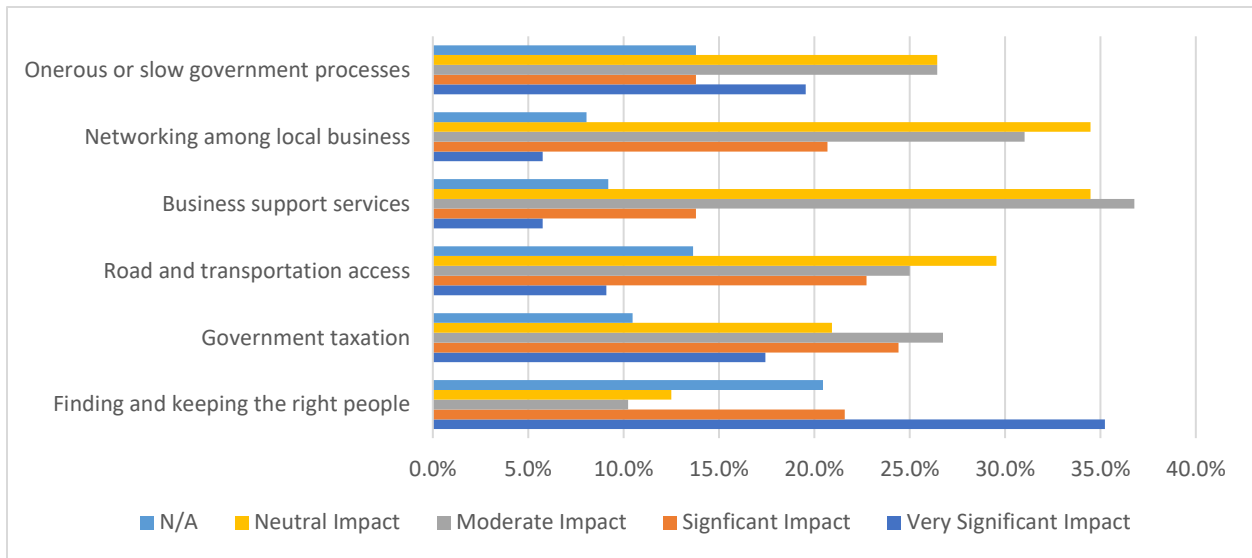
**Figure 21 Rating Challenges that Impact Place of Business in Sidney**



**9) Please indicate how the following challenges impact the operation and growth of your business.**

At total of 88 responses were received for questions about how the following challenges impact the operation and growth of business in Sidney. Here we find that finding and keeping the right people was significant or very significant among 55% of respondents. Government taxation was second with about 45% identifying this to be significant or very significant.

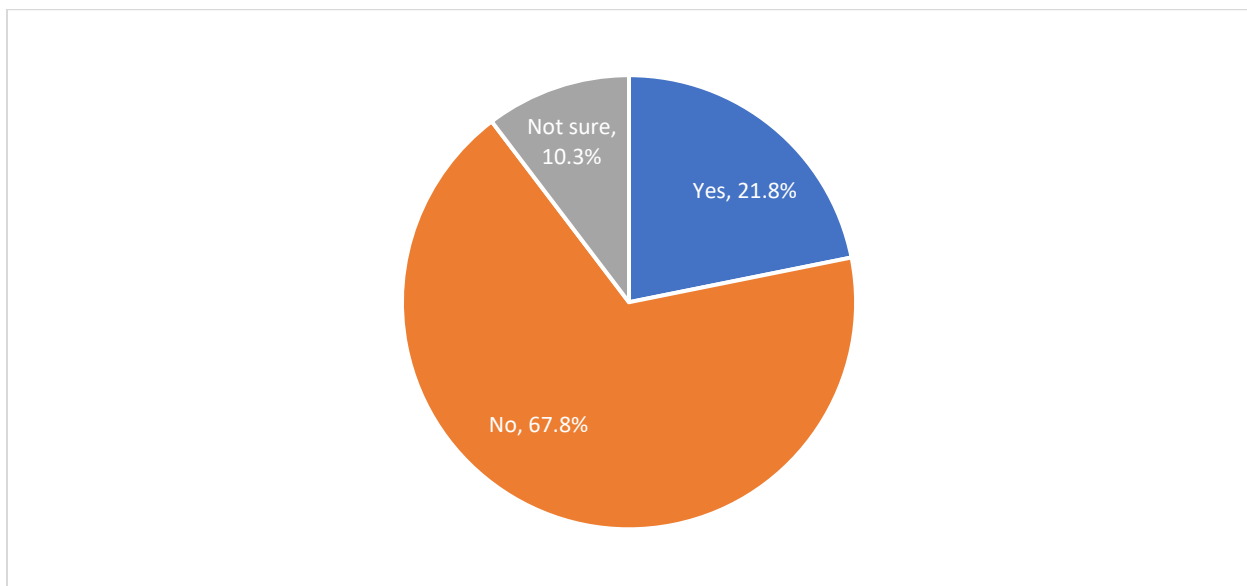
**Figure 22 Business Challenges to the Operation and Growth in Sidney**



**10) Are your company's employees generally able to find housing in Sidney?**

A total of 87 business owners/operators answered this question. Predominately employees of business respondents are not able to find housing in Sidney.

**Figure 23 Sidney Business's Employees Able to Find Housing in Sidney**



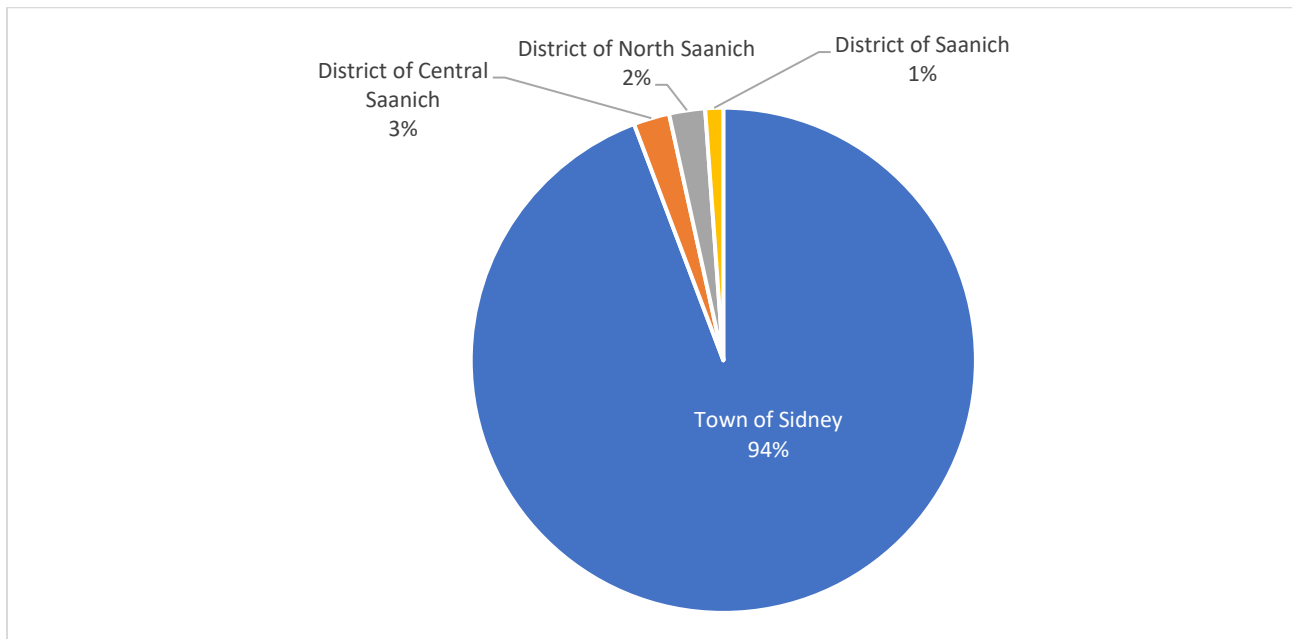
**11) Approximately what percentage of your workforce reside in the Town?**

A total of 80 business owners/operators answered this question. Not surprisingly, based on question 9, on average, only 33.8% of the total labour force of the Sidney businesses resided within the Town of Sidney. This means over two-thirds of the total labour force was from outside the community.

**12) Please indicate in which community your business is located.**

A total of 87 business owners/operators answered this question. Overwhelming the respondents were from the Town of Sidney.

**Figure 24 Location of the Businesses That Responded to the Survey**



**13) Please provide us with any additional feedback you may have.**

- Beacon needs more business development....less warehousing i.e., Amazon
- Town has slow process for building approvals, restricted # of units per lot limits housing, and restricted height limitations limits housing.
- A transportation company that is active throughout lower Vancouver Island.
- We provide a broad range of community services to the entire CRD and heavily concentrated on the Peninsula. A lot of our employees/volunteers do not live in the area. Housing and particularly access to affordable housing for all groups of people would be beneficial.
- Unfortunately, Sidney's planning and development has been ad hock at best. Perhaps my eyes are too old but due to the time I have been in business in Sidney and the changes I have witnessed in our main street town and now the surrounding residential area I believe Sidney has been allowed to pass its best before date. Major considerations will have to be made to attract tourists, residents especially and customers from neighboring municipalities which should make up the bulk of our year-round business. The tourist factor should be that added bonus that Sidney should enjoy after being a destination to our local peninsular residents.

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- We are a home-based business with home office and mobile services. The Town of Sidney have been a valuable partner for our endeavors for many years. However, from a store-front point of view, the residential apartment buildings that have been and are being built have severely impacted parking availability for customer access to the stores. We feel this has a negative impact on the desire to shop in Sidney. Building homes with no equivalent parking spaces available is not wise and has resulted in so much frustration.
- I feel something must be done IMMEDIATELY before it is too late to address the lack of design guidelines for all the new buildings. If we want to attract visitors and maintain a pleasant seaside town atmosphere, allowing big square boxes as buildings and allowing them to go to 5 and 6 stories is quickly ruining the feel and character of the town. If Beacon avenue is allowed to go this route then why would a tourist come here? We have the opportunity to build a seaside community that attracts visitors, but if we don't have a design vision, developers will decide for us.
- It has taken me 14 years to find housing in Sidney. I was driving from Westshore (Sooke) for 13 years. 6 days a week. I finally found a small apartment in September 2021. I'm finally back home.
- I used to enjoy living and working in Sidney. Not sure but considering moving to a less congested community.
- The Town needs to focus on people. If Sidney is welcoming for people, then they will come. Right now, it is very car focused. Wider sidewalks, biking infrastructure, green spaces would make Sidney more welcoming.
- The complete lack of a design aesthetic for new construction will have multi-decade adverse impacts on business. Lower floor business with upper floor residences is great, but the community aesthetic along Beacon and surrounding streets is horrid. Sidney could learn a lot from Langford (crazy but true)
- Current housing for workers is now under extreme threat due to the ridiculous real estate values and low interest rates. Many of our workers are now scrambling to find alternate accommodation as they are being evicted to make way for house sales (largely to people moving into the prov)...this has got to stop!
- Very happy that our Sidney store has been a big help in retaining our sales volume with the closure of our downtown store don't ever let Sidney get like Victoria.
- I am concerned about the buildup in Sidney, that is removing green spaces. I would like to see green roofs put in for business and leisure purposes, with walkways connecting roofs, effectively moving some pedestrian traffic off of the streets. Done correctly, with seating, and a park like atmosphere, we would see an influx of tourism, and continue to have the walkable charm that is Sidney. Coffee shop seating on the street or sidewalk is nice, but what if it was seating in a park, on the roof, with a view?
- Need more large retail spaces.
- I am a new retail business in Sidney, and I have been very impressed by with the BIA. Bravo - Great job, team!
- Keep the main street of Sidney, Beacon for retail and public and not businesses like Glass companies, insurance brokers, etc. not the right place if we want to have customers for the area.
- All of our staff have to commute as the rents are far too expensive

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- The complete destruction on the marine environment/shoreline by a lack of enforcement of regulations, and overkill of high-rise construction in tsunami zones and along the shorelines, has a very negative impact. Land should be removed from the development pool and made into parkland to deal with sea level rise. Cutting own mature trees must stop. Bigger and more is NOT better.
- Industrial space in Sidney is nearly non-existent and I have friends who have found space in North Saanich and Saanichton as much as they would like to stay local. Retail space is in abundance. Downtown Sidney could be much more vibrant and healthier if it wasn't for the greed of a handful of landlords who would rather see their spaces empty than offering lower rents so that small business could thrive. This is killing Sidney! Council should step in with regulation against inflated rents.
- Council needs to relax long and short-term rental regulations and encourage TRULY AFFORDABLE housing options to attract a labour force. Currently one of my employees comes in from Langford every day and to the other, we offer housing on our property at a below market rate that reduces their daily commute, therefore gas consumption, reduced carbon footprint, affordable hourly rate and they can save with a hope in hell of perhaps one day being able to afford their own property. I would like to offer my Langford employee the same opportunity but council is unable to see the wisdom and relax the bylaws.
- I would like Sidney to be more visually pleasing with city planning prior to building. It would be nice if some building on Beacon is recessed on the upper levels and have restaurants with patio dining on the upper levels. We need an Italian Fine Dining restaurant in Sidney, like Umberto's in Vancouver.
- Hard to find employees. Expensive to live here Parking and traffic a problem.