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# Economic Development Strategy

Employment Lands Analysis

FINAL REPORT

PREPARED FOR:



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## EXECUTIVE SUMMARY

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### Purpose

This Employment Lands Analysis (ELA) report provides a quantitative and qualitative assessment of the history, current conditions, and emerging trends affecting business and employment change in the District of North Vancouver (DNV). In doing so, the report identifies the potential demand for employment growth, including land and space needs. This analysis culminates in an assessment of the District's existing strengths and weaknesses alongside future opportunities and challenges, intended to inform the development of the District's Economic Development Strategy (EDS).

### The District's Most Recent Economic Snapshot

The District of North Vancouver has a rich history of economic and employment activity tied to the land. From the First Nations communities in the time before European settlers arrived, through the community's economic heritage of sawmilling, shipbuilding, and industrial trade, to its modern mix of production and service-based industries, economic activities have shaped and influenced the community identity of the District and broader North Shore region.

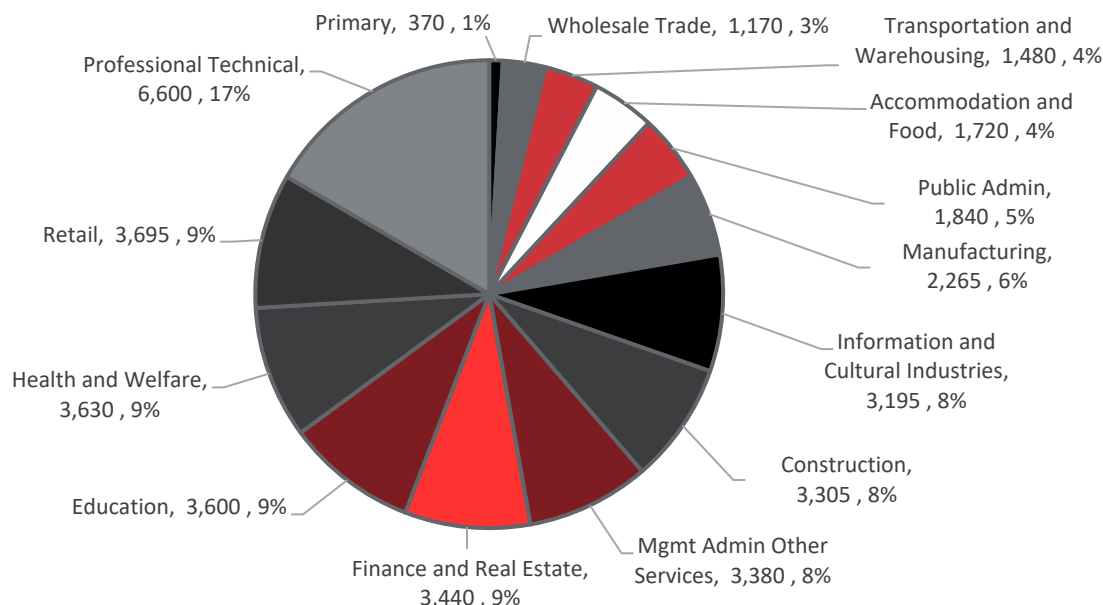
As of the 2021 Canadian Census, the District of North Vancouver served as home to over 88,160 people and accommodated for 39,690 jobs, amounting to a local employment activity rate of 45%. In the context of the broader economic region, the District accounts for 3.3% of Metro Vancouver's population and 2.9% of the region's employment. At a high level, local jobs are predominantly comprised of Commercial activities (54%), followed by Industrial (24%), Institutional (22%), and Primary (<1%)<sup>1</sup>.

It must be noted that these figures represent the most recent Census, which was conducted in May of 2021, a point in time when the COVID-19 pandemic was having considerable impact on employment. Ongoing lockdowns had resulted in significant disruptions to businesses across the region, with some forced to temporarily shut down and furlough workers, while others transitioned to Work From Home arrangements, relocating many jobs that had traditionally been located in the region's Central Business District of downtown Vancouver to suburban communities, including the District of North Vancouver.

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<sup>1</sup> The categories shown here represent 2-digit sector codes as defined by the North American Industry Classification System (NAICS), categorized by common characteristics in employment activity.

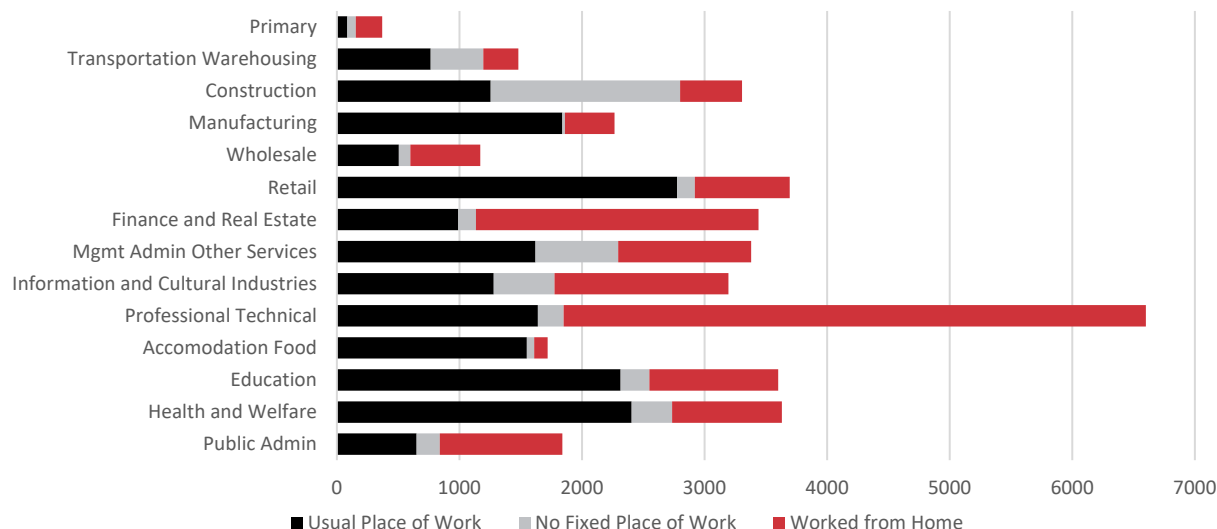
### Employment Profile by Industry Subsector, District of North Vancouver, 2021



Source: Statistics Canada

Of the 39,690 jobs located in DNV in 2021, just under half of the workers reported to a Usual Place of Work (49%) with the rest split between Work From Home (39%) and No Fixed Place of Work (12%). However, these trends varied significantly depending on the nature of the job activity.

### Employment by Industry Subcategory and Place of Work, District of North Vancouver, 2021

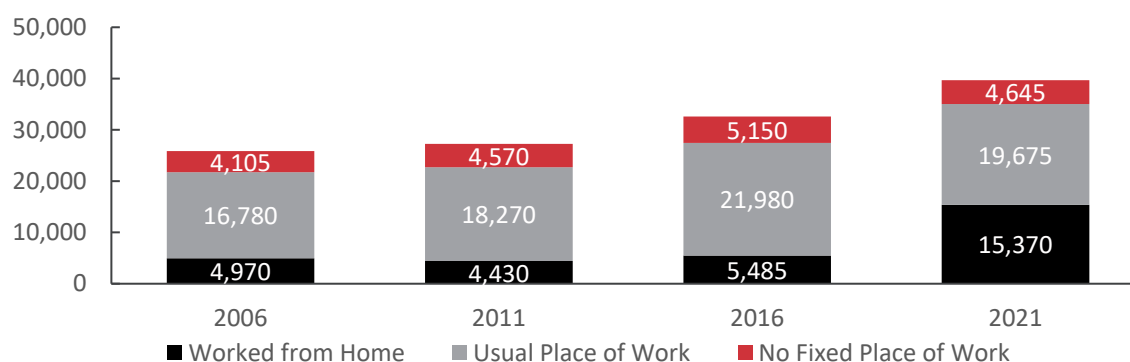


Source: Statistics Canada

## Employment Growth Trends

The District of North Vancouver experienced steady employment between 2006 and 2016, making significant progress towards the Official Community Plan's (OCP) goal in accommodating over 36,000 jobs by 2030. Jobs reporting to a Usual Place of Work had been steadily increasing prior to the pandemic, driving demand for employment space across the District.

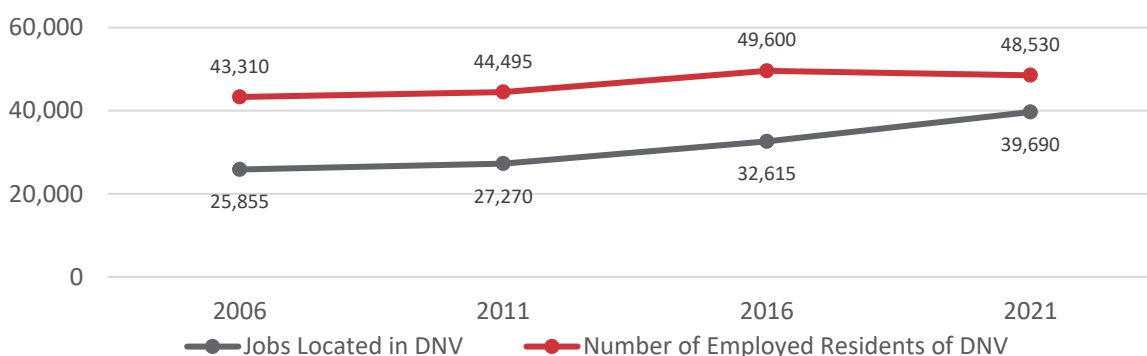
### Employment Profile by Place of Work, District of North Vancouver, 2006-2021



Source: Statistics Canada

Prior to the pandemic, the number of jobs located in the District had been growing roughly in step with the number of employed residents; though analysis of commuting patterns over this time indicated that roughly two-thirds of employed District of North Vancouver residents that commuted to a Usual Place of Work reported to places of employment in other municipalities, indicating a significant rate of out-commuting. This trend shifted considerably in 2021, as more residents chose or were required to Work From Home. At the same time, the number of residents commuting to a place of work outside of the District declined precipitously.

### Change in Jobs Located in DNV and Number of Employed Residents, 2006-2021

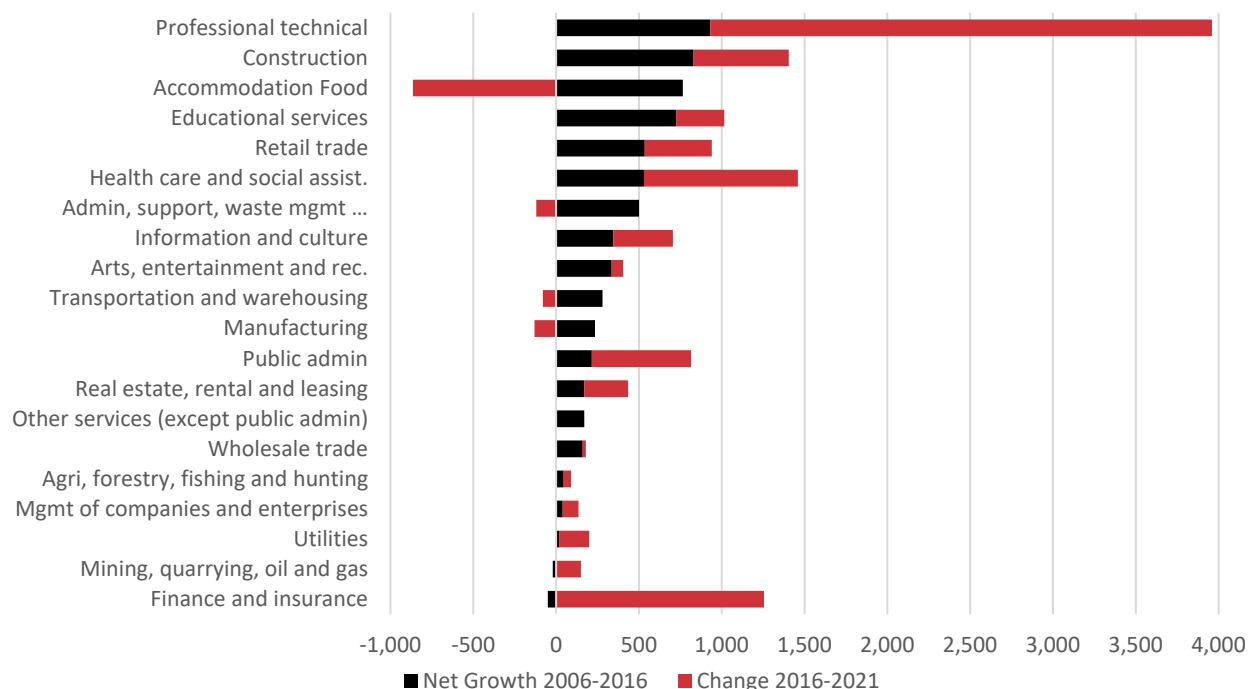


Source: Statistics Canada.

While this phenomenon was not unique to the suburban communities like the District, it was somewhat more pronounced, likely due to the relatively high share of District of North Vancouver residents working in office-based jobs that were more able to make the shift to Work From Home. While it is expected these figures will decrease as more workers are eventually called back to the office over time, the prevalence of hybrid work arrangements will likely have a lingering impact on both Work From Home and locational preferences for certain office-based employers for the foreseeable future.

The impacts of the pandemic varied significantly across different areas of the local economy, as is illustrated when comparing net employment growth between 2006 and 2016 to the change that occurred from 2016 to 2021. Accommodation and Food-related jobs were hit particularly hard by the lockdowns, while negative growth was also observed in other key sectors like Manufacturing and Transportation and Warehousing. Other sectors experienced significant job growth, though much of this was the result of the mid-pandemic shift towards Work From Home. Despite these shocks and variances, a longer-term review of trends in the period leading up to the pandemic suggests reasons to be optimistic, with positive patterns experienced across most sectors, including those most severely impacted by the pandemic.

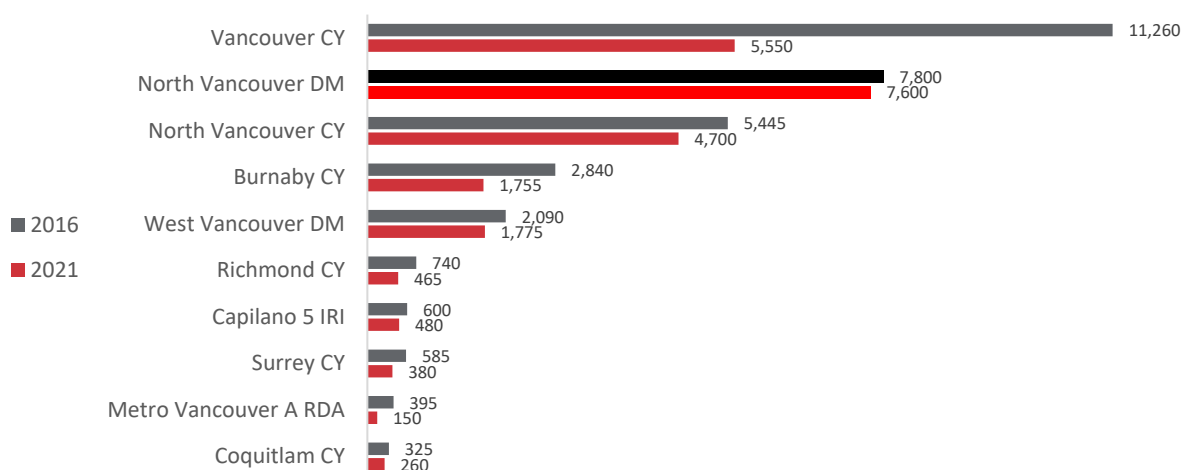
#### Employment Change by Sector, District of North Vancouver, 2006-2016 & 2021



Source: Statistics Canada.

At the same time, changing commuting patterns to and from the District during the pandemic resulted in a significant narrowing of the gap between in- and out-commuting workers. As a suburb of the regional center, the District of North Vancouver has historically experienced a net-outflow of commuters, led primarily by residents that cross the Burrard Inlet to work in the City of Vancouver. Through the pandemic, the number of workers commuting from the District into Vancouver declined by over half, while many other out-commutes also declined as more workers instead worked from home.

### Where the District's Residents Work, by Place of Work, 2016 & 2021



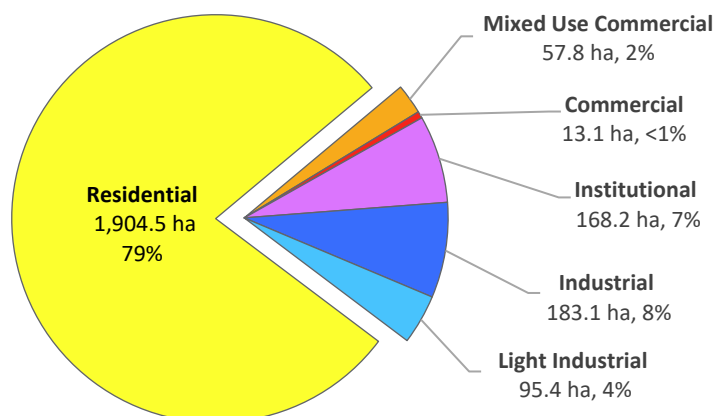
Source: Statistics Canada.

It is notable that, while the District accommodates for 19,675 jobs with a Usual Place of Work, nearly two thirds (61%) of those jobs are not filled by District residents. Compared to the decline in out-commuting, the number of District residents working at a Usual Place of Work within their community remained relatively stable, but a significant number of local jobs are still filled by people that live elsewhere.

## A Constrained Land Supply

Through the Official Community Plan, the District directs and accommodates growth and development through policies that regulate land uses for community and employment lands. The Employment Lands Analysis categorizes employment based on their activities and emerging trends to split jobs into three high-level land use categories that mirror the general employment land use designations identified in the OCP – Industrial, Commercial, and Institutional. An analysis of the District's land supply show that while the total area within the borders of the District totals over 16,000 hectares, only about 2,422 hectares (15%) of that land is considered to be developable. Of the developable land, 21% is currently designated for employment uses and split between Industrial (12%), Institutional (7%), and Commercial (3%).

## Developable Land in the District of North Vancouver by OCP Designation



Source: District of North Vancouver – Note: \*Excludes Parks, Open Space and Natural Areas, Roadways and other Right of Ways.

This is comparatively low when measured against other parts of the region, with other Metro Vancouver municipalities designating an average of 34% of their developable land for employment purposes. This is made more challenging still when looking at the composition of the District's employment land supply, which features very little in the name of vacant or underdeveloped land and the bulk of the built employment space having faced critically low vacancy rates for extended periods of time. This shortage is further exacerbated by the loss of zoned Industrial lands, which decreased by nearly 4.5 ha since 2011.

## Industrial Zoned Land Change in Hectares, District of North Vancouver, 2011 to October 2023

Period	2011 to 2016	2016 to 2021	2021 to Oct 2023	Net Change
Net Change	-3.42 ha	-1.27 ha	0.22 ha	-4.47 ha

Source: District of North Vancouver

Built space on these employment lands is critical to the accommodation of economic activity. A total of just over 17 million square feet of employment space exists in the District today, broken out as follows.

## Estimated Employment Floor Space Supply by Land Use Class

Commercial	Industrial	Institutional
6,608,000 sq ft	6,645,000 sq ft	3,820,000 sq ft

Source: B&A & Urban Systems, based on data from District of North Vancouver

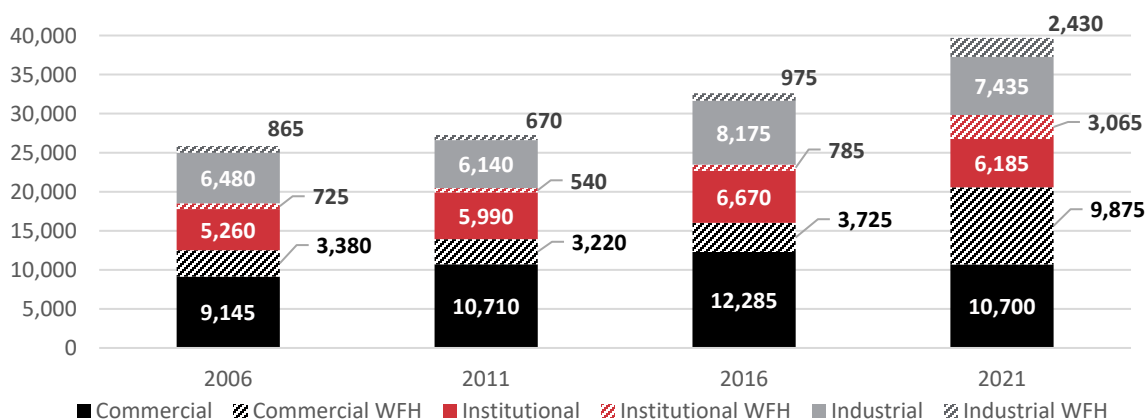


## Emerging Trends and Market Analysis

An analysis of emerging workplace and land use trends was undertaken at a regional and local level with land use related data for each of the major employment categories. Consideration of these trends provide a better understanding of the utilization of space and its subsequent implications for future employment growth and floor space needs. The key findings are summarized as follows:

- The District of North Vancouver was experiencing strong and steady growth in employment growth across Commercial, Industrial, and Institutional land use categories in the years prior to the pandemic. This general trend is expected to return in the years that follow.
- Technological innovation in automation and artificial intelligence is allowing industries to change the way goods are produced, organized, and distributed. Automation and digitization will enable increased efficiencies, reducing the amount of space needed for many employment activities.
- Many people that Worked From Home during the pandemic are starting to return to the workplace, but it is not expected that the rate of Work From Home employment will fully return to pre-pandemic trends. At the same time, the shift towards flexible work arrangements will persist – particularly amongst office-related jobs – resulting in a more dispersed allocation of employment between the regional Central Business District and suburban markets.
- Industrial, Commercial Office, Commercial Retail, and Institutional market data all show strong signs of demand in the post-pandemic period. Vacancy rates in each category are well below regional averages, with rents rising rapidly in turn. The underlying forces behind these trends are anticipated to persist for the foreseeable future, suggesting the demand for additional space and employment opportunities in each land use category are likely to continue.

**Total Employment Location by Land Use & Work From Home, District of North Vancouver, 2006-2021**



Source: Statistics Canada.

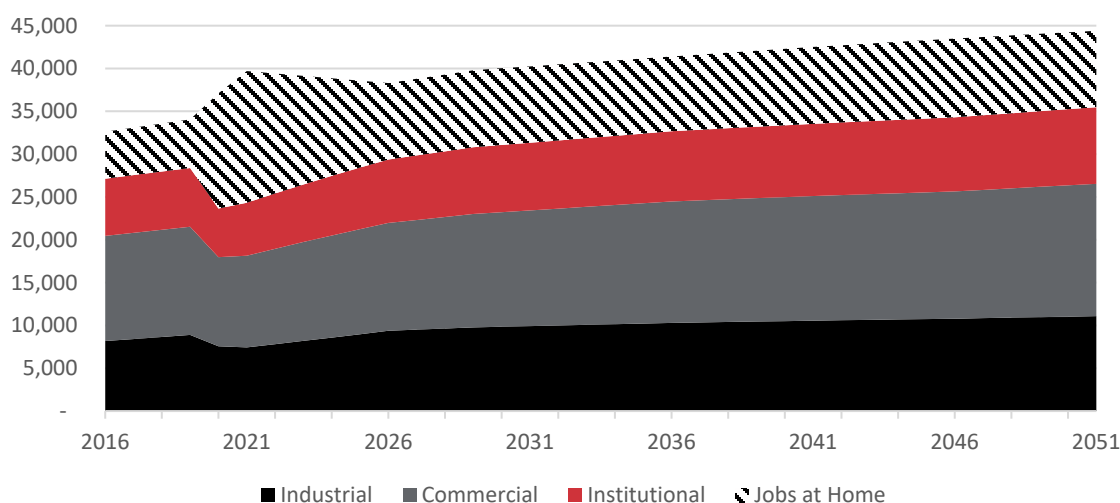
## Growth Outlook and Demand Analysis

Starting with the regional population and employment forecast scenarios prepared by Metro Vancouver as part of the Metro 2050 Regional Growth Strategy, a demand analysis has been prepared to assess where future economic needs and potential gaps in land use development capacity are likely to occur. These projections anticipate the District of North Vancouver will reach a total population of 118,200 by 2051, while the total number of local jobs would increase to 47,900.

As they were published prior to the full release of the 2021 employment figures, the Metro 2050 projections did not fully capture the impacts of the pandemic, as indicated by the discrepancy between the projected 2021 employment count of 37,100 and the Census result of 39,690. To account for the shifts in employment resulting from Work From Home models and to encompass the varied affects of the pandemic on different industry sectors, the projections in this ELA have been adjusted to account for the employment changes as reported in the 2021 Census.

These projections were then further refined and adjusted downwards based on observed trends amongst different economic sectors and land use categories, resulting in a projection of employment broken out by the key land use categories. Overall, the District is projected to see a net increase of approximately 4,700 jobs between 2021 and 2051. However, this represents an increase of 11,150 jobs that are tied to employment land after accounting for the net decline of 6,440 Work From Home jobs as the impacts of the pandemic abate and more workers are called back to the office.

### Employment Projection by Land Use Class, District of North Vancouver, 2016-2051



Source: B&A Studios, using data from Metro Vancouver and Statistics Canada

These projections were then translated into future floor space needs based on an analysis of employment space utilization in each of the key land use categories, along with future assumptions for how these needs may change based on industry and market trends, combined with local constraints. This analysis was supported and informed by a parallel assessment that considered the total amount of retail floor space the District could support based on current population projections, market capture, and spending patterns. Overall, the District is projected to require just shy of 4.2 million square feet of additional employment space by 2051. Of that, a little less than 1.4 million square feet of net Commercial space demand is projected, roughly 80% of which is anticipated to be retail in nature. Institutional space demand is projected at just shy of 1.1 million square feet, while Industrial is projected at just over 1.7 million square feet.

#### Net Employment Change and Floor Space Demand, District of North Vancouver, 2021-2051

Net Employment Change	2021-2051	Share	Change
Commercial	4,750	43%	44%
Industrial	3,650	32%	49%
Institutional	2,750	25%	45%
<b>Total</b>	<b>11,150</b>	<b>100%</b>	<b>46%</b>

Net Floor Space Demand (sq. ft.)	2021-2051	Share	Change
Commercial	1,373,000	33%	21%
Industrial	1,707,000	41%	26%
Institutional	1,097,000	26%	29%
<b>Total</b>	<b>4,177,000</b>	<b>100%</b>	<b>24%</b>

Source: B&A Studios

To understand the implications of this projected employment and floor space demand, further analysis was conducted with regards to where such growth could be accommodated. Sub-area profiles were developed for several Town Centres and Villages identified by the District of North Vancouver Official Community Plan, along with a handful of other special study areas that represent key clusters and areas of opportunity for future economic growth<sup>2</sup>. These Key Growth Opportunity Area profiles considered various factors related to the existing supply of space and land, recent development and investment activity, market trends and locational preferences, and the capacity for future development under current land use policies and zoning.

<sup>2</sup> Includes the Marine Drive corridor, which is not its own Village Centre, but is considered to a special study area that forms part of the Lions Gate Village Centre.

Incorporating this analysis, an allocation of projected growth was developed between each of the key growth opportunity areas and the rest of the District. This allocation was presented in two scenarios:

- **Low Scenario:** represents the current trajectory of growth under existing market trends, and land supply and policy constraints.
- **High Scenario:** represents an ambitious but feasible future where the District is successful in shifting additional investment and employment activity towards these nodes through proactive land use policy, coupled with favourable market conditions.

#### Projected Distribution of Gross Floor Area Growth by Key Growth Opportunity Area, 2021-2051

Key Growth Opportunity Area	Commercial (sq ft)		Industrial (sq ft)		Institutional (sq ft)	
	Low	High	Low	High	Low	High
<b>Town &amp; Village Centres</b>	<b>604,000</b>	<b>892,000</b>	<b>188,000</b>	<b>341,000</b>	<b>132,000</b>	<b>373,000</b>
Deep Cove VC	14,000	27,000	-	-	-	11,000
Edgemont VC	41,000	69,000	-	-	22,000	33,000
Lions Gate VC	82,000	124,000	-	-	22,000	66,000
Lynn Creek TC	137,000	206,000	171,000	239,000	44,000	88,000
Lynn Valley TC	82,000	110,000	-	-	22,000	66,000
Maplewood VC	82,000	110,000	17,000	102,000	22,000	66,000
Marine Drive	165,000	247,000	-	-	-	44,000
<b>Industrial Areas</b>	<b>220,000</b>	<b>275,000</b>	<b>324,000</b>	<b>512,000</b>	<b>33,000</b>	<b>66,000</b>
Maplewood IA	110,000	137,000	120,000	239,000	33,000	66,000
Marine Drive IA	110,000	137,000	205,000	273,000	-	-
<b>Rest of DNV</b>	<b>549,000</b>	<b>206,000</b>	<b>1,195,000</b>	<b>854,000</b>	<b>932,000</b>	<b>658,000</b>
<b>Citywide Total</b>	<b>1,373,000</b>	<b>1,373,000</b>	<b>1,707,000</b>	<b>1,707,000</b>	<b>1,097,000</b>	<b>1,097,000</b>

Source: B&A Studios

- Commercial employment is projected to have the greatest potential to be accommodated in the Key Growth Opportunity Areas, with between 60% and 85% of projected employment activity likely to locate within these locations, spread between retail and office uses in mixed-use formats.
- Industrial growth is split between the industrial waterfront and Key Growth Opportunity Areas (specifically Lynn Creek, Maplewood and the Maplewood and Marine Drive Industrial Areas). Between 30% to 50% of net Industrial growth could be accommodated in the Opportunity Areas, depending on the District's ability to encourage multi-storey intensification of existing lands.
- Institutional growth opportunities are more dispersed across the District, primarily located in schools, including Capilano University, and other community facilities. Future Institutional growth within the Key Growth Opportunity Areas is projected at between 15% and 40%.

## SWOC Analysis

The findings of the Employment Lands Analysis are summarized in the following assessment of the District of North Vancouver's economy in terms of current strengths and weaknesses, along with future opportunities and challenges.

### Strengths

- The North Shore lifestyle is a strong attractor for businesses and customers alike.
- Natural amenities are a significant draw for tourism and film industry.
- The District's policies to direct growth towards key nodes supports development of complete communities that are distinct, with different offerings for a wide range of businesses.
- Proximity to Downtown Vancouver is seen as a plus for many businesses with linkages to the Central Business District and other centrally located industries.
- Competitive non-residential tax rates, particularly for heavy industrial users.
- Direct access to the Port of Vancouver provides unique advantages for shipping and shipbuilding related industries.
- The District's small businesses and local amenities contribute to the vibrancy of the Town and Village Centres while offering a range of goods and services.

### Weaknesses

- Housing affordability and cost of living are making it increasingly difficult for workers to live in the District, causing employers to face difficulties in attracting and retaining employees.
- Fully built out nature of employment land supply, coupled with extremely low vacancy rates, limits opportunities for existing businesses to grow and newcomers to invest in the community.
- Sustained periods of low vacancy rates have put upward pressure on market rents, reducing affordability for many businesses.
- Implementation of mixed-use development potential has driven up assessed land values in certain areas, which are being passed on to tenants via triple-net leases.
- Many existing buildings in light industrial areas are older in nature, and do not feature the design elements and amenities that make them desirable for modern businesses.
- Limited access points into and through the District and North Shore region create transportation bottlenecks that challenge businesses both in terms of attracting employees and ensuring the timely delivery of goods.

### Opportunities

- Capitalize on the linkages and access to natural amenities to both expand tourism and film-related activity, while also creating value for businesses choosing to locate in the District.
- Leverage natural beauty towards attraction for green, smart, and clean industries to contribute to emerging cluster of industry activity.
- Capitalize on pandemic-induced locational preference shifts to potentially attract new investment in office space for satellite spaces that are re-evaluating their space needs.
- Support coordination between local post secondary institutions and business community to equip graduates with the skills sought by local businesses.
- Conduct evaluation of light industrial and other mixed-use policies to ensure they are calibrated appropriately to unlock redevelopment potential for intended economic function.

### Challenges

- Competing needs for residential and employment spaces due to the lack of greenfield available for development.
- Competition for space between office and retail businesses is resulting in office functions locating at grade, impacting retail streets and hindering street front vibrancy.
- Continued threat of erosion and conversion of remaining industrial lands, including port and port-supporting lands, in the face of residential encroachment.
- Global inflation and overall affordability in the District could slow the rate of employment and economic activity as employers continue to face difficulties in attracting and retaining workers.
- Critical transportation bottlenecks outside of District's jurisdiction present logistical challenges for many local businesses that may increase as the region intensifies.
- Ageing population poses a risk to the economic productivity of the municipality as the local population ages out of the workforce.

## Key Takeaways

Based on the analysis of emerging trends, the implications of employment projections and associated land demand, and the general findings of the SWOC analysis, key takeaways to be considered for the Economic Development Strategy have been summarized as follows:

### District-wide

- Review current land use zoning permissions and supplementary policies to ensure they permit and encourage the development of space for preferred forms of economic activity.
- Preserve the remaining industrial land supply.
- Consider expanding the permitted non-residential activities in select light industrial zones and designations to encourage the redevelopment of strategically located industrial stock at higher densities, while still maintaining the intended economic function.
- Form collaborative partnerships to determine the best possible use of industrial lands nearby the Port.
- Encourage the development of a mix of housing options in proximity to employment nodes that support local employers.
- Explore opportunities to incentivize the inclusion of live-work spaces for small businesses and offices in mixed-use residential redevelopment.
- Review mixed-use redevelopment requirements to ensure no net loss of employment space in key employment clusters.
- Review zoning permissions for commercial and mixed-use developments along commercial main streets to ensure a vibrant mix of ground floor retail and services.
- Explore policy options to encourage or require office functions to be directed to above grade commercial spaces.
- Partner with neighbourhood-level business organizations to coordinate programming of public spaces through ground-up initiatives to encourage vibrancy and activation of commercial nodes.
- Allowing for the zoning of small retail hubs into residential areas outside of key commercial nodes to provide amenities and daily essentials.
- Improve connectivity between key commercial nodes, community amenities, and highly frequented public buildings to facilitate seamless mobility in addition to access to businesses along these corridors.

### Key Economic Growth Opportunity Areas

- Allow the key opportunity areas to become destinations of choice by activating public spaces, plazas, and streets to create attractive and unique qualities attractive to businesses, residents, and visitors.
- Conduct a review of density and related zoning policies and types of development on OCP-designated industrial District-owned land in North Maplewood, to create alignment of land use and activities that will accommodate employment growth due on a future constrained industrial land footprint in the area.
- Work in partnership with Tsleil-Waututh First Nation to support the potential development of the Statlōw District in meeting the projected demand for goods and services as well as employment growth.
- Assess the density, built form, and mix of industrial, office, and commercial uses permitted under key opportunity light-industrial areas, such as Lynn Creek, Maplewood, and Pemberton/Marine Drive.
- Introduce a Commercial Office policy framework, including density bonusing in high-growth mixed-use and light industry intensification opportunity areas, such as Lynn Creek, Maplewood, Lion's Gate and surrounding commercial and industrial areas.
- Determine a baseline requirement for Commercial (Retail & Office) spaces along transit-oriented development corridors (such as Marine Drive) and within the areas identified as Transit Oriented Areas under recent provincial legislation to ensure employment space is provided alongside housing in areas of concentrated growth.



## 1.0 INTRODUCTION

The District of North Vancouver retained a consulting team lead by B&A Studios, in collaboration with Urban Systems and Lions Gate Consulting, to assist in the development of an Economic Development Strategy (EDS). The Strategy will serve as a road map to achieve the District's economic objectives through specific, measurable achievable, relevant, and time-bound actions and an accompanying implementation plan.

As a foundation to the EDS, this Employment Lands Analysis (ELA) report provides both a quantitative and qualitative assessment of the history, current conditions, and emerging trends affecting business and employment change in the District of North Vancouver. In doing so, the ELA identifies the challenges, opportunities, and growth prospects for economic growth, informing the development of an effective and actionable Economic Development Strategy.

### 1.1 How the Employment Lands Analysis Informs the Economic Development Strategy

With the adoption of the 2011 Official Community Plan (OCP), the District made it a policy objective to support a diverse and resilient local economy that provides quality employment opportunities by the year 2030. To make this happen, the OCP set a strategic direction to become more economically dynamic and sustainable by encouraging the protection, intensification, and diversification of its employment lands, along with creating a customer-oriented and business-friendly environment. Through a series of targets and associated policies, the District has since made considerable progress towards these goals, with notable employment growth across various sectors, attracting and growing local businesses within the community.

However, the District faces several challenges to continued success due to more recent changes and events. Factors such as affordability, lack of housing, and infrastructure constraints are putting strains on existing and prospective employers in the District. Meanwhile, changing economic trends in the wake of the global COVID-19 pandemic have resulted in significant shifts in how and where we work and do business, warranting a reconsideration of how to plan for future economic growth. In an era where technology continues to reshape the workplace with advancements in areas including automation and artificial

intelligence, in addition to the increased prevalence of Work From Home and hybrid work arrangements, the demand for different types of employment land and built space are continuing to evolve.

With these factors in mind, this report aims to:

- Present a snapshot of the employment and economic context in the District of North Vancouver and its place in the broader Metro Vancouver Region based on the most recently available data for jobs, businesses, land, and employment space.
- Conduct a trend analysis of change over time to understand how current conditions came to be, along with implications future job growth and floor space needs.
- Prepare growth projections for jobs and space based on regional data and additional analysis, including allocations of growth to key growth areas across the District.
- Prepare a summary analysis of the Strengths, Weaknesses, Opportunities and Challenges as it relates to the District of North Vancouver's economy and its prospects for future growth, along with key takeaways and direction for the development of the EDS.

## 1.2 Methodology

The following methods were used to develop the Employment Lands Analysis:

- A comprehensive review and understanding of the District of North Vancouver's Official Community Plan (2011) supplemented by the Targeted Official Community Plan Review Action Plan: 2021-2030 (2021) and Official Community Plan white papers (2020) examining the four key areas of housing, transportation, climate emergency, and economy and employment lands.
- A literature review of recent studies, reports, strategies, and available data related to population and employment growth, economic and employment trends, and land use trends prepared by the District of North Vancouver, the North Shore Chamber of Commerce, neighbouring municipalities, Metro Vancouver, Statistics Canada, CoStar and other local brokerages, and other economic research organizations.
- An up-to-date review of building and business permit activity, land use policy, and other geospatial data made available by the District of North Vancouver to:
  - Calculate the existing amount and use of lands and built space designated for Industrial, Commercial and Institutional uses;
  - Identifying vacant or underdeveloped land; and
  - Explore current and future opportunities for employment land.
- Evaluation of special run data prepared by Statistics Canada regarding employment with a place of work located in the District of North Vancouver for the last four census periods (2006-2021) to

understand historic trends and shifts amongst local employment and its relationship to land.

- An assessment of Metro Vancouver’s population and employment projections through to 2051, and their potential implications for employment land and developed space demand based on floor space per worker and work from home trends in various employment sectors. These projections were assessed against similar growth projections for retail spending supported space demand prepared by Urban Systems.

This analysis was supplemented by engagement with community partners and members of the local business community, including:

- An online engagement survey conducted through the District of North Vancouver’s website from September 11 to October 8, 2023, which gathered 282 valid responses from residents and business owners and operators within the District.
- Three in-person workshops with invited members of the local business community, along with community partners and subject matter experts, including representatives from neighbouring municipalities, the Port of Vancouver, representatives from local First Nations communities, and an inter-departmental working group of staff from the District of North Vancouver.

A summary of the consultation work and its findings is provided in a separate appendix of the EDS.

## 1.3 Classifying and Measuring Employment

### 1.3.1 Key Land Use Categories

For the purpose of this report, employment and space demands and needs for the District’s economic activity has been categorized into three key land use categories: **Industrial**, **Commercial**, and **Institutional**. These land use categories are closely associated with the general non-residential employment land designations identified in the OCP, which are indicative of the types of economic activities that are permitted to occur thereon.

#### Industrial

- Operations on industrial land use are generally associated with the production and distribution of goods, infrastructure, and other supporting services. Related industries found in the District include warehousing, construction, wholesale trade, specialty trade contractors, manufacturing, and port-related uses. Limited office and retail uses may also be permitted on industrial sites.
- Traditional heavy industrial built form is often characterized by low-rise buildings that typically require large floor plates and flat parcels to accommodate their activity. These types of activities

can potentially result in externalities, including noise, vibration, odours, and heavy vehicle traffic, all which require physical separation or mitigation measures to prevent conflict with other sensitive land uses, like residential.

- Light industrial uses also fall under this category and are distinguished by their smaller footprint and more limited externalities. Areas designated for light industrial mixed-use uses may see a combination of industrial, warehouse, office, service, and business park type uses. Light industry typically requires a smaller buffer to adjacent land uses than heavy industry, and often serves as a good buffer use itself.

## **Commercial**

- Commercial land use in the District encompasses a broad range of economic activity including retail shops, restaurants, office, and other service-focused functions that typically involve the trading or the exchange of goods and services to consumers and the public.
- Areas designated for commercial use may be exclusively reserved for commercial businesses or may permit a mix of uses that allow for a mix of residential and commercial uses within the same parcel or building. Mixed-use areas typically provide for commercial functions at-grade or in the lower portion of buildings, with residential components included above.
- Commercial activities can be accommodated by built forms ranging from offices and stand-alone retail buildings, to malls and units in mixed-use buildings.

## **Institutional**

- Institutional areas are designated with the intention of providing a range of public assembly uses such as public school, universities, recreation centres, hospitals, places of worship, and other public buildings.
- Institutional employment activities generally provide community-focused services, such as education, health care, and governance and other forms of public administration.
- Related commercial and accessory residential uses may be permitted at these sites.

### **1.3.2 North American Industry Classification System (NAICS)**

Employment uses and their respective land needs can vary considerably between types of jobs and businesses. To understand these relationships in terms of both historic trends and future prospects for local employment growth, the ELA primarily relies upon data obtained from Statistics Canada (which counts historical employment over time) and Metro Vancouver (which has prepared future regional projections of employment growth). Both sources are classified using the North American Industry Classification System (NAICS). NAICS divides the economy into twenty sectors identified with two-digit codes, with industries

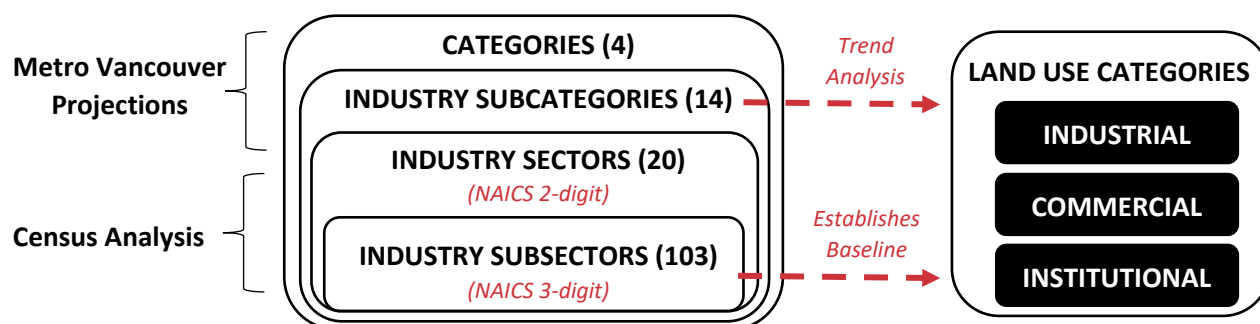
within these sectors further grouped according to the production criterion identified by three- to six-digit codes depending on specificity.

Regional data provided by Metro Vancouver roll these NAICS sectors up into 4 overarching Categories and 14 Industry Subcategories. The relationship between the Categories, Sub-Categories, and Sectors is illustrated in Figure 1 below and Table 1 on the following page. For this report, the Categories and Sub-Categories are utilized for the purpose of providing high-level analysis and reporting on general trends amongst similar employment types in a clear and concise manner that is easy to track against other sources.

When it comes to understanding employment uses amongst the three different land use categories, the lines between the high-level categories begins to blur. For example, some public administration employment may locate in commercial office space, while some restaurants or professional service offices may be found in industrial areas. To produce the land use analysis, baseline employment counts for each land use category were calculated using historic Census figures provided by at the subsector (three-digit) level, which provides a greater degree of granularity and distinction between activity. A detailed table of the NAICS groupings, land uses, and employment count used for analysis can be found in **Appendix A** of this report.

It is important to note upfront that these groupings are by no means definitive, and certain overlap between categories may exist. Currently, NAICS data is only available at the Census Subdivision (municipal) level, which limits the granularity of analysis possible. As such, the employment figures shown for the land use categories, future projections of demand, and allocation of employment at the neighbourhood level each represent estimates for the purpose of this study.

**Figure 1: Conceptual Industry Groupings for the Purpose of the ELA**



**Table 1: Industry and NAICS Code Groupings**

Industry – North American Industry Classification System (NAICS) 2012		
Categories	Industry Subcategories	Industry Sectors
(#4)	(#14)	(#20)
Primary	Primary	11 Agriculture, forestry, fishing and hunting
		21 Mining, quarrying, and oil and gas extraction
Industry	Transportation Warehousing	48-49 Transportation and warehousing
	Construction	23 Construction
	Manufacturing	31-33 Manufacturing
	Wholesale	41 Wholesale trade
Commercial Service	Retail	44-45 Retail trade
	Finance and Real Estate	52 Finance and insurance
		53 Real estate and rental and leasing
	Management, Admin, and Other Services	55 Management of companies and enterprises
		56 Administrative and support, waste management and remediation services
		81 Other services (except public administration)
	Information and Cultural Industries	51 Information and cultural industries
		71 Arts, entertainment and recreation
	Professional Technical	54 Professional, scientific and technical services
	Accommodation Food	72 Accommodation and food services
Public Admin or Social Institutional	Education	61 Educational services
	Health and Welfare	62 Health care and social assistance
	Public Admin	22 Utilities
		91 Public administration

## 1.4 Data Limitations

Preparing an analysis of employment and space use at a local level can be met with several challenges associated with data collection and comparability. The process is dependent on the availability of reliable data for the scope of analysis. Many jurisdictions utilize different methodologies to track and report their employment and economic figures, while changes to data collection and reporting methodologies can further muddy the waters. Several key limitations on the data used for the Employment Lands Analysis are summarized as follows.

### The COVID Pandemic and the 2021 Census

The primary source of data used in this analysis regarding population, employment, and mobility at the municipal level is from Statistics Canada, most notably the Census of Canada. The Census serves as the foremost tool for assessing local and regional change over time in Canada and is one of the only standardized accounts of employment between municipalities over time.

Because the Census is only conducted once every five years, it limits the ability to conduct comparisons and track certain sectoral trends in the interim period. The data from the most recent Census data is also considered challenged on account of when the most recent survey was conducted, in May of 2021. This occurred at a time when the impacts of the COVID-19 pandemic and the related lockdowns were still quite acute, with only some businesses operating in a traditional manner, while others were in the process of furloughing workers or temporarily shutting down.

The pandemic also resulted in significant shifts in where and how we work, meaning that the most recent data collected may not be representative of future economic and employment trends. Take for example the sudden shift in regularly reported place of work. Census data shows a considerable shift to Work From Home as primary place of work, which tracks with broader trends at the time given the lockdowns and resulting workplace accommodations that were occurring in May of 2021. As a result, some data specific to the District's employment activities from the most 2021 Census may not be truly representative of actual employment counts, locational preferences and trends as we emerge from the shadow of the pandemic.

### The National Household Survey

Additionally, it should be noted that employment data collected by Statistics Canada in the form of the mandatory census questionnaire for the 2006, 2016, and 2021 census years, was collected as part of the voluntary National Household Survey (NHS) in 2011. Because responding to the NHS was not required by law, many households did not complete the survey. As such, the NHS results may not fully reflect the population as accurately as the data collected from the long-form census in the other years. The long-form

census was subsequently reintroduced in 2016 to provide a better representation of the Canadian population.

### **Floor Space Estimates**

Floor space inventories in each land use category have been estimated utilizing the District of North Vancouver's building footprint data. This data set includes the area of the building footprint and number of stories but does not include an accurate count of actual Gross Floor Area (GFA). To account for this, total GFA is estimated as a function of the footprint and building, but it may not account for discrepancies within certain buildings (i.e. upper floors that have a smaller footprint due to step backs or mezzanine layouts).

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To prepare a comprehensive Employment Lands Analysis, every effort has been made to resolve differences and gaps between data sources as to present a comprehensive picture of both current and future employment in terms of both jobs and space needs. No data set is perfect, and every single source of data has inherent limitations and inconsistencies based on how, when and why it was collected. Where possible, data sets have been cross-checked and supplemented by a range of sources, including the Statistics Canada Labour Force Survey, market brokerage data, and consultation with community members, municipal staff, and subject matter experts.



## 2.0 THE DISTRICT'S ECONOMY IN CONTEXT

### 2.1 A Brief Economic History of the District of North Vancouver

Prior to the incorporation of the District of North Vancouver and the North Shore region as we know it today, the lands and waters of the north shore and Burrard Inlet served as the ancestral territory of the səilwətał (Tsleil-Waututh), Skwxwú7mesh Úxwumixw (Squamish), and xʷməθkʷəy̓əm (Musqueam) of the Coast Salish peoples. The inlet and surrounding environment provided resources for food and shelter for the Indigenous peoples, who maintained their own forms of economic cooperation and activity for centuries.

It was not until the late 18<sup>th</sup> century that Spanish explorers and the English troop led by George Vancouver entered the inlet and landed on local shores. The rich forests, wooded terrain, and proximity to the waters captivated European settlers with the potential to harvest timber and create an economy based on timber trade and transshipment, leading to the establishment of the first settlement and industry, Pioneer Mills, in the area in the 1860s<sup>3</sup>.

Shortly after the sawmill was built, European settlement in the area began to grow rapidly into the largest settlement on the inlet. Following transactions, the sawmill was sold to Sewell Moody and the town became known as Moodyville in the 1870s. The incorporation of the District of North Vancouver in 1891 included all the territory along the North Shore except for Moodyville. Today, the North Shore consists of the City of West Vancouver, District of North Vancouver, and the City of North Vancouver – what once was Moodyville was later annexed by the City of North Vancouver<sup>4</sup>.

Regionally, the broader Vancouver area secured its importance as a shipping hub and quickly became a major economic gateway. Operating as an important port for lumber, ore, and grain, the shipyards along the shores of North Vancouver became a central part of Canadian economy for most of the 20<sup>th</sup> century, bringing economic prosperity and rapid growth into the area.

More recently, tourism, technology, and filmmaking have also propelled the economy of North Vancouver with outdoor attractions, film studios, and film permits becoming a significant source of revenue for the City and District. The District's easily accessible interface with nature, including ocean shores, parklands,

<sup>3</sup> Woodward-Reynolds, Kathleen Marjorie. "A History of the City and District of North Vancouver"

<sup>4</sup> North Shore Heritage Preservation Society. "A Brief History of the North Shore"

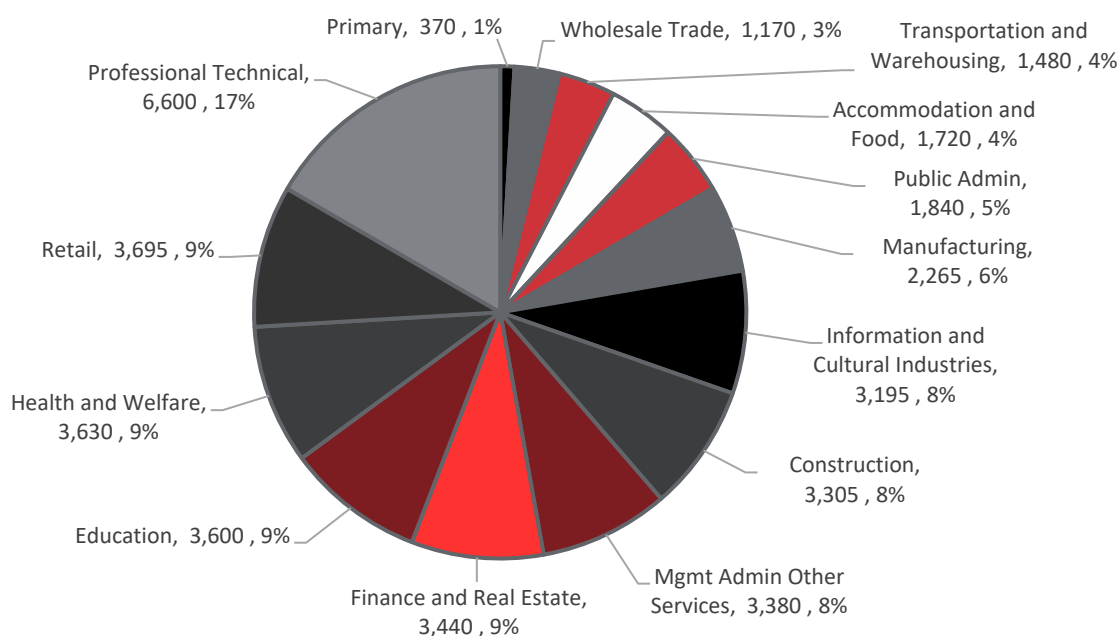
and mountainous terrain offer activities ranging from fishing, climbing, skiing, to sailing has made the municipality an in-demand, year-round recreational centre.

Today, the District of North Vancouver houses many valuable economic assets and activities across its many employment land uses. The mix of existing business and key industries, coupled with a growing population of highly educated residents and a very desirable mix of natural and built amenities make the community a competitive location to invest, work, and do business.

## 2.2 A Recent Snapshot of the District's Economic Profile

As of the latest statistics from the 2021 Canadian Census, the District of North Vancouver served as home to over 88,160 people and accommodated 39,690 jobs spread across a range of industries. The composition of these jobs by industry subsector is shown below in Figure 2.

**Figure 2: Employment Profile by Industry Subsector, District of North Vancouver, 2021**



Source: Statistics Canada

At a high-level, the District's economy is comprised of Commercial Services (54%), Industrial uses (24%), Institutional uses (22%), and Primary uses (0.5%). Professional Technical employment represented the largest Industry Subcategory in the District at 17%, nearly double that of the next five largest Subcategories

of Retail, Health and Welfare, Education, Finance and Real Estate, and Management Administration and Other Services, each of which accounted for 9% of total employment, respectively.

Digging a bit deeper, Table 2 shows DNV's top ten industry subsectors (3-digit NAICS) recorded in the 2021 Census, with Professional, Scientific and Technical services taking the spot for largest industry by nearly double the number of workers of Educational Services, the second largest sector. As with the distribution of jobs shown previously in Figure 2, the largest industries by employment are mostly services conducted in office settings like financial and technical services, on site locations such as construction, and essential services including educational and ambulatory services.

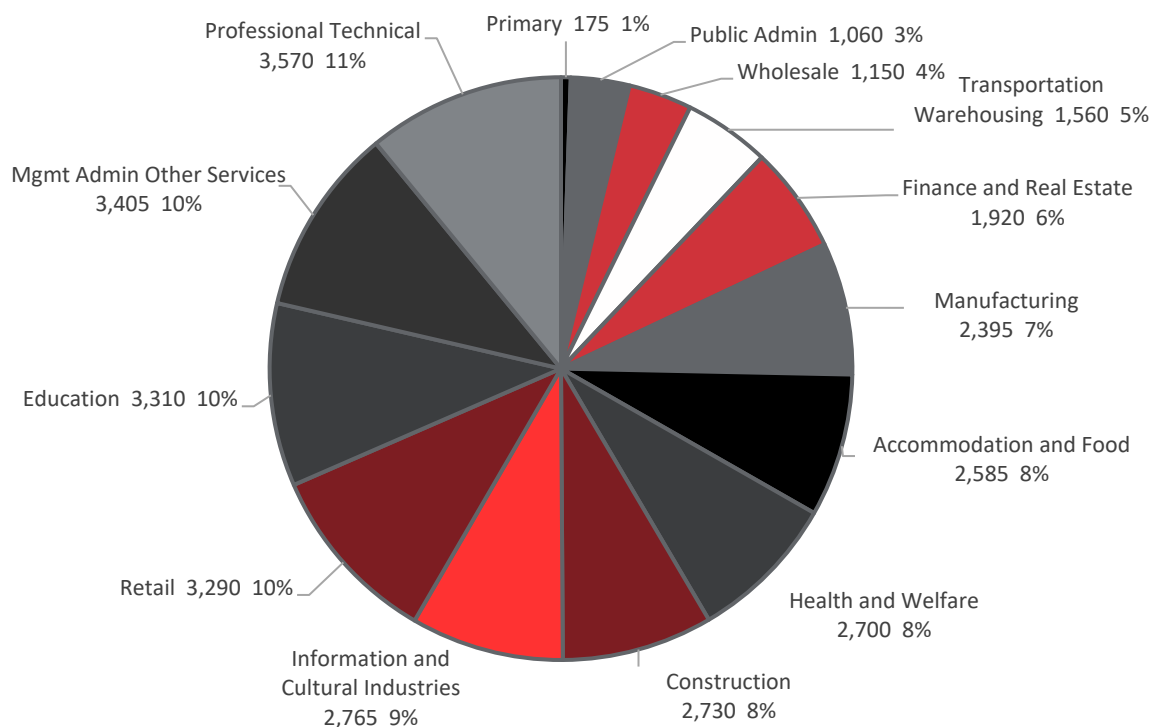
**Table 2: Top 10 Largest Industry Subsectors in DNV by Employment (3 digit NAICS Code), 2021**

Industry Subsector	Land Use	Total Employed
541 Professional, scientific and technical services	Commercial	6,600
611 Educational services	Institutional	3,600
238 Specialty trade contractors	Industrial	1,710
722 Food services and drinking places	Commercial	1,540
621 Ambulatory health care services	Institutional	1,525
445 Food and beverage stores	Commercial	1,430
561 Administrative and support services	Commercial	1,380
236 Construction of buildings	Industrial	1,325
531 Real estate	Commercial	1,130
336 Transportation equipment manufacturing	Industrial	1,100

Source: Statistics Canada

It is important to note that this most recent snapshot of the District's economic profile represents a point in time when the Census was conducted, May 11, 2021 – a moment where the impacts of the COVID-19 pandemic were particularly acute, with many businesses only starting to return to work from the mid-pandemic lockdowns, and many workers working from home. This had a profound impact on the District's employment count and makeup, as evidenced by the significant jump in jobs from the 32,695 jobs located in the District at the time of the previous Census in 2016. Not only did this represent an increase by more than 7,000 jobs, but it also resulting in a considerable shift in the District's economic composition by job type, as shown in Figure 3 on the following page.

**Figure 3: Employment Profile by Industry Subsector, District of North Vancouver, 2016**

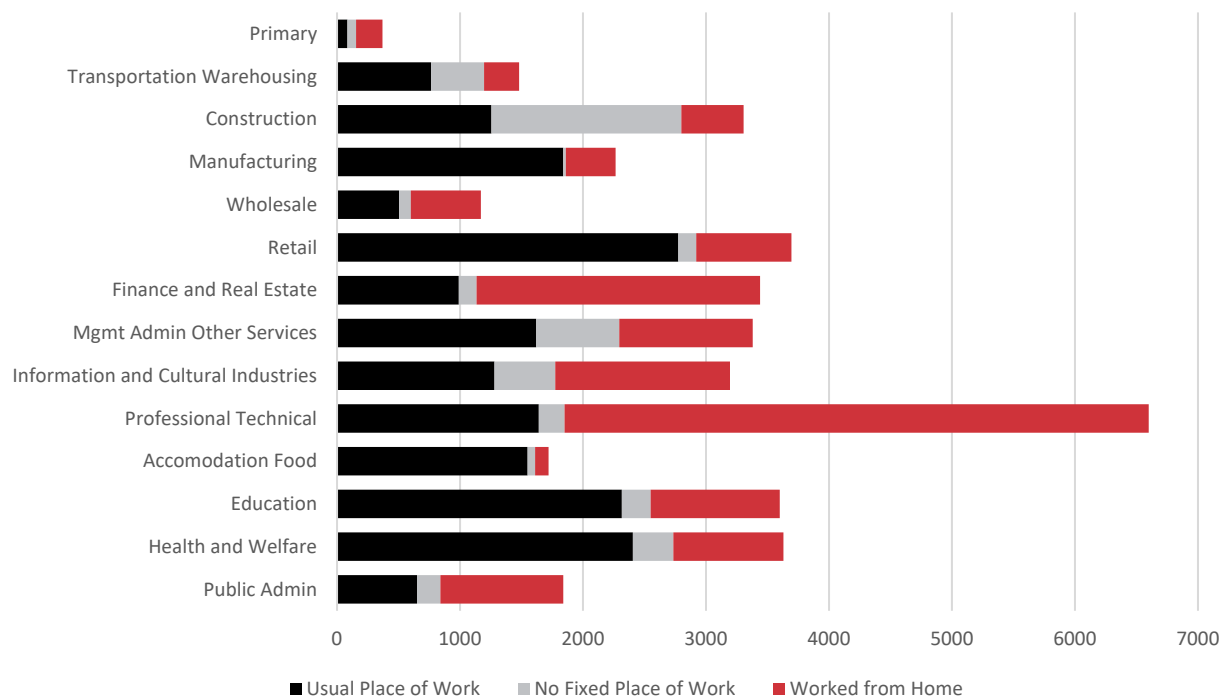


Source: Statistics Canada

While Professional Technical jobs still accounted for the largest subcategory, its prominence was far less pronounced in 2016, with other subcategories accounting for a more even share of the overall pie. Accommodation and Food in particular, is noteworthy, as it experienced its share of overall employment fall from 8% to only 4%, or nearly half, between 2016 and 2021. This is primarily attributed to the furloughing of many tourism and service-focused jobs during the worst of the pandemic.

The ability for certain jobs to work at home was the primary reason for much of the job growth that occurred in the District in 2021. Many office-based professional, technical, and other 'white collar' jobs, which otherwise were likely to be located in major offices in Downtown Vancouver and other regional hubs instead, now found themselves working from home rather than commuting elsewhere. As many of the District's residents are employed in these kinds of roles, the resulting shift in job location significantly increased the local job count. This is evident as shown in Figure 4 on the following page, which breaks out District of North Vancouver jobs by industry subcategory and whether these jobs reported to a Usual Place of Work in the District, had No Fixed Place of Work, or Worked at Home.

**Figure 4: Employment by Industry Subcategory and Place of Work, District of North Vancouver, 2021**



Source: Statistics Canada

Of the 39,690 jobs located in DNV in 2021, nearly half of the workers reported to a usual place of work (49%) with the rest split between Work From Home (39%) and No Fixed Place of Work (12%).

These figures, however, only paint a surface level picture of the Place of Work split and its implications for future growth. The Place of Work figures are dependent on the specific industry subcategory of employment and their nature of work. For example, 75% of jobs in the Retail category and 90% in the Accommodation Food category reported to a Usual Place of Work. Meanwhile, 47% of jobs in the Construction category reported having No Fixed Place of Work, as job sites related to this activity often vary depending on the day. Conversely, nearly 72% of jobs in the Professional Technical category reported to have Worked From Home. Each of these splits has significant implications for how employment is tied to land and built space, and how much of each might be required to accommodate future growth opportunities.

### A Note When Considering the 2021 Census Data

The observed shifts in place of work from the 2021 Census have significant implications for employment and economic planning. The demand for space in different categories deviated sharply from historic norms, bringing into question the trajectory of growth and the need for different kinds of space into the future.

The 2021 Census reflected a moment when some of the worst of the pandemic related disruptions were still ongoing, and the substantial shifts illustrated are unlikely to persist at the same level for employment and employment space need trends moving forward. That said, certain factors – such as the subsequent shift towards flexible hybrid Work From Home employment – represent trends that were already beginning to appear before the first of the pandemic-related lockdowns. In these cases, the pandemic may have merely accelerated the shift.

Where possible, data from the previous 2016 Census along with more recent regional data from the Labour Force Survey and other market brokerage reports have been used to develop a more fulsome picture of employment trends both before and after the pandemic, and their implications for future growth. External factors including population growth resulting from immigration, employment growth from new businesses and increased number of residents Working From Home are also considered in these projections of future employment space and subsequently, living space needs. These factors are discussed in greater detail in Chapter 3 of this report.

## 2.3 Local Business Activity

Local Business Permit activity provides additional context for where and how people work and choose to do business across the District<sup>5</sup>. In 2023, the District issued 3,516 business licenses of which 1,584 businesses (45%) were Home Based businesses. Out of the 3,516 licensed businesses, only 14 had more than 100 employees while 3,485 of the businesses had less than 50 employees. 3,304 businesses, representing 94% of the businesses captured by the business permit data, reported to have less than 10 employees. The

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<sup>5</sup> The data presented in this section includes employment counts linked to municipal addresses as tracked by the City's business permitting process for the year 2023. Business permit data does not pick up all forms of local employment (such as institutional jobs like teachers and health care workers) and Statistics Canada does not publicly release employment data to this degree of granularity beyond a municipal level. As such, the business permit data does not present a direct comparison with Census data and is recommended for high-level spatial analysis only.

following table categorizes business permit distribution under general and home-based businesses by land use class.

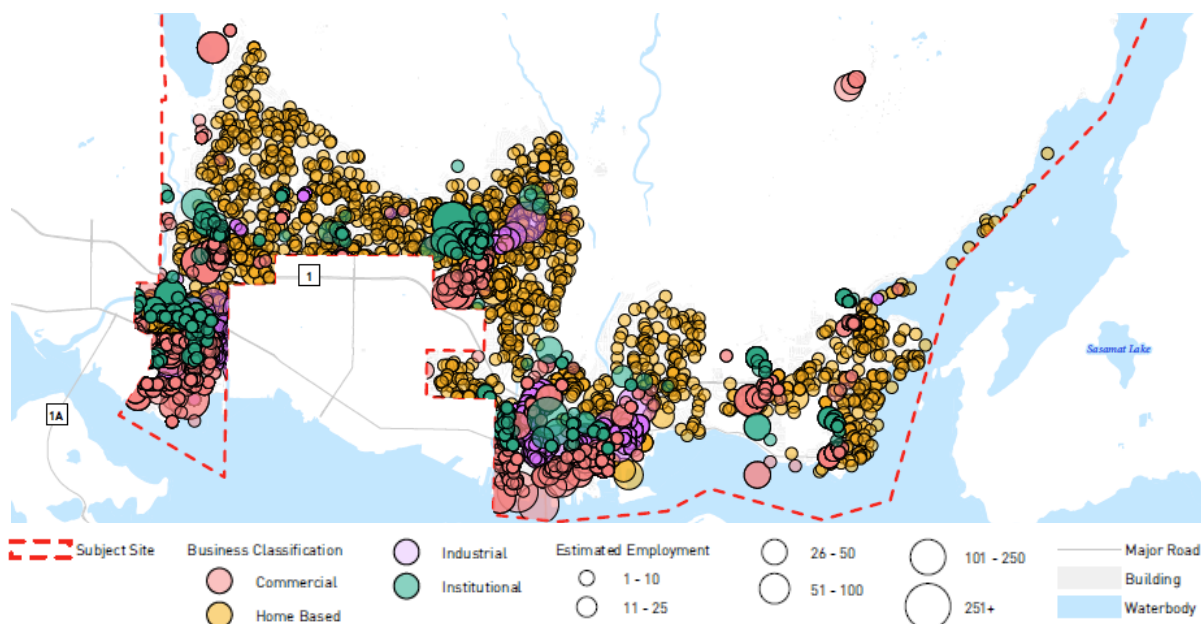
**Table 3: Business Permit Distribution by Land Use Class, 2023**

	General	Home-Based
Industrial	519	466
Commercial	1,014	762
Institutional	399	356
<b>Total</b>	<b>1,932</b>	<b>1,584</b>

Source: District of North Vancouver

The distribution of these business licenses shown in Figure 5 illustrates the linkage between employment land policies and economic activity. Much of the District's employment lands are clustered around key nodes, such as the Town Centres, Village Centres, and Industrial areas identified in the District's OCP. Licensed businesses tend to cluster in these areas, reflecting the influence employment land policy has on where and how businesses can operate. Meanwhile, Home-Based businesses are relatively dispersed across the District. Businesses boasting higher employment are also found concentrated in the key nodes while smaller businesses are found in both key nodes and surrounding areas.

**Figure 5: Distribution of Jobs by Business Permit Address, District of North Vancouver, 2023**



Source: B&A Studios, adapted from data provided by District of North Vancouver.

Most industrial businesses are, not surprisingly, concentrated almost exclusively in Industrial areas that permit for these kinds of activities. Meanwhile, commercial and institutional type businesses are somewhat more flexible in their locations, being spread out across a range of Commercial, Industrial and mixed-use land use designations. It should also be noted that most institutional jobs such as health care workers or teachers do not typically require a business permit which accounts for the comparatively low distribution of Institutional business permits.

The distribution of business permits by industry sector is shown in Table 4 below. Health Care and Social Assistance permits come out at the top of the list for number of business permits issued for general businesses. These businesses typically represent registered health care professionals providing medical or related services at private hospitals, dental offices, or health clinics. The rest of the top five most common sectors for business licenses reflect numerous smaller businesses spread across Retail Trade, repair and maintenance (Other Service), Accommodation and Food Service and Construction based businesses.

**Table 4: Business Permit Distribution by Top 5 Industry Sectors (2-digit NAICS), 2023**

General Businesses – Top 5 Sectors by Number of Permits Issued	
62 Health care and social assistance	277
44-45 Retail trade	250
81 Other services (except public admin)	207
72 Accommodation and food service	180
23 Construction	171
Home-Based Businesses – Top 5 Sectors by Number of Permits Issued	
23 Construction	387
54 Professional, scientific, and technical services	341
62 Health care and social assistance	275
56 Administrative and support, waste management and remediation services	173
81 Other services (except public administration)	86

Source: District of North Vancouver.

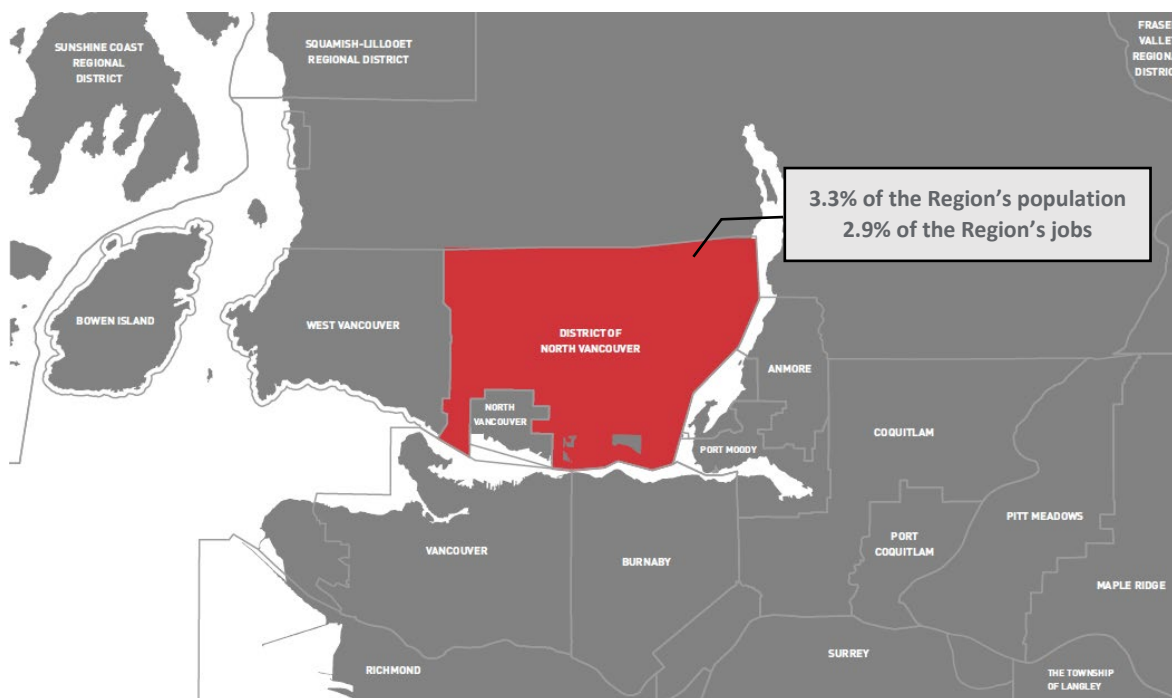
For home-based business licenses, the Construction sector totaled greatest number of permits issued. Many workers for these businesses do not report to a Usual Place of Work but instead to varied locations depending on the day; therefore, a substantial amount of these business permits are issued to contractors who base their operations out of their place of residence. Similarly, many permits issued for home-based businesses are for those who provide services ranging from consulting, technological services to hair styling and equipment reparations from a home office type setting.



## 2.4 The District in the Context of the Economic Region

When it comes to economic planning, it is important to recognize that the District is not an island, but one of many players amongst a much larger set of regions and markets, each interconnected in how they attract and accommodate business, labour, and investment. The District of North Vancouver is one of the 21 municipalities and 23 local authorities in the Metro Vancouver Regional District. Together, the 23 member jurisdictions form the Vancouver Census Metropolitan Area (CMA) which provides an additional layer for Statistics Canada to track population in various aspects through the Census. The District's context in this broader market is illustrated in Figure 6 and Table 5 below.

**Figure 6: The District of North Vancouver and the Metro Vancouver Region**



**Table 5: Population and Employment Rates, 2021**

	North Vancouver DM	Vancouver CMA	Share
Population	88,168	2,642,825	3.3%
Employment	39,690	1,348,540	2.9%

Source: Statistics Canada.

In 2021, the District of North Vancouver accounted for 3.3% and 2.9% of the region's total population and jobs, respectively.

Table 6 shows a further breakdown of the District's share of regional employment by high-level industry categories. The District has a fairly even distribution of regional employment across the four categories, with a higher local share of general Commercial and Institutional employment.

**Table 6: Employment Categories, District of North Vancouver and Metro Vancouver, 2021**

	North Vancouver DM	Vancouver CMA	Share
Primary	370	15,070	2.5%
Industrial	8,220	324,960	2.5%
Commercial	22,030	675,810	3.3%
Public Admin & Social Institutional	9,070	332,700	2.7%

Source: Statistics Canada.

Further details regarding the District of North Vancouver's economic specialization in the context of the Metro Vancouver region are illustrated by calculating Location Quotients<sup>6</sup> (LQs) for each industry. Table 7 on the following page shows a comparison of the Location Quotients of the District pre-pandemic in 2016 and mid-pandemic in 2021.

The numbers highlighted in green indicate sectors where DNV a particular specialization within the Metro Vancouver economy, with the darkest green being the highest levels of specialization. Similarly, the numbers highlighted in red indicate sectors that have relatively small presence in DNV compared to the region, with the darkest red being the lowest comparative presence.

<sup>6</sup> Location quotients are ratios that allow an area's distribution by industry to be compared to a reference area's distribution. In this case, it measures the concentration of employment by each NAICS sector located in the District of North Vancouver as a function of the overall spread of that industry across Metro Vancouver. A location quotient in excess of 1.2 imply that a jurisdiction specializes in an industry, which in turn implies that localization economies may be present.

**Table 7: Location Quotients, 2016 & 2021**

Industry Sectors – NAICS 2017 (#20)	2016 LQ	2021 LQ	Change
71 Arts, entertainment and recreation	1.90	1.90	(0.00)
61 Educational services	1.35	1.16	(0.19)
81 Other services (except public administration)	1.19	1.06	(0.13)
31-33 Manufacturing	1.15	0.97	(0.18)
23 Construction	1.13	1.03	(0.10)
51 Information and cultural industries	1.12	1.15	0.03
53 Real estate and rental and leasing	1.11	1.16	0.05
54 Professional, scientific and technical services	1.10	1.47	0.36
56 Administrative and support, waste management and remediation services	1.06	0.90	(0.16)
21 Mining, quarrying, and oil and gas extraction	0.98	2.09	1.12
72 Accommodation and food services	0.96	0.74	(0.22)
44-45 Retail trade	0.90	0.83	(0.07)
48-49 Transportation and warehousing	0.84	0.63	(0.21)
41 Wholesale trade	0.82	0.74	(0.08)
62 Health care and social assistance	0.79	0.78	(0.01)
91 Public administration	0.70	0.86	0.16
55 Management of companies and enterprises	0.63	1.26	0.62
22 Utilities	0.60	1.19	0.59
52 Finance and insurance	0.58	1.16	0.57
11 Agriculture, forestry, fishing and hunting	0.39	0.45	0.05

Source: Statistics Canada.

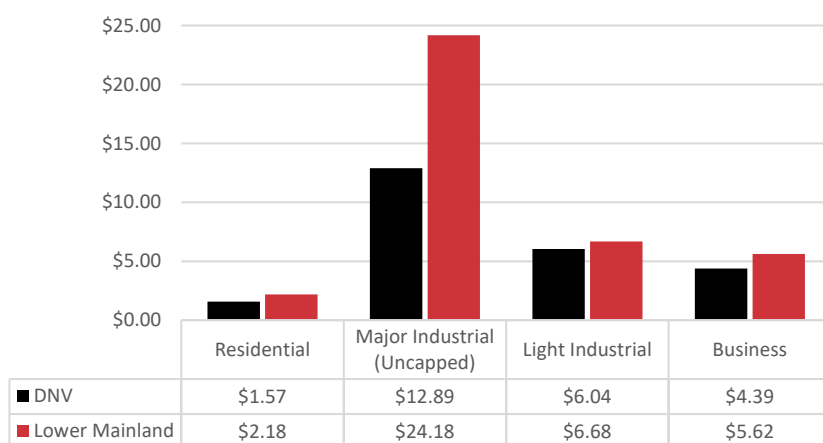
Through the 2016 LQs we can see that the District is home to a significant concentration of Arts, Entertainment, and Recreation related employment, along with a notable concentration of Education related employment. This is primarily due to the recreational programming served by the North Shore

mountains and the presence of Capilano University's main campus being in the DNV. Other noteworthy concentrations include Other Services, Manufacturing and Construction, largely driven by numerous repair-focused industrial businesses, along with a notable concentration of construction contractors.

The comparative concentration of employment in many of these sectors declined modestly in 2021, largely because of pandemic related shifts in where and how people were working. These same shifts resulted in a striking increase in the LQs of many white-collar industries, such as Professional, technical, and scientific (+0.36), Mining, quarrying and oil and gas extraction (+1.12), Management of companies and enterprises (+0.62), Utilities (+0.59), and Finance and insurance (+0.57). Each of these sectors is primarily comprised of technical, management and specialist roles which tended to be the most adaptable to Work From Home.

Another potential reason for the concentration of certain businesses in the District is its non-residential tax rate. Figure 7 illustrates a comparison of the average 2022 Tax Rate per \$1,000 Assessed Value in the District with the rest of the Lower Mainland. Overall, DNV imposes a lower tax rate for residential employment land uses, with Major Industrial notably taxed at nearly half the Lower Mainland average rate. This indicates that DNV appears to be a favourable location for businesses to locate, particularly for those focused on heavy manufacturing and other major industrial activities. This comes with the caveat, however, that some of these reduced mill rates may be offset by the comparatively higher land values of the North Shore, which are a function of land scarcity, market demand, and development potential - particularly for employment uses in mixed-use land designations.

**Figure 7: Tax Rate Benchmark per \$1,000 Assessed Value, 2022**



Source: District of North Vancouver.

## 2.5 Southwestern British Columbia

Beyond Metro Vancouver, the District is also affected by more macro-level trends. British Columbia has eight distinct economic regions as shown in Figure 8. Metro Vancouver along with Fraser Valley, Squamish-Lillooet, and the Sunshine Coast form the Lower Mainland/Southwest economic region. Despite being the smallest economic region by land mass, the region is home to over 3 million people, making up more than 60% of the total provincial population, and provides employment to over 1.8 million workers.

The Lower Mainland offers diverse economic opportunities across a variety of industry sectors within the urban centres. Key sectors include Aerospace, Artificial Intelligence, Food & Beverage, Digital Media & Entertainment, and Transshipment. This region has a established a reputation as a thriving economic hub with many regional advantages located in the area.

This includes the Port of Vancouver, an integral part of the global supply chain, contributing greatly as Canada's largest shipping port; the agglomeration of Film, Television, and Visual Effects studios often sought out by international production companies; as well as the abundance of natural environments that attract companies focused on green and clean-tech innovations and in providing recreational opportunities to residents and visitors alike.

**Figure 8: Map of Economic Regions in British Columbia**



Source: Province of British Columbia

As Canada and British Columbia continue to be a destination of choice for both international and interprovincial migrants, economic activity under population growth pressures is likely to saturate the Metro Vancouver land base and spill over into other economic regions across the Lower Mainland and the rest of Southwestern BC. The B.C. Labour Market Outlook estimated 654,560 job openings in the Mainland/Southwest region between 2022 and 2023, 255,590 (39%) of which were new job openings<sup>7</sup>. These growth pressures, along with shifting employment trends, are prompting local and regional governments to focus on improving and intensifying infrastructure to support the anticipated level of economic activity.

## 2.6 First Nations Communities

The Lower Mainland is home to 45 First Nations communities, many of whom are taking a more active role in the development of their own local economies, presenting emerging opportunities for economic collaboration and partnership. The District of North Vancouver is located on the unceded traditional and ancestral lands of the səliłwətał (Tsleil-Waututh), Skwxwú7mesh Úxwumixw (Squamish), and xʷməθkʷəyəm (Musqueam) of the Coast Salish peoples. The səliłwətał and Skwxwú7mesh Úxwumixw each have reserve lands located within the District boundaries; the səliłwətał (Burrard Inlet 3) and Ch'ich'əxwí7kw (Seymour Creek 2), respectively.

Representatives of the səliłwətał and Skwxwú7mesh Úxwumixw First Nation governments have participated in the development of the OCP through the District's vision for reconciliation and building a strong, collaborative partnership with the Indigenous Peoples in the community. These communities have taken an active role in advocating for economic reconciliation as well, having initiated numerous initiatives in recent years that seek to develop their lands with the goal of generating sustainable sources of economic revenue for their communities. It is likely that these initiatives will create growth opportunities that will attract many new residents and employment opportunities to the North Shore. Given the proximity of these lands to the District's own employment clusters, these initiatives represent a valuable opportunity for potential coordination between neighbours in the spirit of economic cooperation and reconciliation.

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<sup>7</sup> WorkBC, 2023. <https://www.workbc.ca/region-profile/mainlandsouthwest#view-full-profile>

## 3.0 TREND ANALYSIS

### 3.1 A Growing and Ageing Population

Demographic trends are a critical input to understanding the demand for services and the changing labour force over time. According to Statistics Canada, the population of the District increased by 7.1% over the last 20 years. This lagged the rate of growth in region, which grew by 33% over the same period.

Perhaps most telling is the composition of this growth. As shown in Table 8, the working aged population (15-64) remained nearly flat over this period, while the total number of children aged (0-14) declined by 9.4%. In fact, nearly all the net growth experienced by the District's local population was the result of an increase in residents aged 65 and older.

**Table 8: Comparison of Census Population and Age Group Growth Percentages, 2001-2021**

Year	North Vancouver DM	City of Vancouver	Vancouver CMA
2001	82,310	545,655	1,986,965
2006	82,562	578,041	2,116,581
2011	84,412	603,502	2,313,328
2016	85,649	631,486	2,463,431
2021	88,168	662,248	2,642,825
Demographic Change (2001-2021)			
Growth % (0-14)	-9.4%	-2.5%	7.7%
Growth % (15-64)	0.6%	18.9%	29.3%
Growth % (65+)	71.1%	60.3%	90.0%
<b>Total Overall Growth %</b>	<b>7.1%</b>	<b>21.4%</b>	<b>33.0%</b>

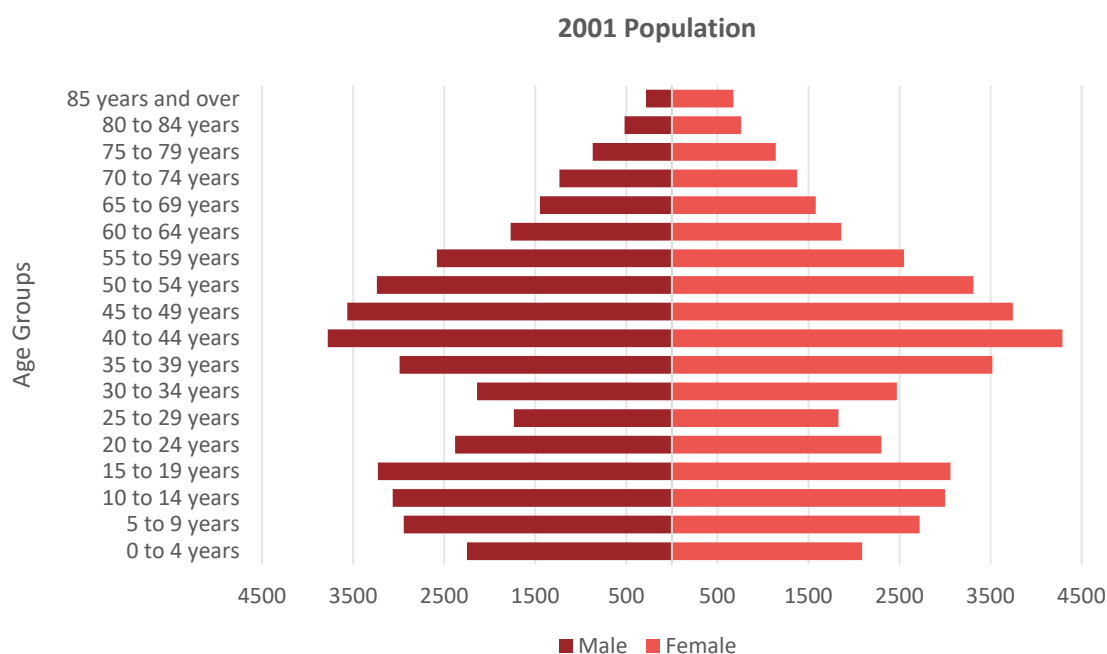
Source: Statistics Canada.

While the trend of an ageing population is not unique to the District, the limited growth of local working aged residents is particularly pronounced. Should new working aged individuals and families not be able to move to the community over time, this may result in a local labour force imbalance that could stifle economic growth opportunities or require a significantly increased rate of in-commuting.

The following population pyramids in Figure 9 illustrate the demographic changes of the District's population over the past two decades. From 2001 to 2011, people in the predominant portion of the population pyramid were in the 30 to 60 age range. This group represents a significant portion of the local working aged population. In the following years, this predominant portion has shifted upwards into the 35 to 65 and 40 to 70 age groups in 2021, suggesting that most of DNV residents are aging in place. However, this also means this working aged cohort is beginning to approach retirement age, potentially resulting in job vacancies to come.

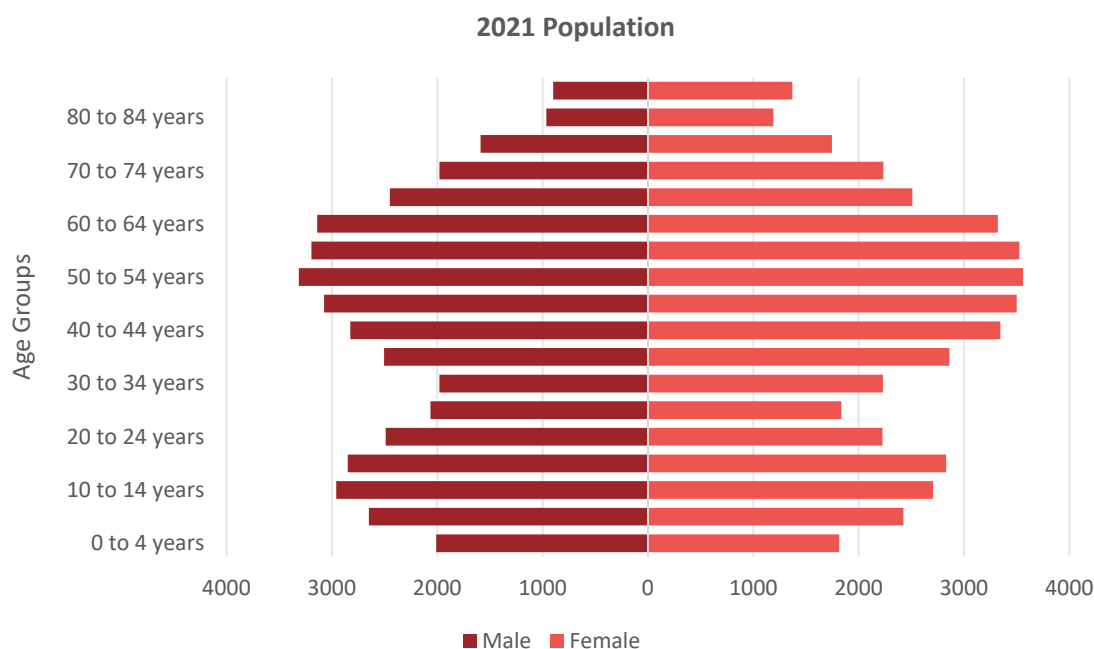
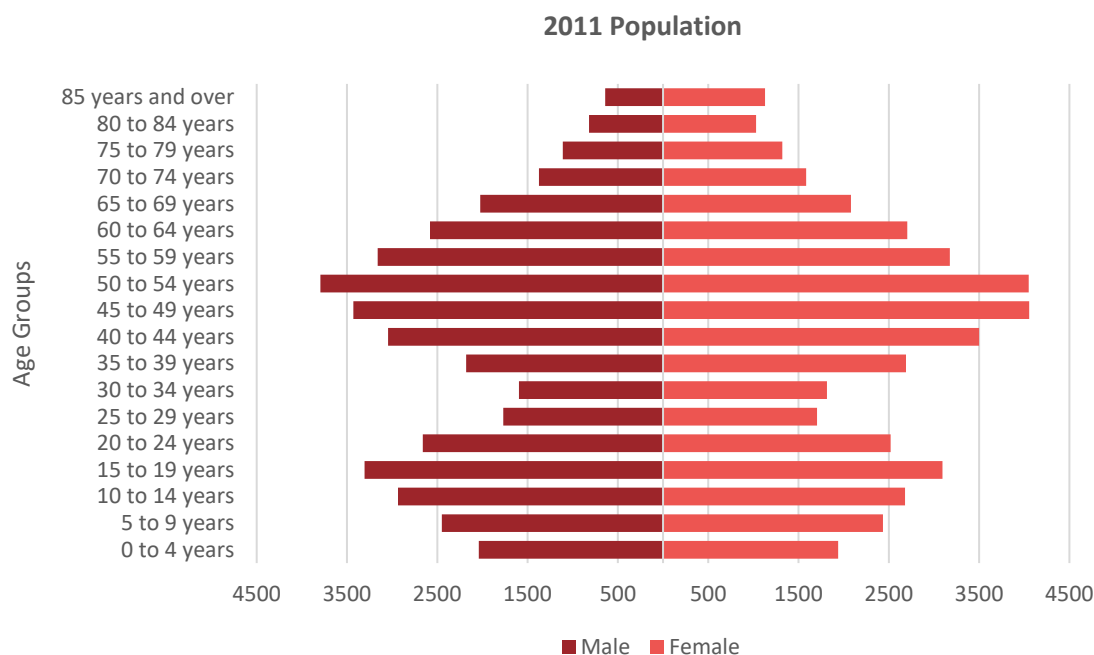
Youth and young adults aged 15 to 35 represent emerging drivers of the economy. However, the graphs demonstrate that this cohort decreased in size over time, resulting in a widening gap between the younger and older portions of the local labour force. Both the ageing population and limited growth of young people could challenge the rate of local economic growth as older members of the community continue to age out of the workforce with fewer local residents to replace them.

**Figure 9: Population by 5-year Age Group, District of North Vancouver, 2001, 2011, & 2021**





**Figure 9: Population by 5-year Age Group, District of North Vancouver, 2001, 2011, & 2021** *(Continued)*



Source: Statistics Canada.

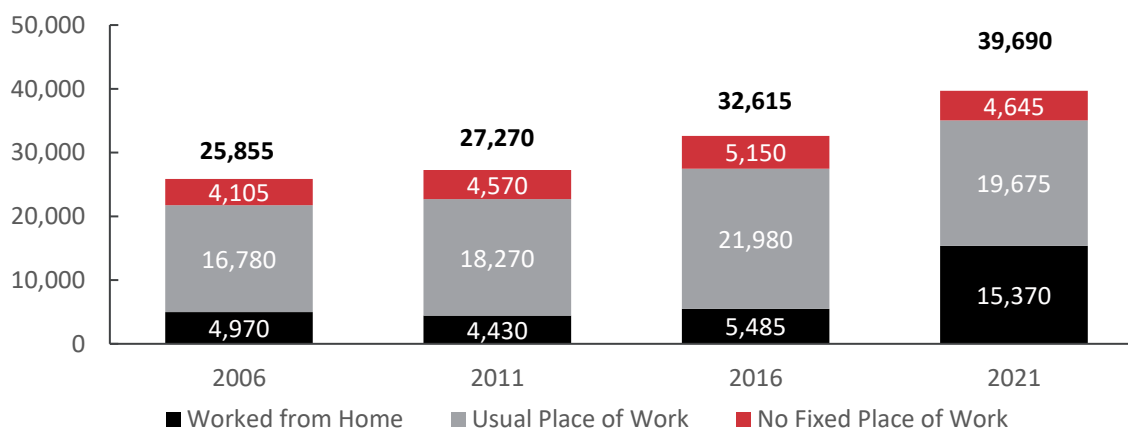
## 3.2 Employment Growth Trends

### 3.2.1 Employment Trends (2006-2021)

The number of jobs located in the District of North Vancouver increased steadily between 2006 and 2016, growing by 6,760 to a total of 32,615<sup>8</sup>. This change represented significant progress towards the OCP's goal in accommodating over 36,000 jobs by 2030, with Usual Place of Work employment representing the most significant portion of this growth.

However, this rate of growth paled compared to the increase experienced in the five years between 2016 and 2021, when the District employment count increased by more than 7,000 to a total of 39,690 jobs. This figure far surpasses the OCP target, but perhaps not in the form it was originally intended. Effectively, this growth occurred through Work From Home (WFH) employment, which increased by nearly 10,000 in 2021, a total growth of 180%. At the same time, employment reporting to a Usual Place of Work (UPOW) decreased by 10%. Given historical trends, the slight decrease of UPOW can be explained by the workplace restrictions implemented during the pandemic. The District's economic profile from 2006 to 2021 by Place of Work is summarized in Figure 10 below.

**Figure 10: Employment Profile by Place of Work, District of North Vancouver, 2006-2021**



Source: Statistics Canada.

<sup>8</sup> This jobs figure accounts for individuals aged 15 and over who either report that their primary form of employment by Usual Place of Work is located within the municipal boundaries of the District of North Vancouver, in addition to DNV residents who report either Working from Home or those with No Fixed Place of Work (e.g. jobs that do not have a permanent workplace location and or may report to a different location or job site depending on the day and activity). Note that these figures vary from historic counts presented in other reports, including the OCP Review White Paper on Economy and Employment Lands, due to revised data being produced by Statistics Canada.

The ratio of jobs to population is another key statistic which indicates the rate of local economic activity. This can be tracked in two ways – either jobs to total population, which is a standard historically tracked by the District, or jobs to working aged population (aged 15 to 64), which provides a more indicative figure relative to the local labour force. These figures are shown in Table 9 below.

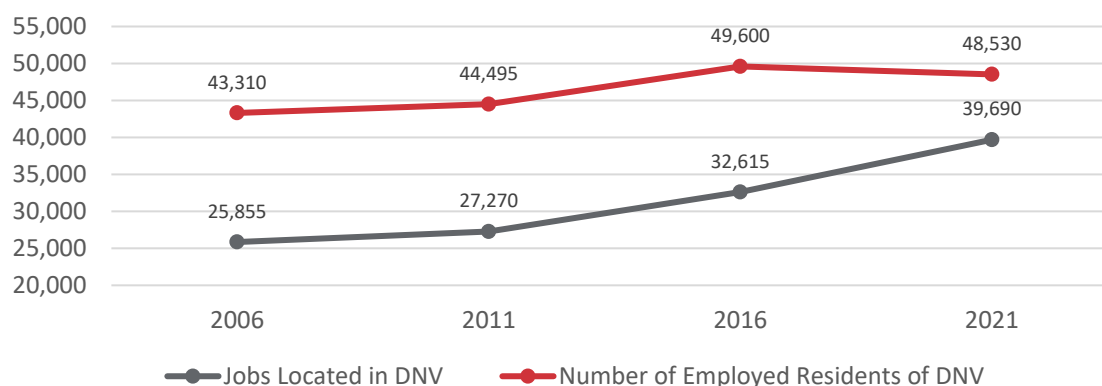
**Table 9: Employment and Jobs in DNV, 2006-2021**

Census Data	2006	2011	2016	2021
Jobs to DNV Population	0.31	0.32	0.38	0.45
Jobs to Employed Residents	0.59	0.61	0.66	0.82
DNV Residents Working In the District (excludes WFH)	6,360	7,175	7,800	7,600

Source: Statistics Canada.

Prior to the pandemic the number of jobs located in the DNV and the number of employed DNV residents had generally increased in parallel to each other, narrowing slightly between 2006 and 2016 as shown in Figure 11 below. However, the gap between these figures narrowed considerably in 2021, the result of both pandemic related work disruptions and a declining share of working aged residents.

**Figure 11: Change in Jobs Located in DNV and Number of Employed Residents, 2006-2021**



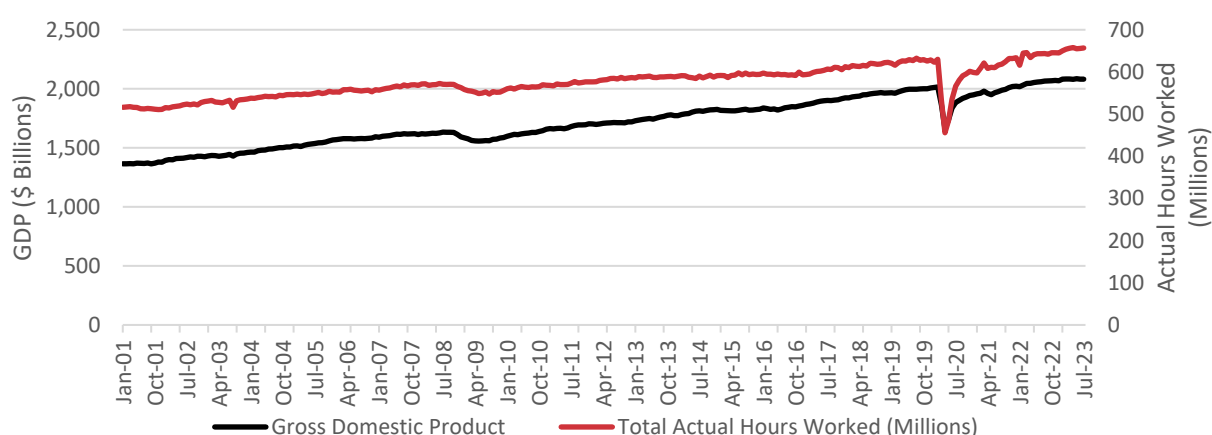
Source: Statistics Canada.

Another objective of the OCP is to increase the number of residents that work in the District. As shown in Table 9, this figure had been steadily increasing prior to the pandemic, but declined by 200 jobs (2.5%) between 2016 and 2021. Considering this figure only accounts for jobs with a Usual Place of Work, which declined by 10% overall during this time, the overall trend indicates the District has continued to make strides towards this goal in the context of broader pandemic related disruptions.

### 3.2.2 Significant Shocks and Potential Long-Term Shifts Resulting from COVID-19

Three years down the road, the COVID-19 pandemic has had lasting social and economic impacts that are only recently returning to pre-pandemic levels. The pandemic brought Canada the deepest and fastest recession since such data started being tracked, recording a loss in Gross Domestic Product (GDP) of 13% in the first half of 2020 alongside activity levels three times lower than the 2008-2009 recession. Figure 12 below illustrates the change in Total GDP and Actual Hours of Work over the past two decades within all industries at a national level.

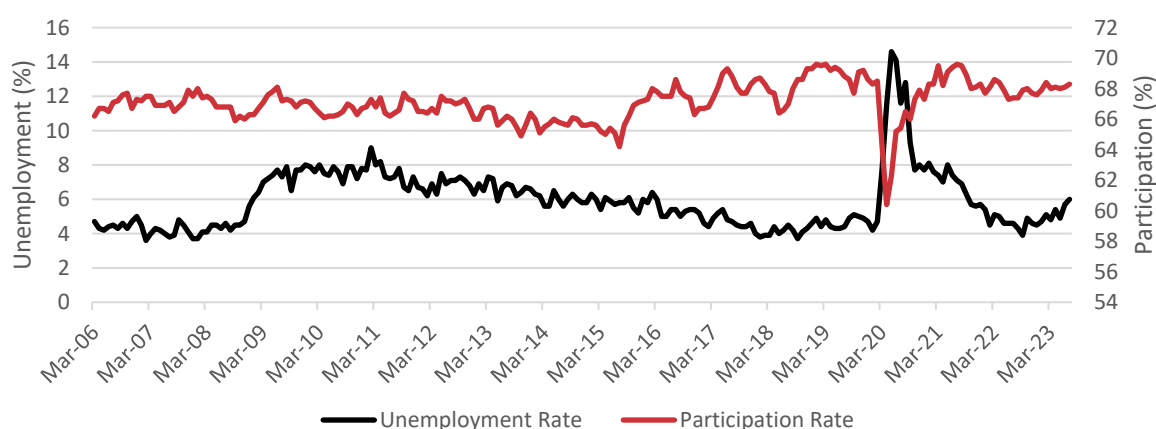
**Figure 12: Change in Total GDP and Total Actual Hours Worked, All Industries, Canada, 2001-2021**



Source: Statistics Canada.

Figure 13 illustrates the impact of the pandemic on labour participation and employment at a regional level.

**Figure 13: Labour Force Unemployment and Participation Rate, Vancouver CMA, 2006-2021**

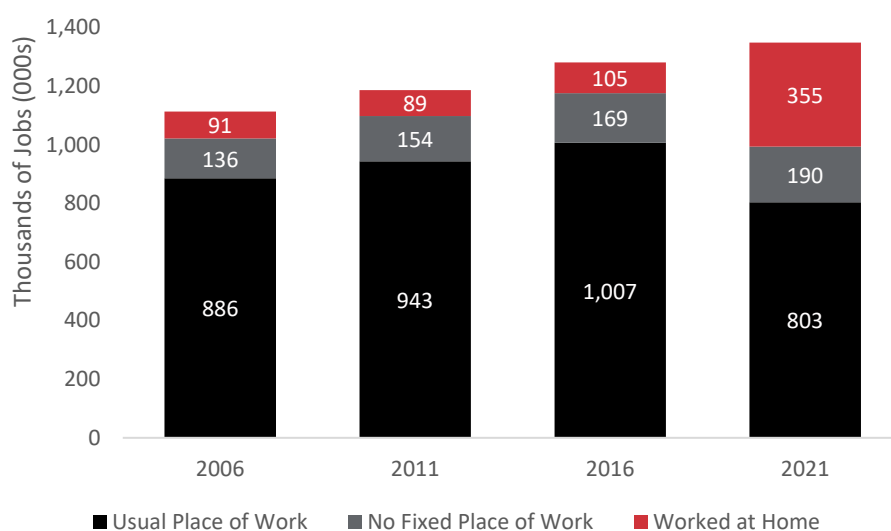


Source: Statistics Canada.

The unemployment rate across the Vancouver CMA in black, peaked at nearly 15% in May 2020. The last time a steep spike was seen in rates was in the latter half of 2008 heading into 2009, doubling from 4% to 8%. The labour force participation rate, depicted by the red line, experienced a sharp decrease at the same time, affected by layoffs and business closures through the worst of the pandemic-related lockdowns. Since March 2021, employment activity has nearly returned to pre-pandemic levels, followed by participation rates in March 2022.

Despite employment in 2021 rebounding from the shock to the labour force in 2020, the lingering impacts on where and how people are able to work was considerable. In 2016, Work From Home employment only accounted for 4% of all Canadian jobs. In 2021, it accounted for 32% of jobs nationally. This shift was slightly less pronounced in the Metro Vancouver region, with 26% of workers reporting Working From Home, over triple the 8% share reported in 2016. Figure 14 illustrates the scope of this change and its deviation from the trend at the Metro Vancouver level from 2006 to 2021.

**Figure 14: Employment Profile by Place of Work, Vancouver CMA, 2006-2021**



Source: Statistics Canada.

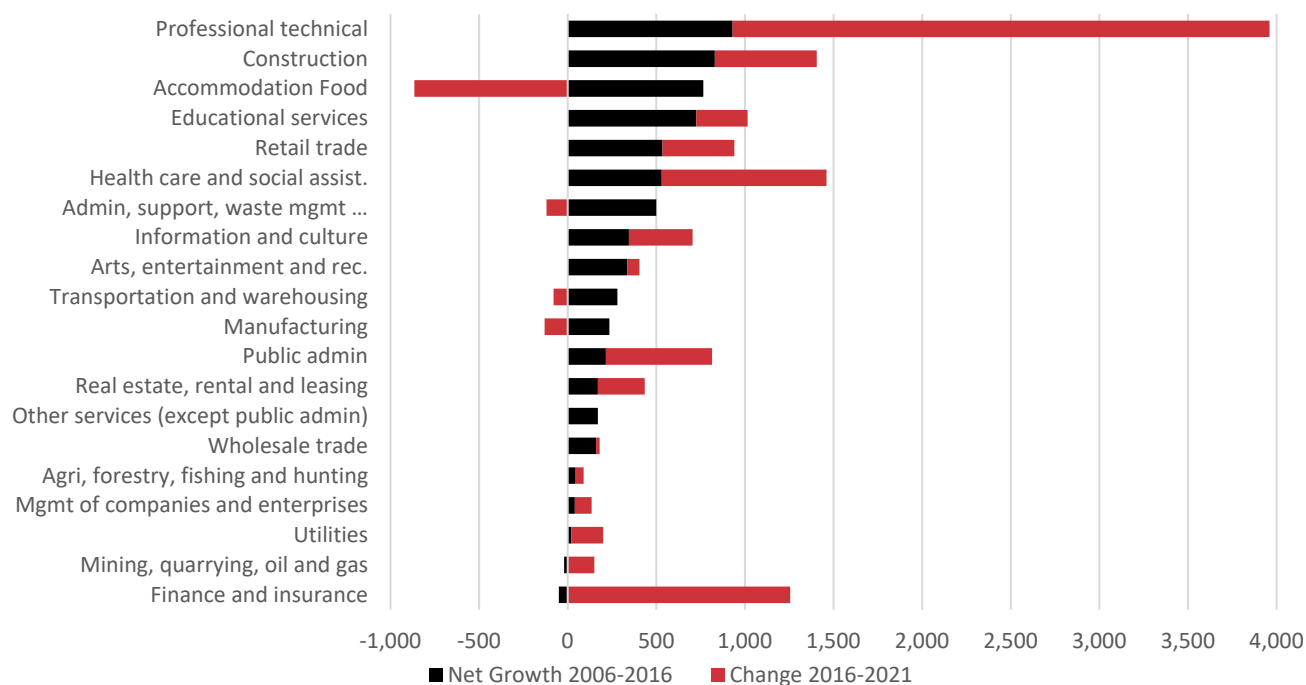
### 3.2.3 Local Employment Sector Shifts Pre- & Post-Pandemic

Many of these same trends were experienced at the local level, though the scale and severity of the pandemic related impacts often varied by location and the industry in question. In the case of the District of North Vancouver, multiple factors affected the pace and composition of employment growth before and through the pandemic including, but not limited to:

- Changing local demographics and spending patterns creating demand for different services.
- A limited land supply for employment purposes and support industrial growth.
- Competition for space within designated employment lands putting upward pressure on rents.
- Rising property assessments, leading to additional tax cost being passed on from owners to operators via triple net leases.
- A lack of affordable housing and transportation infrastructure creating further constraints on economic operations and expansion.

Evidence of these factors is visible when observing the differences in employment change amongst different sectors between 2006 and 2016, as shown by the net growth represented by the black bars in Figure 15 below. The top sectors of growth were largely Commercial sectors followed by Institutional and Industrial sectors. While certain sectors outperformed others, the general trend was towards steady growth across most areas of the economy in these pre-pandemic years.

**Figure 15: Employment Change by Sector, District of North Vancouver, 2006-2016 & 2021**



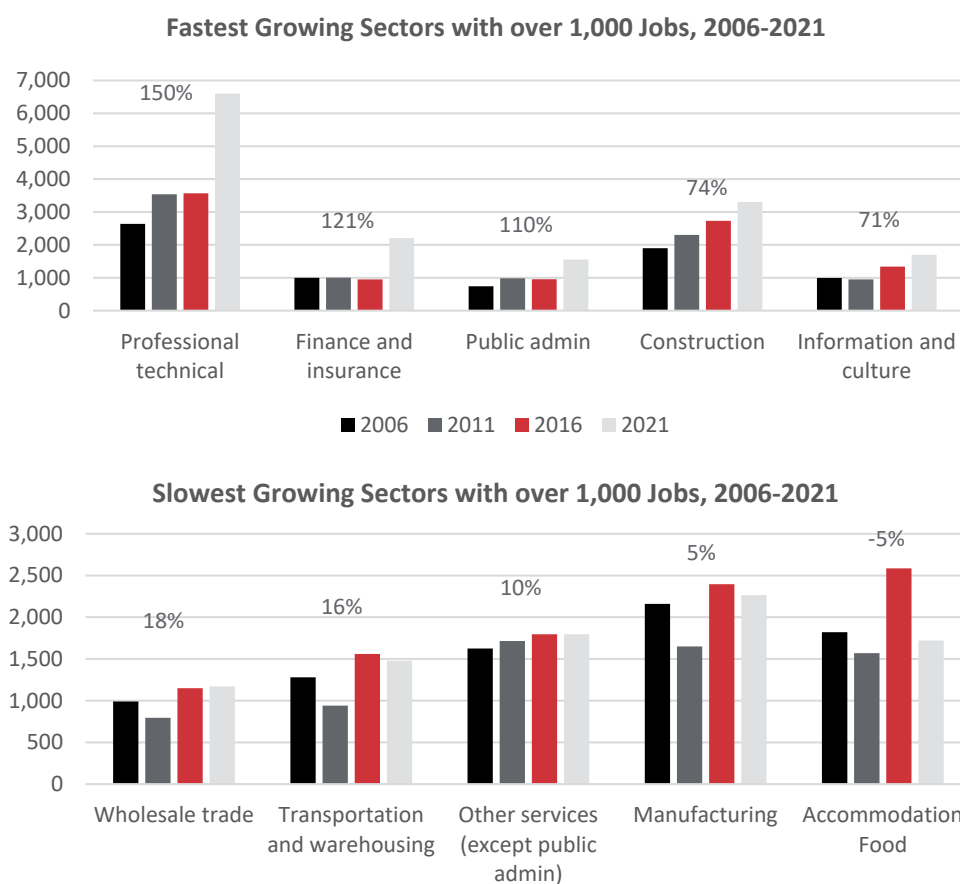
Source: Statistics Canada.

This trend was upended by considerable volatility in the time between 2016 and 2021, as shown by the red bars in Figure 15. Jobs in the Professional Technical, Finance and Insurance, Public Administration, and Information sectors account for some of the most significant jumps in employment, representing jobs which

were best positioned to make the shift to Work From Home. This shift towards Work From Home also benefited many other sectors in more modest ways, though sectors that could not make the shift, namely Accommodation and Food, experienced considerable losses as staff were furloughed. That said, other sectors, including Construction and Retail, demonstrated a degree of resiliency and adaptation, able to grow their workforce despite the ongoing disruptions.

To look beyond the short-term impacts, Figure 16 provides a breakdown of the five fastest and five slowest growing sectors between 2006 and 2021 and how these sectors changed over the past two decades. Observing the change in employment for each helps to provide a better idea of the long-term trajectory of change, along with the factors that influence their growth.

**Figure 16: Fastest and Slowest Growing Sectors with over 1,000 Jobs, DNV, 2006-2021**



Source: Statistics Canada.

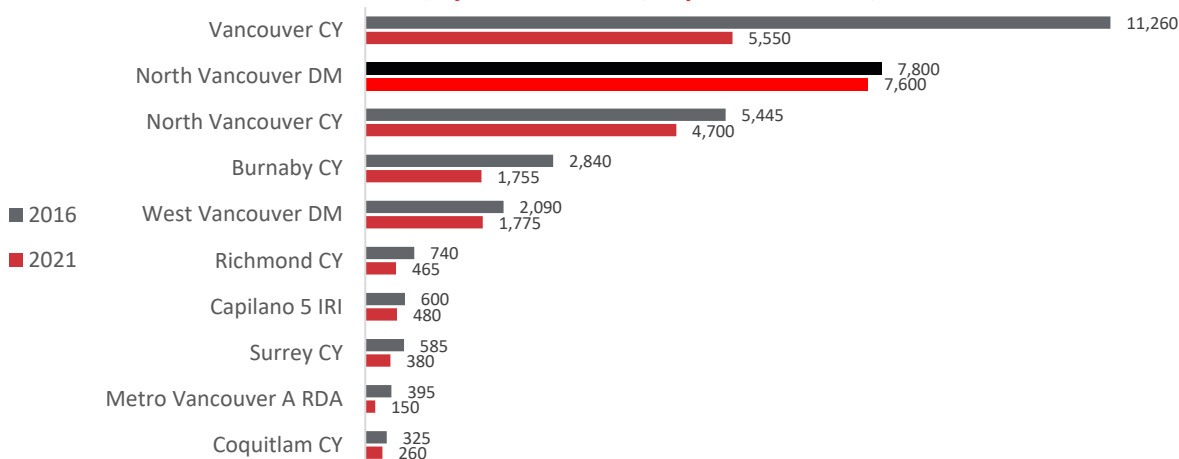
For example, job counts in Professional Technical, Finance and Insurance, Public Administration, and Information and Culture all spiked in 2021, but had otherwise experienced relatively modest growth in the preceding period, showing just how much of their recent gains were likely a result of the pandemic rather than long-term trends. Of the fastest growing sectors over this period, only Construction demonstrated a steady increase in activity throughout each Census period, suggesting activity in this category is more tied to overall regional growth and less to locational shifts.

Conversely, the five slowest growing sectors each demonstrated considerable growth in the years between 2006 and 2016. It is also worth noting that many of these sectors, including Wholesale Trade, Transportation and Warehousing, Manufacturing and Accommodation and Food demonstrate an increased sensitivity to macro-level market factors, as each was similarly impacted by the 2008-09 recession, as demonstrated by the reduced employment figures in 2011. These losses subsequently rebounded in the following period, suggesting a degree of cyclicity to their growth prospects. While lingering economic headwinds may slow the recovery of these sectors over the near-term, their long-term outlook remains positive overall.

### 3.2.4 Commuting Patterns

As a suburb of the regional center, the District of North Vancouver has historically experienced a net-outflow of commuters. While this remained the case in 2021, the pandemic resulted in a significant narrowing of the gap between in and out commuting to and from the District, as shown in Figure 17 below.

**Figure 17: Where DNV Residents Work, by Place of Work, Top 10 Commutes, 2016 & 2021**



Source: Statistics Canada.

Excluding the residents who reported Working From Home and those with No Fixed Place of Work, 24,070 residents of the District reported to a Usual Place of Work for their jobs in 2021. This is significantly down from the 33,230 residents that commuted to work in 2016, representing a decline of 9,160, or 28%.

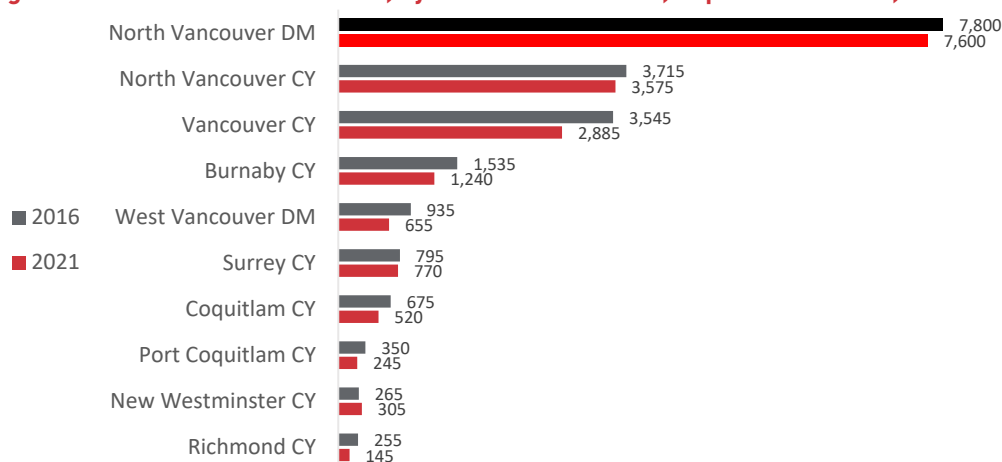


Prior to the pandemic, the City of Vancouver was the most common destination (34%) for District residents commuting to work. Residents that worked at jobs located within the District accounted for 23% of commutes, followed by the City of North Vancouver (16%). Including West Vancouver and the local First Nations reserves, trips to a place of work on the North Shore accounted for 48% of resident commutes in 2016.

This pattern shifted significantly in 2021, with trips to the City of Vancouver falling by over half as more and more residents worked from home. At the same time, commutes to jobs based in the District fell only slightly to 7,600, now accounting for nearly one-third of trips made for work by residents.

On the other hand, the number of commutes made to jobs located in the District fell somewhat more modestly from 21,650 in 2016 to 19,560, representing a loss of 2,090 jobs, or just under 10%. As shown in Figure 18, these jobs were most likely to be filled by residents of the District in both 2016 (36%) and 2021 (39%). This means that the majority of regular place of work jobs in DNV are filled by people who commute from their place of residence outside the District municipality, with the highest number of commuters coming from the Cities of North Vancouver, Vancouver, and Burnaby.

**Figure 18: Who Works in the DNV, by Place of Residence, Top 10 Commutes, 2016 & 2021**



Source: Statistics Canada.

In 2016, DNV experienced a net out-commute of 11,580 jobs. By 2021, the balance remained towards the out-commute, but the gap had narrowed to only 4,510. While this is promising in terms of attracting employment, it is important to recognize that out-commuting is likely to increase once more as more workers are called back to the office, though it is unlikely it will return entirely to pre-pandemic rates.

## 4.0 EMPLOYMENT LANDS ANALYSIS

The Employment Lands Analysis categorizes employment based on their activities and emerging trends to split the regional jobs into three high-level Employment Land Use Class:

- Industrial
- Commercial
- Institutional

These three categories mirror the general employment land use designations identified in the District of North Vancouver Official Community Plan. Sections of the analysis also consider the distinction between different types of Commercial uses, specifically Retail and Office given the variety in nature of work across industry sectors that fall under the general branch of Commercial services.

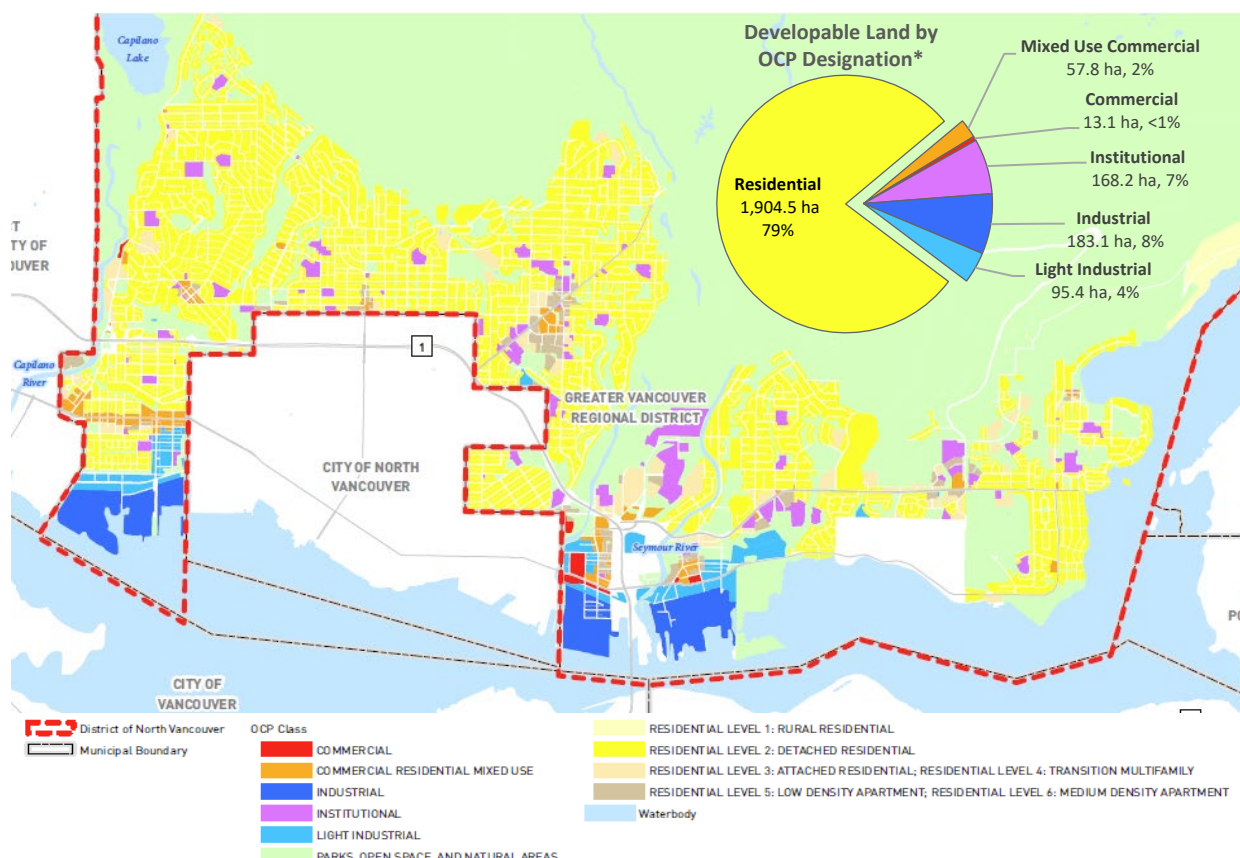
### 4.1 Employment Land Supply in the District

#### 4.1.1 Employment Land Inventory

When it comes to fostering economic growth and vitality, there are a few levers in a municipality's control, key amongst which is the provision and management of strategically located and serviced lands to accommodate business activities. The District of North Vancouver directs and accommodates for anticipated growth and development through policies that regulate land uses for community and employment lands as outlined in the OCP.

The total area within the borders of the District of North Vancouver totals over 16,000 hectares. However, only a small portion of that land is considered developable. Excluding undevelopable lands such as Parks & Open Space, First Nations Reserves, and Right of Ways, the total net developable urban land supply amounts to only 2,422.1 ha.

**Figure 19: Official Community Plan Land Use Designations, District of North Vancouver**

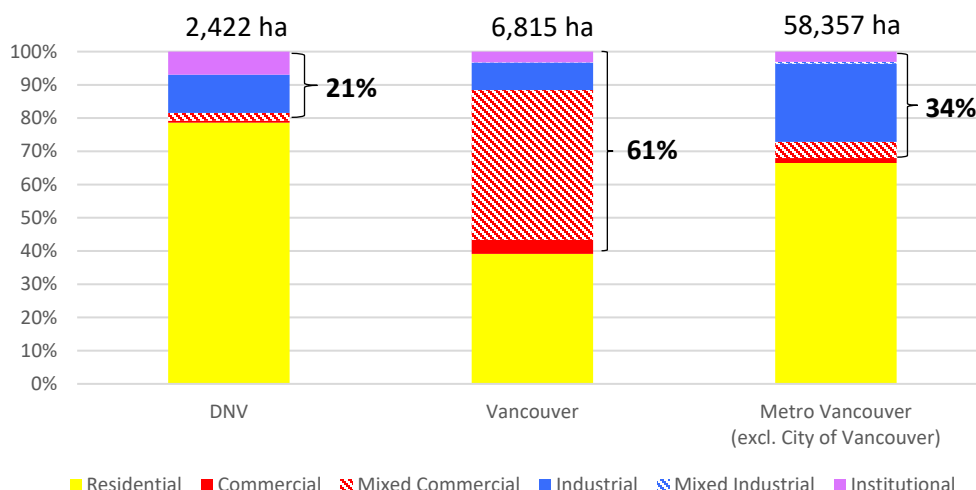


Source: District of North Vancouver – Note: \*Excludes Parks, Open Space and Natural Areas, Roadways and other Right of Ways.

As shown in Figure 19, only 21% of the developable land base is currently allocated for employment uses with Industrial (12%) making up the bulk of the land use, followed by Institutional uses (7%) and Commercial uses (3%).

As shown in Figure 20 on the following page, this is considerably less than most other municipalities found in the Metro Vancouver region, particularly when it comes to the amount of land designated for Commercial and Industrial uses. The City of Vancouver is shown separately from the rest of Metro Vancouver on account of both its unique status as the central city in the broader metropolitan region, along with the distinct implications of the recently introduced Vancouver Plan, which now potentially permits Mixed Residential and Commercial uses across broad swathes (45%) of the community.

**Figure 20: Employment Land by OCP Permission, District of North Vancouver, 2023**



Source: B&A & Urban Systems, based on current in force Official Community Plans.

With a finite supply of developable land within its municipal borders, there are few realistic opportunities for the District to catch up to its neighbours by expanding its employment land supply. At the same time, there are few opportunities for redevelopment within the lands it has designated. A high-level scan of the District's employment lands utilizing satellite imagery and a review of development applications indicates that almost all these lands have either already been developed or are in the process of being so.

This shortage is further exacerbated by the loss of zoned Industrial lands, which decreased by nearly 4.5 ha since 2011, as catalogued in Table 10 below.

**Table 10: Industrial Zoned Land Change in Hectares, District of North Vancouver, 2011 to 2023**

Period	2011 to 2016	2016 to 2021	2021 to Oct 2023	Net Change
Net Change	-3.42 ha	-1.27 ha	0.22 ha	-4.47 ha

Source: District of North Vancouver

With its employment land supply largely built out, the accommodation of future economic and employment growth will most likely need to be achieved through the active redevelopment and intensification of existing employment lands.

### 4.1.2 Employment Space Inventory

To understand the prospects for redevelopment and intensification, we must first understand how much built space exists across the employment land supply and how it is being utilized. While exact floor area data is not available at the sub-municipal level, detailed footprint shapefiles available in the District of North Vancouver's Open Data catalogue provides a sufficient level of information to estimate the total supply of space spread out across the municipality. This data includes the area of the footprint of the building, the number of floors, and the building class, as tracked by the District.

In terms of the building class, we are primarily interested in the Commercial, Industrial, and Institutional classifications, along with the Mixed-Use buildings (which we assume the ground floor to be used for Commercial space), and Auxiliary buildings (which are utility and other buildings that are primarily Industrial-adjacent in function). Utilizing this data, the total employment floor space by Land Use Class is summarized in the following table.

**Table 11: Estimated Employment Floor Space Supply by Land Use Class**

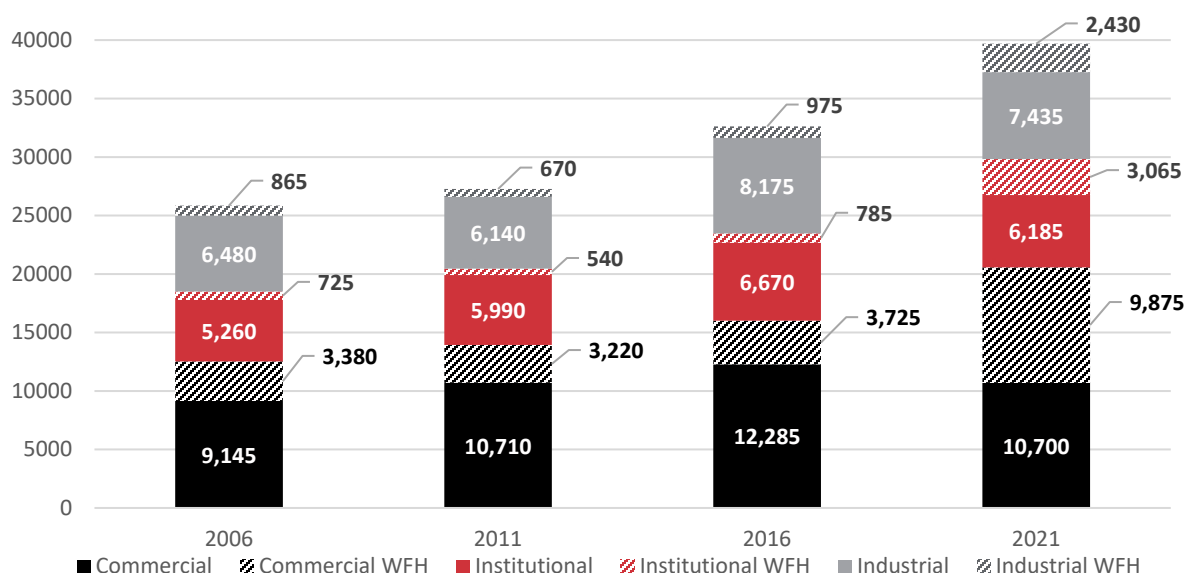
<b>Commercial</b> <i>(includes Commercial and Mixed-Use)</i>	<b>Institutional</b>	<b>Industrial</b> <i>(includes Industrial and Auxiliary)</i>
6,608,000 sq ft	3,820,000 sq ft	6,645,000 sq ft

Source: B&A & Urban Systems, based on data from District of North Vancouver

### 4.1.3 Estimated Employment by Land Use Class

The next step to understanding the utilization of space and its subsequent implications for future floor space demand is estimating the total amount of employment related to that space. To do this, estimates of employment by Land Use Class were developed based on detailed NAICS sub-sectors (3-digit codes) employment counts. As shown in Figure 21 on the following page, these estimates separate out Work From Home employment from each category to approximate the number of jobs that either report to (Usual Place of Work) or induce demand for (No Fixed Place of Work) for physical employment space and land.

**Figure 21: Total Employment Location by Land Use Class, District of North Vancouver, 2006-2021**



Source: Statistics Canada

The resulting time series is informative, both in terms of the general increase in employment land-related employment across all categories between 2006 and 2016, and the differing shift towards WFH that occurred between categories in 2021. Key findings are as follows:

- While Commercial land-based employment experienced the most significant decline between 2016 and 2021 (-1,585 jobs), both Industrial (-740 jobs) and Institutional (-485 jobs) also declined. These declines were more than offset by increased to Work From Home employment in each category, with Commercial WFH growing the most in absolute terms (+6,150 jobs).
- In the 10 years between 2006 and 2016, there was a steady increase in employment land-based employment in each of the three Land Use Classes, indicating a trend towards continued land and space need prior to the disruptions caused by the pandemic.
- The relative share of Work From Home jobs in each Land Use Class was relatively stable, and even declined modestly between 2006 and 2016, as shown in Table 12 on the following page. While the prevalence of WFH is not likely to fully return to these historic rates in the future, analysis suggests that the overall share of WFH will decline back towards the historic mean as more businesses begin to require workers to report back to the workplace through both traditional and hybrid work arrangements.

**Table 12: Work From Home Share by Land Use Class, District of North Vancouver, 2006-2021**

Land Use Class	2006	2011	2016	2021
Commercial	27%	23%	23%	48%
Institutional	12%	8%	11%	33%
Industrial	12%	10%	11%	25%
<b>Total</b>	<b>19%</b>	<b>16%</b>	<b>17%</b>	<b>39%</b>

Source: Statistics Canada

#### 4.1.4 Estimated Floor Space Per Worker

Utilizing the estimated floor space inventory and employment by Land Use Class, we can estimate a general amount of built space required per worker. Recognizing that there is considerable variance between individual businesses based on their respective buildings, number of workers, and the nature of their activity, these Floor Space per Worker (FSW) figures act as a general baseline of the average space needed for employees in each Land Use Class.

This figure is calculated against jobs tied to actual employment space, so Work From Home employment is excluded from the calculation. Due to the significant shifts towards WFH in the 2021 Census and recognizing that FSW figures can change over time due to a myriad of factors, we have calculated the FSW for both 2016 and 2021 employment figures against the current floor space inventory<sup>9</sup>. The results of this calculation are summarized in Table 13.

**Table 13: Floor Space Per Worker Estimates, District of North Vancouver, 2016 & 2021**

Land Use Class	Floor Space (sq ft)	2016		2021		Typical Range (sq ft)
		Jobs	FSW (sq ft)	Jobs	FSW (sq ft)	
Commercial	6,608,000	12,285	538	10,700	618	350-550
Institutional	3,820,000	6,670	573	6,185	618	400-600
Industrial	6,645,000	8,175	816	7,435	894	600-1,000
<b>Total</b>	<b>17,073,000</b>	<b>27,130</b>	<b>629</b>	<b>24,320</b>	<b>702</b>	

Source: B&A and Urban Systems, using data from Statistics Canada and District of North Vancouver.

<sup>9</sup> The building footprint data used to estimate the total employment space inventory did not include time series information, so it does not account for space that was added or demolished since 2016. This is a recognized limitation of the data, though a review of historic development data and building permit data suggests the overall change in net space added over this time was minimal and is not considered to have had a significant impact on the estimate.

When comparing these calculated FSWs against those often observed in other markets, the 2016 figures appear to fall within the typical range for each class. The 2021 figures fall just outside of the range expected for Commercial and Institutional space, which is to be expected given the nature of the data and the impact of the pandemic at the time.

## 4.2 Trends Affecting Local Employment Lands

To inform assumptions related to the future growth prospects for the District, along with the employment and space utilization trends in each of the respective Employment Land Classes, a high-level analysis of market trends was conducted. This covered both local and regional factors that could impact the trajectory of employment growth and associated land and floorspace needs. The key takeaways are summarised as follows:

### 4.2.1 Industrial Land Use

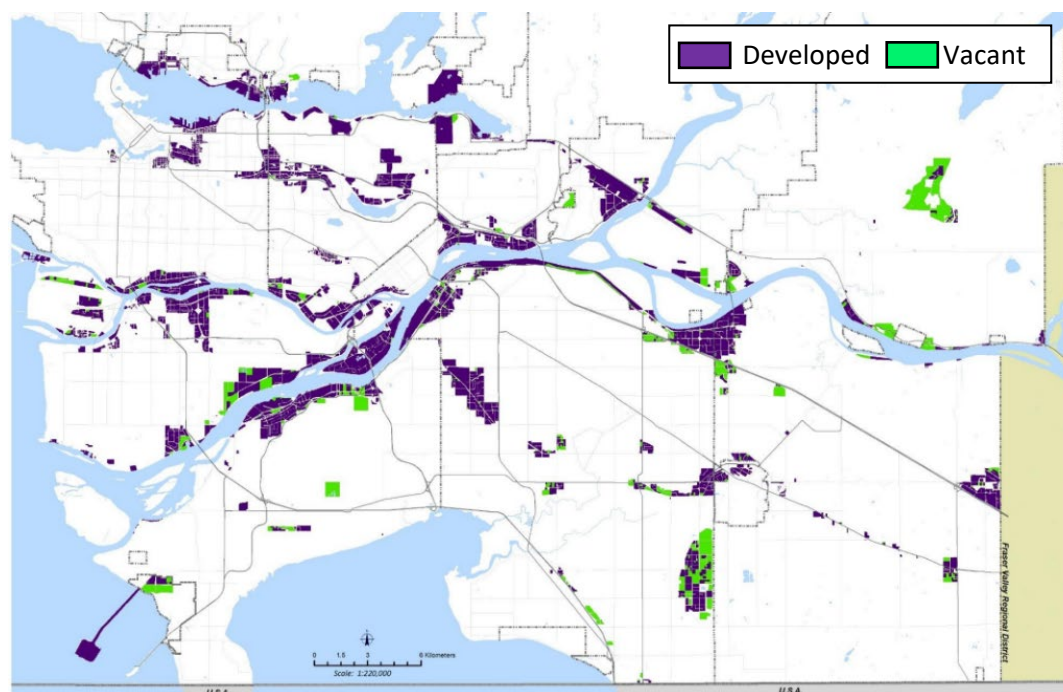
- Across the region, industrial lands are expected to reach capacity in the next twenty to thirty years. An already constrained land base facing growth pressures is leading to increased competition among the existing vacant and underutilized industrial lands, driving up rents and land prices.
- A recently updated inventory of Industrial lands across Metro Vancouver in mid-2020<sup>10</sup> identified 11,502 hectares of land as Industrial, of which only 2,115 hectares (18%) were considered vacant or occupied by non-industrial uses. In the five years prior to the study, it is estimated that 484 hectares were absorbed on a net basis, suggesting the remaining supply will be quickly absorbed if current trends persist. A map of the Metro Vancouver Industrial Lands Inventory is provided for context in Figure 22 on the following page.

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<sup>10</sup> Metro Vancouver, 2020. 2020 Industrial Lands Inventory Technical Report. <https://metrovancover.org/services/regional-planning/Documents/metro-vancouver-2020-industrial-lands-inventory-technical-report.pdf>



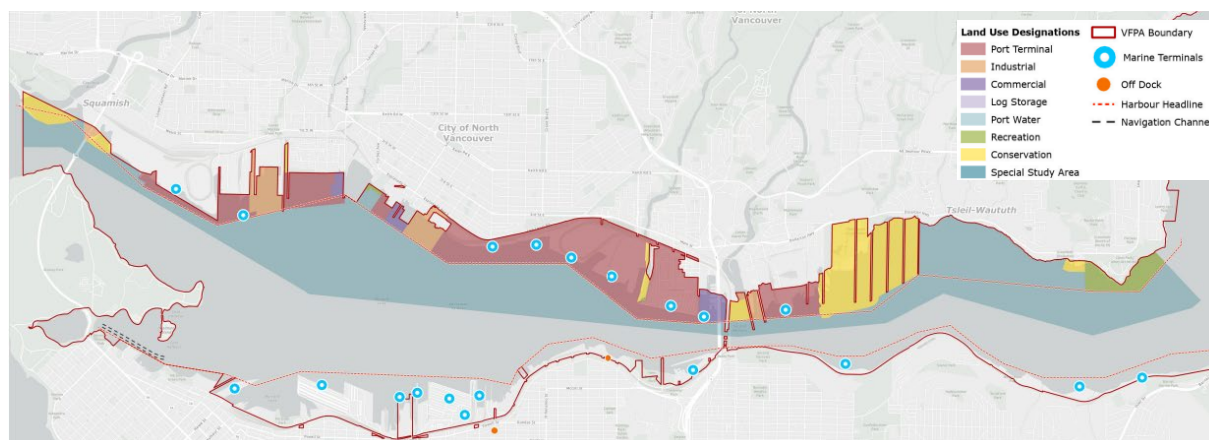
**Figure 22: Metro Vancouver Industrial Lands Inventory, Occupied and Vacant Lands, 2021**



Source: Metro Vancouver

- Industrial lands are the biggest employment land use by area in the District, making up more than half (52%) of the District's employment lands. As of October 2023, the industrial inventory in DNV has fallen to a vacancy rate of 1.4%, the lowest vacancy rate in comparison to other jurisdictions in the region but one of the highest net market rents at \$28.32 per square foot. This is only second to the City of Vancouver rates, indicating that the District's industrial lands are highly sought outside of the regional centre.
- Most of the industrial space located in the District can be found along the waterfront with light industrial and commercial adjacent to the core industrial clusters. A significant portion of these industrial spaces along the waterfront fall under the Federal authority of the Port of Vancouver (Figure 23 on the following page), limiting the District's jurisdiction over the use and intensity of these industrial spaces.
- As Canada's largest port, the Port of Vancouver plays a critical role in supporting the local and broader regional and national economies through its operations and job creation. While these lands may not be within the District's jurisdiction, the economic activity that occurs thereon generates economic spinoff to the surrounding area, including clustering and agglomeration benefits for the nearby industrial lands.

**Figure 23: Burrard Inlet North Shore Land Use Plan, Port of Vancouver, 2023**



Source: Port of Vancouver

- Traditionally accommodated by low-rise buildings with large floor plates, industrial lands have become increasingly difficult to develop in the District as much of the developable land is already built up and dependent on access to transport infrastructure ranging from rail, highways, and water. The District does include some of the last remaining undeveloped industrial-designated lands on the North Shore, located in the Maplewood area, totaling approximately 18 hectares based on the Metro Vancouver inventory. However, much of this land is already subject to development applications. Once built out, the District's industrial land supply will have been depleted, requiring future growth to be accommodated via intensification of existing sites.
- Until recently, this type of infill industrial redevelopment had been rare in the North American context due to significant construction cost and site requirements. However, industrial rents in the Metro Vancouver market have begun to reach a point where multi-storey industrial projects are approaching financial feasibility. While site and soil constraints will still be an issue, a recent study conducted on behalf of Metro Vancouver suggests that local municipalities may be able to encourage intensification in strategic locations through proactive zoning and land use policy amendments<sup>11</sup>.

<sup>11</sup> Colliers, 2021. Metro Vancouver Industrial Intensification Analysis. <https://metrovancover.org/services/regional-planning/Documents/industrial-intensification-analysis-study-2021.pdf>

#### 4.2.2 Commercial Land Use

The District of North Vancouver OCP Land Use Designations combines both Commercial Retail and Commercial Office under the broader Commercial land use. For the purposes of the report, Commercial Retail and Commercial Office employment spaces are considered separately given the differences of employment activities that occur in these spaces.

##### Commercial Office

- Nationally, the Canadian office market is experiencing a post-pandemic surge in vacancy rates that is expected to peak around 15% in 2024 according to 2023 Q3 Collier's National Market Snapshot<sup>12</sup>. Despite this increase in availability, rents remain at near record high levels in many markets across the country. However, the outlook for office demand varies considerably by sub-market.
- Historically, suburban office markets tended to experience higher vacancy rates than the downtown office market. This is largely because the market for large commercial office space was most often concentrated in specific regional nodes, with Downtown Vancouver being the Central Business District for many financial, tech, real estate, and other institutional players in the region. Prior to the pandemic, vacancy rates for both the downtown and suburban markets tended to move in parallel with one another through various market cycles, including the aftermath of the dot-com bubble in the early 2000's, the 2008-09 recession, and the rise of tech in 2015-16. However, this trend has inverted in the wake of the pandemic, with suburban office vacancies now as much as 500 basis points lower than the downtown market. These historic trends are illustrated in Figure 24 on the following page.
- CBRE cites that the initial change in vacancy patterns is due to the unique offerings suburban office space provides to both local and large format tenants. The pandemic resulted in changes to locational preference and commuting patterns, with existing office employers re-evaluating their space needs. In consideration of the changing relationship between physical offices and workers, suburban offices may also be preferred for reasons ranging from affordability of space to proximity to where many office workers live.

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<sup>12</sup> Colliers, 2023. <https://www.collierscanada.com/en-ca/research/national-market-snapshot-2023-q3>

**Figure 24: Regional Office Vacancy Rates, Metro Vancouver, 2023**



Source: CBRE Research, 2023 Q3

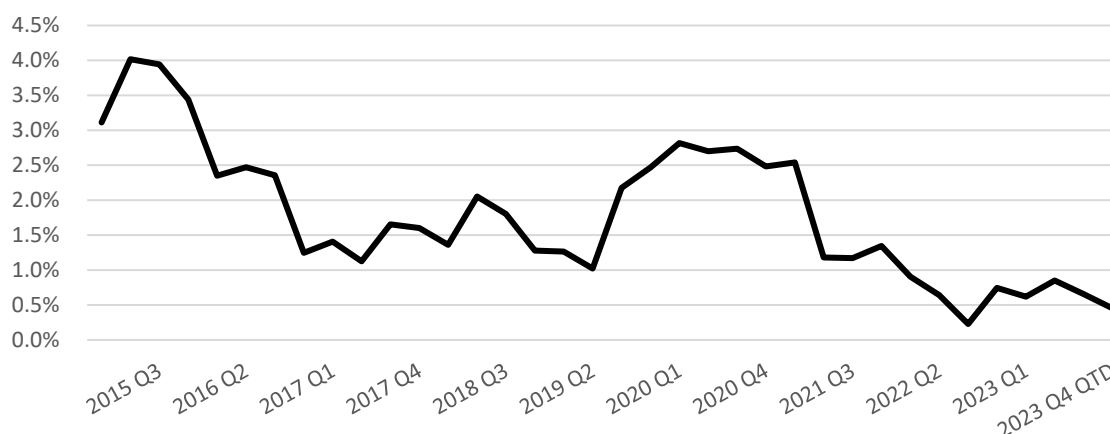
- As of October 2023, Commercial office space in the DNV totaled 839,000 square feet with a vacancy rate of only 3.2%, significantly lower than the vacancy rates tracked in the Downtown and many other parts of the Metro Vancouver market<sup>13</sup>. It is likely that the suburban nature of the local office space insulated DNV from the worst of pandemic related shocks to the office market on account of the size and population-focused nature of many of its tenants, along with the comparatively lower asking rents. However, the District's tight vacancy rates are putting upward pressure on affordability, with asking rents reaching \$36.85 in 2023 Q3 which is comparable to the asking rents of the office markets in Downtown Vancouver and along the Broadway Corridor.
- Prior to the pandemic, many office employers were experimenting with 4-day work weeks and other flexible forms of work, with productivity levels reportedly meeting the same or greater levels as 5-day work weeks. Post-pandemic, a considerable number of workplaces have maintained or are looking to implement a hybrid or remote workplace environment. This has resulted in a significant increase to residential spaces being a usual Place of Work and Live-Work dwelling units being in higher demand alongside a greater focus on work-life balance in the past few years. Consequently, this may play a part in how residential and mixed-use spaces are planned out at a building level. As companies reduced office space, coworking spaces have seen a rebound in interest from workers through inexpensive monthly memberships that provide access to amenities, social activities, and the possibility of working closer to home.

<sup>13</sup> CoStar Market Analytics, October 2023.

## Commercial Retail

- The rise of e-commerce is a global phenomenon that existed prior to the pandemic, though the shift in consumer behaviour towards digitalization most certainly accelerated during the pandemic. While the demand for certain retail functions has declined as a result, particularly amongst larger format retailers, the demand for other types of retail and restaurants remains strong.
- The Metro Vancouver retail market emerged from the pandemic as one of the most resilient in the country with early reports in 2022 showing relatively fast recovery and fueled by population growth across the region and in the province<sup>14</sup>.
- As of today, the District has a total inventory of 2.3M sq. ft of retail space, for which demand has been remarkably strong both before and in the aftermath of the pandemic. As shown in Figure 25 below, retail vacancies in the District reached a high of only 2.8% during the pandemic, before falling to a sustained vacancy of less than 1% since the start of 2022, significantly outperforming many other parts of the region. However, this success comes at the cost of increased competition, with limited availability putting upward pressure on asking lease rates. The demand for retail spaces in the District led to transactions reaching \$38.62 sq. ft. as of 2023 Q3, the highest it has been since the price embarked on a continual upward trajectory in 2017.

**Figure 25: Commercial Retail Vacancy Rates, District of North Vancouver, 2023**



Source: CoStar Market Research

<sup>14</sup> JLL, 2022. [https://www.jll.ca/content/dam/jll-com/documents/pdf/research/Vancouver%20Retail%20Report%20Q1\\_2022.pdf](https://www.jll.ca/content/dam/jll-com/documents/pdf/research/Vancouver%20Retail%20Report%20Q1_2022.pdf)

- Local demographics and tourism opportunities make the District and North Shore region attractive markets for conducting businesses. The strong demand in commercial retail and related services following the pandemic suggests that the District has great potential to intensify economic activity and grow its employment base. However, it should be noted that factors such as transportation and housing are big contributors to attracting workers and visitors, and in turn, the capacity of which businesses operate.

#### 4.2.3 Institutional Land Use

- Institutional uses are population serving uses ranging from schools, places of worship, recreation centres, and public buildings. As such, the overall demand for institutional uses remains strong, with local population growth driving the intensification of community service and space provision.
- Regionally, staffing challenges and shortages during the pandemic have led to slow employment growth in certain Institutional sectors such as health care and government services. Inflationary pressures have also led to budget squeezes in funding for infrastructure upgrades and redevelopment projects.
- An uptick in new enrollments in the District and City of North Vancouver has meant that schools are operating at full capacity, with portables being used as classrooms and childcare provision in the area as new capital projects are being planned. While space constraint is the most visible challenge for the School District as enrollment numbers are on the rise, employment opportunities in the education sector are expected to be on the rise with teachers and other support staff needed to accommodate for the number of students<sup>15</sup>.
- Regional district and municipal governments are constantly evaluating the impacts of service and amenity demands on their local communities coupled with additional pressures from population growth. Municipalities across the Metro Vancouver region received a one-time provincial grant of \$400 million to be put towards for community facilities and infrastructure improvements<sup>16</sup>. The District received just over \$10M from the program which goes towards projects such as building new affordable housing and improving or building new community and recreational facilities.
- Infrastructure projects to enhance community recreation and culture have also been underway in

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<sup>15</sup> North Shore News, 2023. <https://www.nsnews.com/local-news/enrolment-up-in-north-van-as-students-head-back-to-school-7470742>

<sup>16</sup> Daily Hive, 2023. <https://dailyhive.com/vancouver/bc-government-growing-communities-fund-cities-allocation-amounts>



the District. The new Lynn Creek Community Recreation Centre is anticipated to open to the public early 2024, providing additional space for neighbourhood gathering and social programs and activities. The Lions Gate Community Recreation Centre also recently opened its doors to the public in April 2022, featuring a full-sized gymnasium for a range of sports and indoor and outdoor spaces for recreation and gathering. The development of community facilities such as these and the employment activity needed to support the operations are highly dependent on the local community. Given population forecasts, expansions to community programs and infrastructure development opportunities will be expected to meet the needs of residents in the District and surrounding communities.

### 4.3 Key Employment Growth Opportunity Areas

To accommodate growth in an efficient manner while encouraging the development of complete communities, the District of North Vancouver OCP directs growth to several strategic areas, including specifically designated mixed-use centres, commercial corridors, and industrial areas. These key Employment Growth Opportunity Areas represent existing agglomerations of businesses with linkages to critical infrastructure, transit linkages, and other services, all of which are considered advantageous when seeking to encourage sustainable forms for growth within the existing land base.

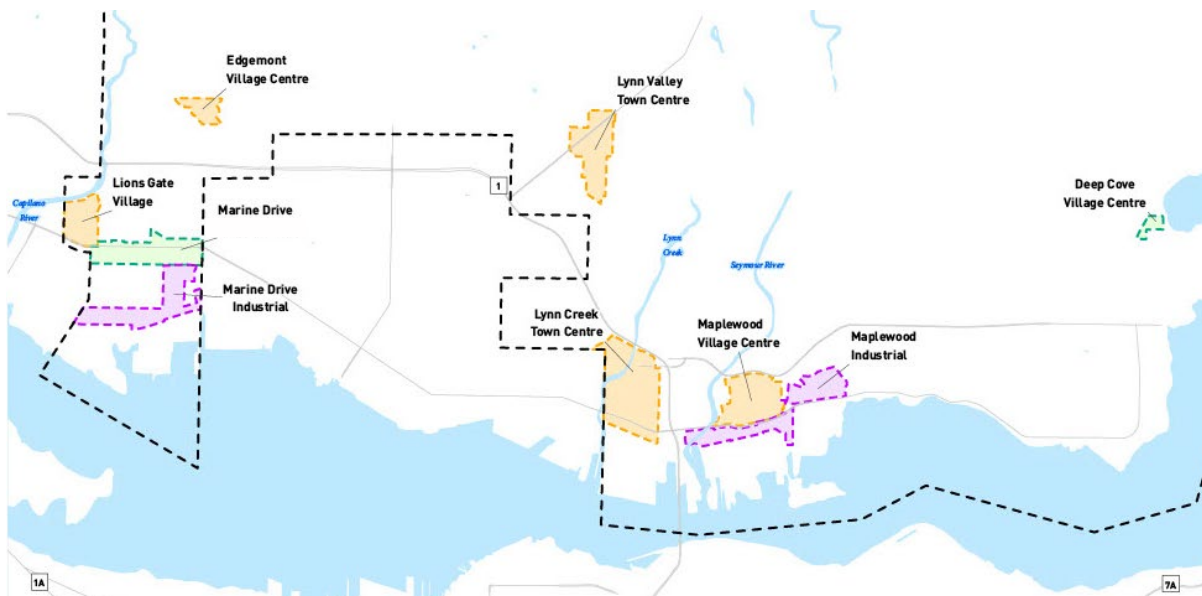
A total of nine Employment Growth Opportunity Areas were identified by District staff for the purpose of additional analysis in the context of this report. This includes two Town Centres and three Village Centres identified as key growth areas in the OCP, two additional mixed-use areas that represent key economic opportunities for commercial uses, and two additional industrial areas that represent key opportunities for industrial intensification over time. These areas are summarized in the following table and mapped in Figure 26 on the following page.

**Table 14: Key Employment Growth Opportunity Areas**

Town Centres and Village Centres	Additional Mixed-Use Areas	Additional Industrial Areas
<ul style="list-style-type: none"> <li>Edgemont Village Centre</li> <li>Lions Gate Village</li> <li>Lynn Creek Town Centre</li> <li>Lynn Valley Town Centre</li> <li>Maplewood Village Centre</li> </ul>	<ul style="list-style-type: none"> <li>Deep Cove Village Centre</li> <li>Marine Drive<sup>17</sup></li> </ul>	<ul style="list-style-type: none"> <li>Maplewood Industrial</li> <li>Marine Drive Industrial</li> </ul>

<sup>17</sup> Includes the Marine Drive corridor, which is not its own Village Centre, but is considered to a special study area that forms part of the Lions Gate Village Centre.

**Figure 26: Key Employment Growth Opportunity Areas, District of North Vancouver**



Taken together, these areas account for approximately 77% of the District’s Commercial employment space, 31% of its Industrial employment space, and 22% of its Institutional employment space. Based on the previous FSW calculations, they are estimated to account for 12,780 jobs in 2016 and 11,270 jobs in 2021. Excluding Work From Home, this equates to between 46 and 47% of all jobs in the District over this period. Additional details related to each of these Employment Growth Opportunity Areas are summarized in Table 15 on the following page.

Detailed profiles have been developed for each of these areas to inform the growth outlook and allocation exercise in the following Chapter. They include a summary of the land use and building inventory, development and business permit activity, and identification of opportunities and challenges with respect to each. These profiles are included in **Appendix B**.



**Table 15: Employment Growth Opportunity Areas – Key Statistics**

<b>DEEP COVE VILLAGE CENTRE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	57,900	-	-	57,900
District Share	0.9%	0.0%	0.0%	0.3%
Estimated Employment (2021)	95	-	-	95
Estimated Employment (2016)	110	-	-	110
<b>EDGEMONT VILLAGE CENTRE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	247,700	-	25,000	272,800
District Share	3.7%	0.0%	0.7%	1.6%
Estimated Employment (2021)	400	-	40	440
Estimated Employment (2016)	460	-	45	505
<b>LIONS GATE VILLAGE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	359,900	-	-	359,900
District Share	5.4%	0.0%	0.0%	2.1%
Estimated Employment (2021)	585	-	-	585
Estimated Employment (2016)	670	-	-	670
<b>LYNN CREEK TOWN CENTRE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	677,100	823,500	183,700	1,684,400
District Share	10.2%	12.4%	4.8%	9.9%
Estimated Employment (2021)	1,095	920	295	2,310
Estimated Employment (2016)	1,260	1,015	320	2,595
<b>LYNN VALLEY TOWN CENTRE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	481,100	-	14,500	495,700
District Share	7.3%	0.0%	0.4%	2.9%
Estimated Employment (2021)	780	-	25	805
Estimated Employment (2016)	895	-	25	920
<b>MAPLEWOOD VILLAGE CENTRE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	274,500	89,100	40,100	403,700
District Share	4.2%	1.3%	1.0%	2.4%
Estimated Employment (2021)	445	100	65	610
Estimated Employment (2016)	510	110	70	690
<b>MARINE DRIVE VILLAGE CENTRE</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	1,046,800	1,900	-	1,048,800
District Share	15.8%	0.0%	0.0%	6.1%
Estimated Employment (2021)	1,695	-	-	1,695
Estimated Employment (2016)	1,945	-	-	1,945
<b>MAPLEWOOD INDUSTRIAL</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	735,900	409,200	187,000	1,332,100
District Share	11.1%	6.2%	4.9%	7.8%
Estimated Employment (2021)	1,190	460	305	1,955
Estimated Employment (2016)	1,370	505	325	2,200
<b>MARINE DRIVE INDUSTRIAL</b>	<b>Commercial / Mixed Use</b>	<b>Industrial / Auxiliary</b>	<b>Institutional</b>	<b>Total</b>
Estimated Gross Floor Area (sq ft)	1,219,500	714,800	-	1,934,300
District Share	18.5%	10.8%	0.0%	11.3%
Estimated Employment (2021)	1,975	800	-	2,775
Estimated Employment (2016)	2,265	880	-	3,145

Source: B&A, using data adapted from Statistics Canada and the District of North Vancouver

## 5.0 GROWTH OUTLOOK AND DEMAND ANALYSIS

Building on the findings from the previous chapters, this section turns its attention to what the future of employment could look like in the District of North Vancouver, along with its implications for space. Starting with the regional population and employment forecast scenarios prepared by Metro Vancouver as part of the Metro 2050 Regional Growth Strategy, a demand analysis has been prepared to assess where future economic needs and potential gaps in land use development capacity are likely to occur.

### 5.1 Regional Projections as the Basis of the Employment Outlook

As a foundational part of its updates to the Regional Growth Strategy (RGS), Metro Vancouver prepares detailed projections of population, housing, and employment growth to create a shared roadmap for how growth should be managed across the region over the next 30 years. The most recent Metro 2050 projections provide a baseline scenario per year with a margin of plus or minus 15% to represent a general high or low reference for flexibility in where, how, and when growth is likely to occur based on the trends observed as part of the projection's preparation. The Metro 2050 regional, sub-regional and district level projections for population and employment growth is summarized in the table below<sup>18</sup>.

**Table 16: Metro 2050 Population and Employment Projection by Decade, 2016-2051**

POPULATION	2016	2021	2031	2041	2051	2016-51
Metro Vancouver	2,593,200	2,767,000	3,206,100	3,564,100	3,861,800	49%
North Shore	199,600	207,600	236,400	254,100	272,700	37%
District of North Vancouver	91,300	93,400	107,800	112,400	118,200	29%
EMPLOYMENT	2016	2021	2031	2041	2051	2016-51
Metro Vancouver	1,342,200	1,420,100	1,621,600	1,775,300	1,892,000	41%
North Shore	89,400	94,000	107,200	115,900	123,700	38%
District of North Vancouver	33,800	37,100	42,800	45,400	47,900	42%

Source: Metro Vancouver

<sup>18</sup> Metro Vancouver population and employment estimates are adjusted by an undercount rate of 4.6% based on estimates prepared by Statistics Canada to account for the number of persons that were not reported for when the Census was conducted. As such, the Metro 2050 numbers may appear inflated compared to the unadjusted numbers presented in the Census data.

As shown, the North Shore (comprised of the District of West Vancouver, District of North Vancouver, City of North Vancouver) is projected to grow over 73,000 residents by 2051, representing a growth rate of 37%. At the same time, employment projections for the Metro Vancouver region show that the workforce is expected to grow significantly with an approximate addition of nearly 550,000 jobs, with an allocation of employment opportunities in the North Shore sub-region close to an additional 34,000 jobs. At a local level, the District of North Vancouver is expected to absorb 37% of the population growth and 41% of the employment growth anticipated on the North Shore. Based on this assumption, DNV will be accommodating the most significant share of population and employment growth amongst the North Shore municipalities. This presents opportunities for the District to attract and retain workers across a range of employment and business activities to boost the local economy.

As they were published prior to the full release of the 2021 employment figures, the Metro 2050 projections did not fully capture the impacts of the pandemic, as indicated by the discrepancy between the projected 2021 employment count of 37,100 and the Census result of 39,690. To account for the shifts in employment resulting from Work From Home models and to encompass the varied affects of the pandemic on different industry sectors, the projections and following analysis at the local level in this ELA have been adjusted to match the employment changes as reported in the 2021 Census<sup>19</sup>.

Future growth projections following the height of the pandemic are expected to match the rate of Metro 2050 projections over time as industries revert to near normal operating conditions. However, while the overall split between jobs performed at Usual Places of Work and jobs Worked From Home is anticipated to narrow with more jobs returning to the workplace over the next five years, the ratio of Work From Home is expected to remain greater than prior to the pandemic.

## 5.2 Employment Projections by Land Use Class

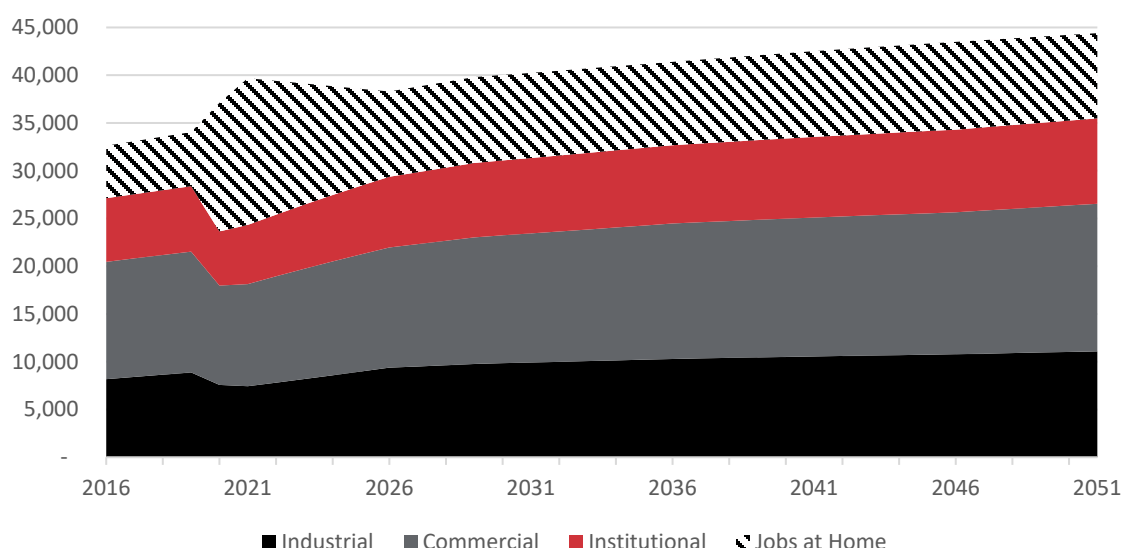
To develop the detailed employment outlook for the District of North Vancouver, we started with the Metro 2050 regional employment projections to the year 2051, which projected employment amongst the 14

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<sup>19</sup> With the recent Provincial announcement that the District of North Vancouver will need to target the minimum delivery of 2,838 additional housing units by 2028, with a full target of 3,784 units over that time, the Metro 2050 projections were assessed to determine if additional adjustments would be required to comply with the Provincial target. These changes were assessed in the context of the District's recent Housing Needs Report update from July 2023 and the most recent population and household projections prepared by BCStats, both of which served as a foundation for the Provincial targets. After detailed review, it was determined that while the full provincial target was higher than the projected Metro 2050 household growth of 3,144 units over the same time frame, other minor deviations in terms of projected population – and subsequently local labour force – were not considered sufficient to warrant additional adjustment to the employment forecasts.

industry subsectors and then allocated that growth downward to the local municipal level, providing a sectoral employment baseline. These projections by subsector were then adjusted downward to account for projection undercoverage<sup>20</sup> and broken out further in line with historic land use splits based on historical analysis. From here the projections were adjusted to reflect the higher than anticipated employment counts from the 2021 Census, while also applying assumptions for current and assumed future Work From Home ratios in each land use category. The adjusted results are shown broken out by Land Use Class in Figure 27.

**Figure 27: Employment Projection by Land Use Class, District of North Vancouver, 2016-2051**



Source: B&A Studios, using data from Metro Vancouver and Statistics Canada

The projection model assumes that the overall shocks of the pandemic that resulted in such significant local job growth due to increased Work From Home employment (which peaked at 39% of local jobs) will gradually decline over time, resulting in a total employment growth increment that is more closely in line with the original Metro 2050 projection by 2026. However, the overall share of Work From Home employment is not assumed to fully revert to the mean over this time, but instead remaining approximately 40% higher than the pre-pandemic trend by 2026 and only gradually declining before stabilizing at approximately 21% of all jobs from 2036 onwards.

<sup>20</sup> The Metro 2050 employment projections included a 4.6% undercoverage factor which results in slightly higher projected employment than historical census data would suggest. We remove this factor to allocate employment based on historical trends, while also presenting total employment figures that are more apples-to-apples comparable with future census counts.

Overall, the District is projected to see a net increase of approximately 4,700 jobs between 2021 and 2051. However, this represents an increase of 11,150 jobs that are tied to employment lands after accounting for the net decline of 6,440 Work From Home jobs as the impacts of the pandemic abate and more workers are called back to the office. A summary of the projected employment growth by category is provided in Table 17.

**Table 17: Projected Employment by Land Use Class, District of North Vancouver, 2016-2021**

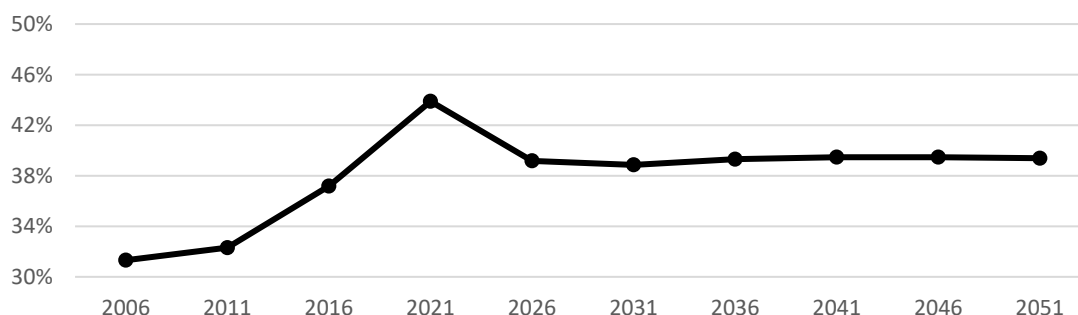
Land Use Class	2016	2021	2031	2041	2051	2021-51
Commercial	12,290	10,700	13,520	14,540	15,450	4,750
Institutional	6,670	6,190	7,900	8,430	8,940	2,750
Industrial	8,180	7,440	9,920	10,560	11,090	3,650
Work From Home	5,490	15,370	8,920	8,980	8,930	(6,440)
<b>Total</b>	<b>32,620</b>	<b>39,690</b>	<b>40,250</b>	<b>42,510</b>	<b>44,400</b>	<b>4,710</b>

Source: B&A Studios, using data from Metro Vancouver and Statistics Canada

This level of employment growth is ambitious but remains reasonable when assessed against historic activity rates and future estimated population. The biggest constraint will likely be the District's limited supply of employment supporting lands and its ability to attract new, higher density forms of development.

Figure 28 depicts the historic and projected employment rate for the District of North Vancouver. Following Work From Home related spike in 2021, employment activity is expected to return close to the pre-pandemic trend, slightly buffered by the increased share of Work From Home employment over the long term. The activity rate is expected to remain around the 39% level as the District's population gradually ages out of the workforce while newcomers and in-commuters continue to support local economic activity.

**Figure 28: Employment Activity Rate, District of North Vancouver, 2006-2051**



Source: B&A Studios, using data from Metro Vancouver and Statistics Canada

### 5.3 Estimating Future Employment Space Demand

Building on the projected employment growth, the next step is to model forward how these jobs are likely to translate into future floor space needs. This is done by applying a set of FSWs assumptions against the total employment for each Land Use Class over the projection period. These FSW assumptions have been developed based on the review of historic space utilization and emerging trends covered in Chapter 4 and are applied against all employment (both existing and new) for each given projection period. These projection assumptions are summarized in Table 18 below.

**Table 18: Historic and Assumed Floor Space Per Worker by Projection Period, 2016-2051**

Floor Space Per Worker	2016 <i>(historic)</i>	2021 <i>(historic)</i>	2031 <i>(projected)</i>	2041 <i>(projected)</i>	2051 <i>(projected)</i>
Commercial	538	618	538	527	517
Institutional	573	618	573	561	550
Industrial	813	894	792	773	753

Source: B&A

The FSWs for Commercial and Institutional employment are assumed to return to 2016 trend rates by 2031, while Industrial space is assumed to fall slightly lower than the pre-pandemic rate by 2031. This assumption is largely based on the lack of available industrial land and the challenges facing infill industrial redevelopment at higher densities. From 2031 onwards, the overall FSWs are assumed to decline modestly (roughly 2% per 10-year period for Commercial and Institutional, and 2.5% per 10-year period for Industrial) on account of various factors, including the effects of competition for space and efficiencies brought about through technology, automation, and hybrid work arrangements.

While these reductions to FSWs may seem modest, it is important to keep in mind that these figures represent averages that are applied against all employment in that Land Use Class. Even a modest change to these figures can result in significantly different demand needs over a thirty-year period.

Additionally, change may be challenging for many employers. Though some existing businesses can reassess and reorient their operations to find efficiencies, historical trends indicate that many are either slow or unable to do so. This is often also a function of the business activity itself, with different businesses having very different needs, even within a given Land Use Class.

The projected demand for space resulting from these assumptions are summarized in Table 19 below.

**Table 19: Historic and Assumed Floor Space Per Worker by Projection Period, 2016-2051**

Projected Floor Space Demand (sq. ft.)	2021 <i>(historic)</i>	2031 <i>(projected)</i>	2041 <i>(projected)</i>	2051 <i>(projected)</i>
Commercial	6,608,000	7,270,000	7,667,000	7,981,000
Institutional	3,820,000	4,522,000	4,734,000	4,917,000
Industrial	6,645,000	7,860,000	8,158,000	8,352,000
<b>Total</b>	<b>17,072,000</b>	<b>19,652,000</b>	<b>20,559,000</b>	<b>21,250,000</b>

Net Floor Space Demand (sq. ft.)	2021-31	2031-41	2041-51	2021-51
Commercial	662,000	397,000	314,000	<b>1,373,000</b>
Institutional	702,000	212,000	183,000	<b>1,097,000</b>
Industrial	1,215,000	298,000	194,000	<b>1,707,000</b>
<b>Total</b>	<b>2,580,000</b>	<b>907,000</b>	<b>691,000</b>	<b>4,177,000</b>

Source: B&A

Overall, the District is projected to require just shy of 4.2 million square feet of additional employment space over by 2051. Of that, a little less than 1.4 million square feet of net Commercial space demand is projected, roughly 80% of which is anticipated to be retail in nature. Institutional space demand is projected at just shy of 1.1 million square feet, while Industrial is projected at just over 1.7 million square feet.

It is crucial to keep in mind that these figures represent projected demand for space, and do not necessarily account for current constraints, be they policy or market based, that may limit or prohibit the successful development of this space in time for the demand to be realized. Should conditions not permit the delivery of this space, it is possible that the employment and economic activity tied to the space may be delayed, may choose to locate elsewhere in the region, or may not materialize at all. Conversely, there is no guarantee that if the space is built that the associated jobs will necessarily come to the District, as other macro-economic factors may impact the overall potential for growth.

Instead, these figures are intended to provide an approximate idea of how much space will need to be developed over the next thirty years in order to inform proper policy responses. The figures have been vetted against the available data and research into market trends, as we understand them today, and represent

what we consider to be, based on our professional experience, a reasonable expectation of growth potential. A summary breakdown of the projected increase and employment and space is provided in Table 20.

**Table 20: Net Employment Change and Floor Space Demand, District of North Vancouver, 2021-2051**

Net Employment Change	2021-2051	Share	Change
Commercial	4,750	43%	44%
Institutional	2,750	25%	45%
Industrial	3,650	32%	49%
<b>Employment Land Employment Total</b>	<b>11,160</b>	<b>100%</b>	<b>46%</b>

Net Floor Space Demand (sq. ft.)	2021-2051	Share	Change
Commercial	1,373,000	33%	21%
Institutional	1,097,000	26%	29%
Industrial	1,707,000	41%	26%
<b>Total</b>	<b>4,177,000</b>	<b>100%</b>	<b>24%</b>

Source: B&A

## 5.4 Allocating Growth Demand to Key Growth Opportunity Areas

To understand the implications of this projected employment and floor space demand, further analysis was conducted with regards to how and where such growth could be accommodated. As part of developing the profiles of the Key Growth Opportunity Areas (**Appendix B**), additional consideration was given to the availability of undeveloped and under-developed land based on current OCP designations. This assessment considered the existing supply of space and land, recent development and investment activity, market trends and locational preferences, and the capacity for future development under current land use policies and zoning.

Recognizing both the District's stated intent to direct growth towards these Key Opportunity Growth Areas and the realities of the available land supply and its capacity to accommodate infill redevelopment, a set of assumptions were developed as to the share of incremental growth in employment floor space that could be accommodated in each of the Key Opportunity Growth Areas, as well as the rest of the District. These allocations are intended to support future planning and economic development initiatives by



identifying both the existing growth trends, along with an alternative direction for growth that recognizes the District's policy ambitions. As such, the allocations are presented as a low and high range:

- **Low Scenario:** represents the current trajectory of growth under existing market trends, and land supply and policy constraints.
- **High Scenario:** represents an ambitious but feasible future where the District is successful in shifting additional investment and employment activity towards these nodes through proactive land use policy, coupled with favourable market conditions.

The key assumptions related to the historic, low, and high growth scenarios for each Key Growth Opportunity Area and the employment land uses within each are summarized in Table 21.

**Table 21: Assumed Distribution of Incremental Growth by Area, 2021-2051**

Key Growth Opportunity Area	Commercial			Industrial			Institutional (sq ft)		
	Current	Low	High	Current	Low	High	Current	Low	High
<b>Town &amp; Village Centres</b>	<b>47.6%</b>	<b>44%</b>	<b>65%</b>	<b>13.8%</b>	<b>11%</b>	<b>20%</b>	<b>6.9%</b>	<b>12%</b>	<b>34%</b>
Deep Cove VC	0.9%	1%	2%	0.0%	0%	0%	0.0%	0%	1%
Edgemont VC	3.7%	3%	5%	0.0%	0%	0%	0.7%	2%	3%
Lions Gate VC	5.4%	6%	9%	0.0%	0%	0%	0.0%	2%	6%
Lynn Creek TC	10.2%	10%	15%	12.4%	10%	14%	4.8%	4%	8%
Lynn Valley TC	7.3%	6%	8%	0.0%	0%	0%	0.4%	2%	6%
Maplewood VC	4.2%	6%	8%	1.3%	1%	6%	1.0%	2%	6%
Marine Drive	15.8%	12%	18%	0.0%	0%	0%	0.0%	0%	4%
<b>Industrial Areas</b>	<b>29.6%</b>	<b>16%</b>	<b>20%</b>	<b>16.9%</b>	<b>19%</b>	<b>30%</b>	<b>4.9%</b>	<b>3%</b>	<b>6%</b>
Maplewood IA	11.1%	8%	10%	6.2%	7%	14%	4.9%	3%	6%
Marine Drive IA	18.5%	8%	10%	10.8%	12%	16%	0.0%	0%	0%
<b>Rest of DNV</b>	<b>22.8%</b>	<b>40%</b>	<b>15%</b>	<b>69.3%</b>	<b>70%</b>	<b>50%</b>	<b>88.2%</b>	<b>85%</b>	<b>60%</b>

The allocation of growth shares to the various sub-areas are largely dependent on the availability of land, size of the sub-area, and existing zoning within and surrounding the areas. For example, Deep Cove Village Centre is a relatively small sub-area with few vacant Commercial parcels, limiting the possibility of accommodating for a substantial amount of growth. The area and its surrounding neighbourhoods are also not expected to experience considerable population growth, further limiting the amount of Commercial and Institutional employment demand in the area. Certain sub-areas can anticipate a lower growth rate than what it is currently because of a constrained land supply.

Additional notes regarding the assumed allocation of growth amongst different employment Land Use Classes are summarized as follows:

### **Commercial**

- Commercial employment is projected to have the greatest potential to be accommodated in the Key Growth Opportunity Areas, with between 60% and 85% of projected employment activity likely to locate within these locations, spread between retail and office uses in mixed-use formats.
- As of today, the built form of the Town and Village centres mostly consists of low-rise one or two storey retail and office spaces, including many auto-oriented strip malls with large surface parking lots. These parcels represent likely candidates for intensification via mixed-use redevelopment with at-grade commercial retail components.
- In some cases, mixed-use redevelopment may not result in a net increase in employment space beyond the existing commercial building it is replacing. To ensure the higher end assumptions are achieved, the District will likely need to look at policies that encourage or require a net increase in employment supporting space, most likely in the format of multi-storey retail and office podium components to future mixed-use developments.

### **Industrial**

- Industrial growth is split between the industrial waterfront and Key Growth Opportunity Areas (specifically Lynn Creek Town Centre, Maplewood Village Centre and the Maplewood and Marine Drive Industrial Areas). Between 30% to 50% of net Industrial growth could be accommodated in the Opportunity Areas, depending on the District's ability to encourage multi-storey intensification of existing lands.
- Lynn Creek Town Centre and Maplewood Village Centre both have considerable potential to attract higher order industrial intensified redevelopment, but also face pressure from other uses, including commercial and residential. The District will need to be cautious to find a balance in its land use policy to allow for a sufficient degree of flexibility to unlock the development potential of these lands without undermining the intended light-industrial function.
- While there is a considerable amount of projected industrial demand in terms of floor space (over 1.7 million square feet), it is possible that a few major projects could accommodate the bulk of this net demand. The District should be cognizant of opportunities to attract investment in its heavy industrial lands along the waterfront alongside smaller infill light-industrial projects.

## Institutional

- Institutional growth opportunities are more dispersed across the District, primarily located in schools, including Capilano University, and other community facilities. Future Institutional growth within the Key Growth Opportunity Areas is projected at between 15% and 40%.
- Demand for these services tend to follow local population growth. While most opportunities for intensification of Institutional uses are on existing school and community centre sites, there may be opportunities to incorporate future Institutional functions in mixed-use communities, particularly in the case of major developments.
- Capilano University represents a considerable portion of the District's potential for Institutional employment and floor space growth, much of which is already underway as part planned additions in line with the Campus Master Plan. While this growth is located outside of the Key Growth Opportunity Areas, there may be future opportunities to incorporate satellite campus functions into other mixed-use Centres, as was recently done at Lonsdale Quay.

The resulting allocation of projected floor space demand amongst each of the Key Growth Opportunity Areas is summarized in Table 22. A more detailed breakdown of the allocation is provided in **Appendix C**.

**Table 22: Projected Distribution of Gross Floor Area Growth by Area, 2021-2051**

Key Growth Opportunity Area	Commercial (sq ft)		Industrial (sq ft)		Institutional (sq ft)	
	Low	High	Low	High	Low	High
<b>Town &amp; Village Centres</b>	<b>604,000</b>	<b>892,000</b>	<b>188,000</b>	<b>341,000</b>	<b>132,000</b>	<b>373,000</b>
Deep Cove VC	14,000	27,000	-	-	-	11,000
Edgemont VC	41,000	69,000	-	-	22,000	33,000
Lions Gate VC	82,000	124,000	-	-	22,000	66,000
Lynn Creek TC	137,000	206,000	171,000	239,000	44,000	88,000
Lynn Valley TC	82,000	110,000	-	-	22,000	66,000
Maplewood VC	82,000	110,000	17,000	102,000	22,000	66,000
Marine Drive	165,000	247,000	-	-	-	44,000
<b>Industrial Areas</b>	<b>220,000</b>	<b>275,000</b>	<b>324,000</b>	<b>512,000</b>	<b>33,000</b>	<b>66,000</b>
Maplewood IA	110,000	137,000	120,000	239,000	33,000	66,000
Marine Drive IA	110,000	137,000	205,000	273,000	-	-
<b>Rest of DNV</b>	<b>549,000</b>	<b>206,000</b>	<b>1,195,000</b>	<b>854,000</b>	<b>932,000</b>	<b>658,000</b>
<b>Citywide Total</b>	<b>1,373,000</b>	<b>1,373,000</b>	<b>1,707,000</b>	<b>1,707,000</b>	<b>1,097,000</b>	<b>1,097,000</b>

Source: B&A Studios

## 5.5 Commercial Retail Demand Forecasts

In addition to the Metro Vancouver growth projections, a detailed retail forecast has also been prepared to provide an analysis of retail-commercial demand for the District covering a study period to 2041<sup>21</sup>. The methodology used in support of this report, and summarized below, focused on the following steps:

- Quantifying District of North Vancouver retail spending growth over the 2021 to 2041 period;
- Estimating District-Wide market capture of incremental spending;
- Estimating inflow spending from non-DNV residents; and,
- Converting incremental sales volume capture into market-supportable floor area.

Detailed analysis pertaining to each step mentioned provided in **Appendix D**, with the overall findings of the retail demand forecast summarized as follows:

- Based on historical trends in per capita retail spending, while assuming for modest growth in spending patterns over time, the total gross retail spend across all trade categories is expected to grow from \$1.77 billion to \$2.56 billion – an increase of roughly \$789 million or 48%.
- The retail spending model leverages quantified annual spending potential, including market capture rates of both local residents and visitors to the District, to project anticipated total sales volumes over the 2021 to 2041 period.
- Assuming that existing businesses will continue be supported by healthy spending levels and that additional facilities will generally be brought to market to meet new demand (i.e. beyond current levels), the forecasts estimate that the net increase in retail spending between 2021 and 2041 equates to 728,000 square feet of additional commercial retail space.
- Retail-commercial categories projected to grow in total spend by over \$50 million during this period, and therefore having the greatest impact in terms of infill redevelopment opportunities within the Key Growth Opportunity Areas include:
  - **Building materials, garden equipment & supplies** – increase of \$63.0M or 53%
  - **Supermarkets and grocery stores** – increase of \$70.1M or 29%
  - **General merchandise stores** – increase of \$88.4M or 46%
  - **Health and personal care stores** – growth of \$69.6M or 53%
  - **Restaurant food and beverage** – growth of \$108.4M or 45%

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<sup>21</sup> Retail demand forecasts typically fall in the 15- to 20-year time horizon. For the purposes of this review for the District, incremental retail demand has been modeled over a 20-year horizon.

- This growth was then allocated across the various Key Growth Opportunity Areas based on an assessment of infill redevelopment opportunities within each of the sub areas:
  - **Deep Cove Village Centre** – 11,000 net square feet
  - **Edgemont Village Centre** – 29,000 net square feet
  - **Maplewood Village Centre** – 51,000 net square feet
  - **Marine Drive** – 109,000 net square feet
  - **Lions Gate Village Centre** – 55,000 net square feet
  - **Lynn Valley Town Centre** – 51,000 net square feet
  - **Lynn Creek Town Centre** – 91,000 net square feet
  - **Maplewood Industrial Area** – 66,000 net square feet
  - **Marine Drive Industrial Area** – 66,000 net square feet
  - **Rest of the District** – 200,000 net square feet

## 5.6 Comparison of Projection Outputs

The space demand projections prepared by B&A and Urban Systems were developed in tandem and were intended to both inform and confirm the assumptions of the other. Generally speaking, the outputs of these outlooks are similar, with deviations based on different methodologies and timeframes. Whereas Urban Systems retail projection is based specifically on the expected space demand to serve the retail needs of a growing population, the B&A projection is adapted from Metro Vancouver’s regional projection of jobs, broken out by sector and translated into a floor space demand based on historic trends.

Notwithstanding the different approach, the two forecasts are very similar in results.

- The Urban Systems projection anticipates an incremental increase of 728,000 square feet of commercial retail space between 2021 and 2041. This projection is strictly for the space needed for retail sale of goods and for food and beverage establishments.
- B&A’s projections call for a net increase of 1,059,000 square feet for general Commercial space over the same period (2021-41). This results in a difference of 331,000 square feet over the same period.
- However, the Commercial category in B&A’s methodology is more expansive, including office employment, which is not considered in Urban System’s floor space demand. At roughly 300 square feet per worker, this difference would account for roughly 1,100 office workers, which is not far removed from the projected net increase of 1,130 in-person jobs in Professional Technical, Management Admin, and Finance and Real Estate over the same period under the B&A model.

## 6.0 SWOC ANALYSIS & KEY TAKEAWAYS

This chapter summarizes the findings of the Employment Lands Analysis for the District of North Vancouver broken down into an assessment of the current Strengths and Weaknesses that characterize the local economy, along with the Opportunities and Challenges that face its future growth. These are followed by a summary of key takeaways for further consideration when developing the policy actions and implementation plan for the Economic Development Strategy.

### 6.1 Strengths

- The District of North Vancouver's proximity to the mountain ranges to the north and waterfront to the south creates beneficial opportunities through the provision of recreational activities and amenities. The natural amenities are a significant draw for tourism and the film industry while the North Shore lifestyle is a strong attractor for businesses and customers alike.
- The District has a well-defined set of policies that direct growth towards a network of key nodes served by a concentration of commercial retail and office space build on existing employment clusters. Each of these nodes represent the potential for distinct complete communities, with different offerings for a wide range of businesses.
- The District of North Vancouver's non-residential property tax mill rates are lower than the Lower Mainland average. This gives the District an advantage to attract employers and new investment, particularly for heavy industrial users.
- The District is home to a notable concentration of highly educated, high-income individuals, many of which began working from home during the pandemic. These skilled workers may look to continue working from the District or be employed closer to home as these pandemic-related workplace shifts start to subside.
- Proximity to Downtown Vancouver is seen as a plus for many businesses with linkages to the Central Business District and other centrally located industries.
- The District of North Vancouver plays a major role in supporting the film industry and media production services the North Shore has to offer with film studios located within the District and in neighbouring municipalities. The identity of "Hollywood North" attracts filmmakers and production companies to seek location permits and post-production services in the District.
- Industrial lands in the District have the advantage of being close to or having direct access to the

Port of Vancouver. This provides unique advantages for transshipment related industries that are existing or looking to locate in the District.

- The District is home to a plethora of small businesses that serve as local amenities to residents and those that work in the city. They contribute to the vibrancy of the town and village centres and create connections between businesses and consumers while offering a range of goods and services.

## 6.2 Weaknesses

- Housing affordability and the high cost of living present a notable obstacle for District residents and employers alike. The rising costs of housing have made it difficult for members of the District's workforce to live close to where they work. Subsequently, employers face difficulties in attracting and retaining employees to meet their operational needs.
- The District's industrial lands are fully built out, with built space offering very little in the way of vacancy and availability. Without available space for new and expanding businesses, many are looking for options outside of the municipality. Competition for what space is available is likewise driving rent prices up across the District, potentially pushing out smaller businesses.
- Many existing buildings in light industrial areas are older in nature, and do not feature the design elements and amenities that make them desirable for modern businesses.
- The redevelopment of existing commercial properties, especially in Commercial-Residential Mixed-Use formats, may result in a net loss of space for commercial services and retail given that residential redevelopment often represents a higher return on investment. This threatens the existing supply and may undermine the vibrancy of key commercial nodes across the District.
- While the District's non-residential property tax mill rates average lower than the rest of the Lower Mainland, assessment values are resulting in higher taxes for some businesses. This is of particular concern for properties which have mixed-use potential, where the employment component is being taxed based on its residential redevelopment potential. This challenge is further exacerbated by triple net lease agreements passing along the cost to the businesses rather than landlords.
- There is currently a limited number of access points into the District and North Shore region from Downtown Vancouver and the rest of the Lower Mainland, creating transportation bottlenecks. This creates challenges for local businesses both in terms of attracting employees and ensuring the timely delivery of goods.

## 6.3 Opportunities

- The District of North Vancouver can leverage linkages to the natural amenities to expand tourism and opportunities tied to other business that value the North Shore's natural identity. Through the provision of recreational activities and marketing of its natural and cultural features, local businesses could benefit from increased foot traffic and tourist spending.
- These natural linkages can be also leveraged in the attraction of green-, smart-, and clean-tech related industries to contribute to the already existing agglomeration of industrial activity in the District.
- Capitalize on pandemic-induced locational preference shifts to potentially attract new investment in office space for satellite spaces that are re-evaluating their space needs.
- The District can leverage on its educational institutions, most notably Capilano University, for talent and skills that could be transferred over into the workforce through programs, community engagement opportunities, and hands-on experiential learning.
- The District should conduct an evaluation of light industrial and other mixed-use policies to ensure they are calibrated to unlock the redevelopment potential for their intended economic function, ensuring that these spaces continue to accommodate growth in the preferred forms of employment and economic activity.

## 6.4 Challenges

- The District generally lacks available greenfield lands to develop for new or expanding industrial and commercial businesses. This largely leaves more complicated and expensive redevelopment as the primary avenue for accommodating growth. However, this also leads to increased competition between different kinds of employment activity which are all facing the squeeze.
- Competing needs for housing may also pose risks for the preservation of remaining industrial lands and light industrial areas, including port and port-supporting lands. Issues of adjacencies to sensitive uses like residential and certain educational facilities may discourage the rezoning of land for industrial as well as intensification of industrial activities.
- The potential loss of industrial land through the conversion to non-industrial land will put the District's industry sectors at risk of being displaced to other regions that can provide adequate space for a more affordable price.
- Global economic headwinds caused by inflation, coupled with overall affordability issues in the



District and the North Shore, may slow the rate of employment and economic activity in the near term. Increasing rents and operational rates push out small retail businesses.

- General uncertainty regarding long term office location preferences and space needs makes it difficult to accurately plan and develop appropriate policies for office spaces.
- Critical transportation bottlenecks outside of the District's jurisdiction present logistical challenges for many local businesses that may increase as the region continues to grow and intensify.
- An ageing population in the District poses a risk to the economic productivity as the local population ages out of the workforce. At the same time, this may create additional pressures to provide new residential amenities and services.

## 6.5 Conclusions and Key Takeaways

The analysis from this ELA report presents the District of North Vancouver as a community with a unique and desirable community that has considerable opportunity for further population and employment growth. The District has demonstrated considerable success and resiliency emerging from the shadow of the COVID-19 pandemic, with many businesses rebounding and continuing to thrive, driving continued demand for space across the municipality. Challenges remain as the community transitions from a suburban pattern of development to a more strategic concentration of growth, presenting new considerations for attracting and accommodating investment and employment in intensified nodes. Capitalizing on its North Shore identity, the District remains well positioned to continue to grow an increasingly diverse and resilient economy.

Based on the analysis of emerging trends, the implications of employment projections and associated land demand, and the general findings of the SWOC analysis, key takeaways to be considered for the Economic Development Strategy have been summarized on the following two pages. These are categorized between general District-wide considerations, and recommendations related to the Key Growth Opportunity Areas, specifically.

## District-Wide

- A mix of land use zoning supplemented with comprehensive policies, is needed to encourage the development of preferred employment spaces that can support the range of businesses that are growing in the District. The District should continue to review current land use zoning permissions and supplementary policies to ensure they permit and encourage the development of space for preferred forms of economic activity.
- With industrial lands at risk increased risk, the District must ensure its land use policies and future initiatives prioritize the preservation the remaining industrial land supply.
- Consider expanding the permitted non-residential activities in select light industrial zones and designations to encourage the redevelopment of strategically located industrial stock at higher densities, while still maintaining the intended economic function.
- Form collaborative partnerships to determine the best possible use of industrial lands nearby the Port.
- Encourage the development of a mix of housing options in proximity to employment nodes that support local employers.
- Explore opportunities to incentivize the inclusion of live-work spaces for small businesses and offices in mixed-use residential redevelopment.
- Review mixed-use redevelopment requirements to ensure no net loss of employment space in key employment clusters.
- Review zoning permissions for commercial and mixed-use developments along commercial main streets to ensure a vibrant mix of ground floor retail and services.
- Explore policy options to encourage or require office functions be directed to above grade commercial spaces.
- Partner with neighbourhood-level business organizations to coordinate programing of public spaces through ground-up initiatives to encourage vibrancy and activation of commercial nodes.
- Allowing for the zoning of small retail hubs into residential areas outside of key commercial nodes to provide amenities and daily essentials.
- Improve connectivity between key commercial nodes, community amenities, and highly frequented public buildings to facilitate seamless mobility in addition to access to businesses along these corridors.

### Key Economic Growth Opportunity Areas

- Allow the key opportunity areas to become destinations of choice by activating public spaces, plazas, and streets to create attractive and unique qualities attractive to businesses, residents, and visitors.
- Conduct a review of density and related zoning policies and types of development on OCP-designated industrial District-owned land in North Maplewood, to create alignment of land use and activities that will accommodate employment growth due on a future constrained industrial land footprint in the area.
- Work in partnerships with Tsleil-Waututh First Nation to support the potential development of the Statlōw District in meeting the projected demand for goods and services as well as employment growth.
- Assess the density, built form, and mix of industrial, office, and commercial uses permitted under key opportunity light-industrial areas, such as Lynn Creek, Maplewood, and Pemberton/Marine Drive.
- Introduce a Commercial Office policy framework, including density bonusing in high-growth mixed-use and light industry intensification opportunity areas, such as Lynn Creek, Maplewood, Lion's Gate and surrounding commercial and industrial areas.
- Determine a baseline requirement for Commercial (Retail & Office) spaces along transit-oriented development corridors (such as Marine Drive) and within the areas identified as Transit Oriented Areas under recent provincial legislation to ensure employment space is provided alongside housing in areas of concentrated growth.



## **APPENDIX A: EMPLOYMENT SUMMARY BY SECTOR**

**Table 1. District of North Vancouver Employment by NAICS, Census 2021**

Industry - North American Industry Classification System (NAICS) 2012						
Metro Vancouver Projection Categories	Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
<b>Total – Place of Work Status</b>			<b>39,690</b>	<b>15,400</b>	<b>19,700</b>	<b>4,680</b>
Primary	11 Agriculture, forestry, fishing and hunting		150	60	50	40
	111-112 Farms	IND	50	20	30	0
	113 Forestry and logging	IND	30	15	0	15
	114 Fishing, hunting and trapping	IND	25	0	15	10
	115 Support activities for agriculture and forestry	IND	45	20	10	15
	21 Mining, quarrying, and oil and gas extraction		220	165	30	30
	211 Oil and gas extraction	IND	35	25	10	0
	212 Mining and quarrying (except oil and gas)	IND	110	95	0	15
Industry	213 Support activities for mining, and oil and gas extraction	IND	75	40	20	15
	48-49 Transportation and warehousing		1,480	295	780	445
	481 Air transportation	IND	35	0	0	35
	482 Rail transportation	IND	20	0	20	0
	483 Water transportation	IND	225	30	165	30
	484 Truck transportation	IND	130	30	55	45
	485 Transit and ground passenger transportation	IND	270	40	130	100
	486 Pipeline transportation	IND	0	0	0	0
	487 Scenic and sightseeing transportation	IND	0	0	0	0
	488 Support activities for transportation	IND	460	130	255	75
	491 Postal service	COM	125	10	100	15
	492 Couriers and messengers	COM	165	35	0	130
	493 Warehousing and storage	IND	50	10	40	0
	23 Construction		3,305	510	1,260	1,545
	236 Construction of buildings	IND	1,325	180	440	705
	237 Heavy and civil engineering construction	IND	270	50	175	45
	238 Specialty trade contractors	IND	1,710	275	640	795
	31-33 Manufacturing		2,265	415	1,860	40
	311 Food manufacturing	IND	145	15	120	10
	312 Beverage and tobacco product manufacturing	IND	35	20	15	0
	313 Textile mills	IND	0	0	0	0
	314 Textile product mills	IND	0	0	0	0
	315 Clothing manufacturing	IND	50	10	40	0
	316 Leather and allied product manufacturing	IND	0	0	0	0
	321 Wood product manufacturing	IND	110	60	50	0
	322 Paper manufacturing	IND	10	10	0	0
	323 Printing and related support activities	IND	60	30	30	0
	324 Petroleum and coal product manufacturing	IND	0	0	0	0
	325 Chemical manufacturing	IND	170	55	115	0
	326 Plastics and rubber products manufacturing	IND	0	0	0	0
	327 Non-metallic mineral product manufacturing	IND	20	0	20	0
	331 Primary metal manufacturing	IND	20	0	20	0
	332 Fabricated metal product manufacturing	IND	70	10	60	0
	333 Machinery manufacturing	IND	55	0	55	0
	334 Computer and electronic product manufacturing	IND	60	40	20	0
	335 Electrical equipment, appliance and component manufacturing	IND	45	45	0	0

Industry - North American Industry Classification System (NAICS) 2012						
Metro Vancouver Projection Categories	Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
Wholesale	336 Transportation equipment manufacturing	IND	1,100	50	1,050	0
	337 Furniture and related product manufacturing	IND	105	10	85	10
	339 Miscellaneous manufacturing	IND	210	50	160	0
	41 Wholesale trade		1,170	565	500	95
	411 Farm product merchant wholesalers	IND	0	0	0	0
	412 Petroleum and petroleum products merchant wholesalers	IND	10	0	10	0
	413 Food, beverage and tobacco merchant wholesalers	IND	180	65	85	30
	414 Personal and household goods merchant wholesalers	COM	250	120	115	15
	415 Motor vehicle and motor vehicle parts and accessories merchant wholesalers	IND	20	0	10	10
	416 Building material and supplies merchant wholesalers	IND	190	70	100	20
	417 Machinery, equipment and supplies merchant wholesalers	IND	320	225	75	20
	418 Miscellaneous merchant wholesalers	COM	90	25	65	0
	419 Business-to-business electronic markets, and agents and brokers	COM	110	65	45	0
Commercial Service	44-45 Retail trade		3,695	775	2,770	145
	441 Motor vehicle and parts dealers	IND	255	25	215	15
	442 Furniture and home furnishings stores	COM	85	40	45	0
	443 Electronics and appliance stores	COM	145	60	60	25
	444 Building material and garden equipment and supplies dealers	COM	80	10	70	0
	445 Food and beverage stores	COM	1,430	70	1,340	20
	446 Health and personal care stores	COM	250	50	180	20
	447 Gasoline stations	COM	70	0	70	0
	448 Clothing and clothing accessories stores	COM	330	165	150	15
	451 Sporting goods, hobby, book and music stores	COM	425	90	320	15
	452 General merchandise stores	COM	130	10	105	15
	453 Miscellaneous store retailers	COM	235	60	165	10
	454 Non-store retailers	COM	260	195	55	10
	52 Finance and insurance		2,205	1,560	625	35
	521 Monetary authorities - central bank	COM	0	0	0	0
	522 Credit intermediation and related activities	COM	850	515	320	15
	523 Securities, commodity contracts, and other financial investment and related activities	COM	595	520	75	0
	524 Insurance carriers and related activities	COM	760	520	225	15
	526 Funds and other financial vehicles	COM	0	0	0	0
	53 Real estate and rental and leasing		1,235	750	375	115
	531 Real estate	COM	1,130	725	300	105
	532 Rental and leasing services	COM	105	25	70	10
	533 Lessors of non-financial intangible assets (except copyrighted works)	COM	0	0	0	0
	55 Management of companies and enterprises		145	125	20	0
	551 Management of companies and enterprises	COM	145	125	20	0
	56 Administrative and support, waste management and remediation services		1,440	400	495	555
	561 Administrative and support services	COM	1,380	380	450	550
	562 Waste management and remediation services	IND	60	20	40	0

Industry - North American Industry Classification System (NAICS) 2012						
Metro Vancouver Projection Categories	Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
	81 Other services (except public administration)		1,795	555	1,110	125
	811 Repair and maintenance	IND	515	45	430	40
	812 Personal and laundry services	COM	540	145	360	35
	813 Religious, grant-making, civic, and professional and similar organizations	INS	395	260	115	20
	814 Private households	COM	345	110	205	30
	51 Information and cultural industries		1,700	1,025	325	360
	511 Publishing industries	COM	280	255	25	0
	512 Motion picture and sound recording industries	IND	860	440	90	330
	515 Broadcasting (except Internet)	IND	40	25	15	0
	517 Telecommunications	COM	310	205	75	30
	518 Data processing, hosting, and related services	COM	70	60	10	0
	519 Other information services	COM	140	35	105	0
	71 Arts, entertainment and recreation		1,495	400	960	130
	711 Performing arts, spectator sports and related industries	COM	360	255	95	10
	712 Heritage institutions	INS	70	10	50	10
	713 Amusement, gambling and recreation industries	COM	1,065	135	815	115
	54 Professional, scientific and technical services		6,600	4,750	1,640	210
	541 Professional, scientific and technical services	COM	6,600	4,750	1,640	210
	72 Accommodation and food services		1,720	110	1,550	65
	721 Accommodation services	COM	180	20	160	0
	722 Food services and drinking places	COM	1,540	90	1,390	60
Public Admin or Social Institutional	61 Educational services		3,600	1,050	2,315	235
	611 Educational services	INS	3,600	1,050	2,315	235
	62 Health care and social assistance		3,630	895	2,400	330
	621 Ambulatory health care services	INS	1,525	440	880	205
	622 Hospitals	INS	280	130	115	35
	623 Nursing and residential care facilities	INS	875	60	800	15
	624 Social assistance	INS	950	265	610	75
	22 Utilities		285	150	105	30
	221 Utilities	IND	285	150	105	30
	91 Public administration		1,555	850	545	155
	911 Federal government public administration	INS	545	365	110	70
	912 Provincial and territorial public administration	INS	315	235	55	25
	913 Local, municipal and regional public administration	INS	670	235	370	65
	914 Aboriginal public administration	INS	25	15	10	0
	919 International and other extra-territorial public administration	INS	0	0	0	0



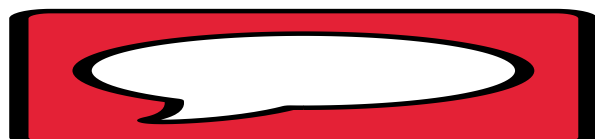
**Table 2. District of North Vancouver Employment by NAICS, Census 2016**

Industry - North American Industry Classification System (NAICS) 2012							
Metro Vancouver Projection Categories		Census Categories	Land Use	Total Jobs	Worked at Home	Usual place of work	No Fixed Place of Work
Total – Place of Work Status				32,615	5,490	21,965	5,240
Primary	Primary	11 Agriculture, forestry, fishing and hunting		105	10	50	50
		111-112 Farms	IND	55	0	35	20
		113 Forestry and logging	IND	0	0	0	0
		114 Fishing, hunting and trapping	IND	10	10	0	0
		115 Support activities for agriculture and forestry	IND	40	0	15	25
		21 Mining, quarrying, and oil and gas extraction		70	25	35	30
		211 Oil and gas extraction	IND	10	0	10	0
		212 Mining and quarrying (except oil and gas)	IND	10	10	0	0
		213 Support activities for mining, and oil and gas extraction	IND	50	10	20	20
Industry	Transportation Warehousing	48-49 Transportation and warehousing		1,560	50	1,185	340
		481 Air transportation	IND	95	0	20	75
		482 Rail transportation	IND	40	0	30	10
		483 Water transportation	IND	300	0	255	45
		484 Truck transportation	IND	165	10	100	55
		485 Transit and ground passenger transportation	IND	305	0	240	65
		486 Pipeline transportation	IND	10	0	10	0
		487 Scenic and sightseeing transportation	IND	15	0	0	15
		488 Support activities for transportation	IND	385	10	330	45
		491 Postal service	COM	135	0	125	10
		492 Couriers and messengers	COM	45	20	10	15
		493 Warehousing and storage	IND	65	0	65	0
	Construction	23 Construction		2,730	295	1,045	1,390
		236 Construction of buildings	IND	1,010	135	330	545
		237 Heavy and civil engineering construction	IND	265	25	190	50
		238 Specialty trade contractors	IND	1,455	135	520	800
	Manufacturing	31-33 Manufacturing		2,395	255	2,075	105
		311 Food manufacturing	IND	160	10	140	10
		312 Beverage and tobacco product manufacturing	IND	50	0	50	0
		313 Textile mills	IND	0	0	0	0
		314 Textile product mills	IND	15	0	15	0
		315 Clothing manufacturing	IND	155	15	140	0
		316 Leather and allied product manufacturing	IND	10	0	10	0
		321 Wood product manufacturing	IND	50	10	40	0
		322 Paper manufacturing	IND	35	10	25	0
		323 Printing and related support activities	IND	45	10	35	0
		324 Petroleum and coal product manufacturing	IND	25	0	25	0
		325 Chemical manufacturing	IND	285	40	220	25
		326 Plastics and rubber products manufacturing	IND	10	0	10	0
		327 Non-metallic mineral product manufacturing	IND	55	15	40	0
		331 Primary metal manufacturing	IND	10	0	10	0
		332 Fabricated metal product manufacturing	IND	130	20	95	15
		333 Machinery manufacturing	IND	175	25	140	10
		334 Computer and electronic product manufacturing	IND	125	15	100	10



Industry - North American Industry Classification System (NAICS) 2012						
Metro Vancouver Projection Categories	Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
	335 Electrical equipment, appliance and component manufacturing	IND	50	15	35	0
	336 Transportation equipment manufacturing	IND	690	10	680	0
	337 Furniture and related product manufacturing	IND	90	10	80	0
	339 Miscellaneous manufacturing	IND	230	40	180	10
	41 Wholesale trade		1,150	335	630	180
	411 Farm product merchant wholesalers	IND	0	0	0	0
	412 Petroleum and petroleum products merchant wholesalers	IND	0	0	0	0
	413 Food, beverage and tobacco merchant wholesalers	IND	145	50	65	30
	414 Personal and household goods merchant wholesalers	COM	255	55	155	45
	415 Motor vehicle and motor vehicle parts and accessories merchant wholesalers	IND	30	0	30	0
	416 Building material and supplies merchant wholesalers	IND	210	35	150	25
	417 Machinery, equipment and supplies merchant wholesalers	IND	260	110	100	50
	418 Miscellaneous merchant wholesalers	COM	160	45	100	15
	419 Business-to-business electronic markets, and agents and brokers	COM	90	40	35	15
Commercial Service	44-45 Retail trade		3,290	245	2,900	170
	441 Motor vehicle and parts dealers	IND	375	10	340	25
	442 Furniture and home furnishings stores	COM	120	10	110	0
	443 Electronics and appliance stores	COM	130	30	80	20
	444 Building material and garden equipment and supplies dealers	COM	180	20	160	0
	445 Food and beverage stores	COM	980	30	925	25
	446 Health and personal care stores	COM	235	15	180	40
	447 Gasoline stations	COM	90	0	90	0
	448 Clothing and clothing accessories stores	COM	295	10	270	15
	451 Sporting goods, hobby, book and music stores	COM	425	25	400	0
	452 General merchandise stores	COM	150	0	150	0
	453 Miscellaneous store retailers	COM	210	45	155	10
	454 Non-store retailers	COM	100	45	40	15
	52 Finance and insurance		950	280	590	75
	521 Monetary authorities - central bank	COM	0	0	0	0
	522 Credit intermediation and related activities	COM	370	60	290	20
	523 Securities, commodity contracts, and other financial investment and related activities	COM	240	145	70	25
	524 Insurance carriers and related activities	COM	340	80	235	25
	526 Funds and other financial vehicles	COM	0	0	0	0
	53 Real estate and rental and leasing		970	360	490	125
	531 Real estate	COM	845	350	375	120
	532 Rental and leasing services	COM	125	10	115	0
	533 Lessors of non-financial intangible assets (except copyrighted works)	COM	0	0	0	0
	55 Management of companies and enterprises		50	20	30	0
	551 Management of companies and enterprises	COM	50	20	30	0
	56 Administrative and support, waste management and remediation services		1,560	280	655	630

Industry - North American Industry Classification System (NAICS) 2012							
Metro Vancouver Projection Categories		Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
		561 Administrative and support services	COM	1,470	275	575	620
		562 Waste management and remediation services	IND	90	0	80	10
		81 Other services (except public administration)		1,795	245	1,330	215
		811 Repair and maintenance	IND	505	30	410	65
		812 Personal and laundry services	COM	495	75	365	55
		813 Religious, grant-making, civic, and professional and similar organizations	INS	320	60	215	45
	Information and Cultural Industries	814 Private households	COM	475	80	345	50
		51 Information and cultural industries		1,340	360	550	445
		511 Publishing industries	COM	190	130	30	30
		512 Motion picture and sound recording industries	IND	725	110	260	355
		515 Broadcasting (except Internet)	IND	25	15	10	0
		517 Telecommunications	COM	215	70	95	50
		518 Data processing, hosting, and related services	COM	10	10	0	0
		519 Other information services	COM	175	25	150	0
		71 Arts, entertainment and recreation		1,425	205	1,030	200
		711 Performing arts, spectator sports and related industries	COM	375	160	105	110
		712 Heritage institutions	INS	170	0	170	0
		713 Amusement, gambling and recreation industries	COM	880	45	750	85
	Professional Technical	54 Professional, scientific and technical services		3,570	1,715	1,470	385
		541 Professional, scientific and technical services	COM	3,570	1,715	1,470	385
	Accommodation Food	72 Accommodation and food services		2,585	80	2,360	140
		721 Accommodation services	COM	265	25	225	15
		722 Food services and drinking places	COM	2,320	60	2,135	125
Public Admin or Social Institutional	Education	61 Educational services		3,310	340	2,700	270
		611 Educational services	INS	3,310	340	2,700	270
	Health and Welfare	62 Health care and social assistance		2,700	325	2,010	360
		621 Ambulatory health care services	INS	1,055	135	730	190
		622 Hospitals	INS	150	25	80	45
		623 Nursing and residential care facilities	INS	600	25	560	15
		624 Social assistance	INS	895	150	635	110
	Public Admin	22 Utilities		105	25	55	25
		221 Utilities	IND	105	25	55	25
		91 Public administration		955	50	790	100
		911 Federal government public administration	INS	130	15	85	30
		912 Provincial and territorial public administration	INS	90	20	55	15
		913 Local, municipal and regional public administration	INS	725	15	655	55
		914 Aboriginal public administration	INS	10	0	10	0
		919 International and other extra-territorial public administration	INS	0	0	0	0



**Table 3. District of North Vancouver Employment by NAICS, Census 2011**

Industry - North American Industry Classification System (NAICS) 2012							
Metro Vancouver Projection Categories	Census Categories		Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
Total – Place of Work Status				27,980	4,430	18,270	5,280
Primary	Primary	11 Agriculture, forestry, fishing and hunting		0	0	0	0
		111-112 Farms	IND	0	0	0	0
		113 Forestry and logging	IND	0	0	0	0
		114 Fishing, hunting and trapping	IND	0	0	0	0
		115 Support activities for agriculture and forestry	IND	0	0	0	0
		21 Mining, quarrying, and oil and gas extraction		20	0	0	20
		211 Oil and gas extraction	IND	0	0	0	0
		212 Mining and quarrying (except oil and gas)	IND	0	0	0	0
		213 Support activities for mining, and oil and gas extraction	IND	20	0	0	20
Industry	Transportation Warehousing	48-49 Transportation and warehousing		940	0	720	220
		481 Air transportation	IND	75	0	0	75
		482 Rail transportation	IND	30	0	30	0
		483 Water transportation	IND	170	0	150	20
		484 Truck transportation	IND	75	0	45	30
		485 Transit and ground passenger transportation	IND	135	0	80	55
		486 Pipeline transportation	IND	0	0	0	0
		487 Scenic and sightseeing transportation	IND	0	0	0	0
		488 Support activities for transportation	IND	370	0	330	40
		491 Postal service	COM	70	0	70	0
		492 Couriers and messengers	COM	0	0	0	0
		493 Warehousing and storage	IND	15	0	15	0
	Construction	23 Construction		2,305	345	705	1,255
		236 Construction of buildings	IND	720	70	185	465
		237 Heavy and civil engineering construction	IND	165	0	90	75
		238 Specialty trade contractors	IND	1,420	275	430	715
	Manufacturing	31-33 Manufacturing		1,650	75	1,560	15
		311 Food manufacturing	IND	80	0	80	0
		312 Beverage and tobacco product manufacturing	IND	0	0	0	0
		313 Textile mills	IND	0	0	0	0
		314 Textile product mills	IND	0	0	0	0
		315 Clothing manufacturing	IND	65	0	65	0
		316 Leather and allied product manufacturing	IND	0	0	0	0
		321 Wood product manufacturing	IND	0	0	0	0
		322 Paper manufacturing	IND	45	0	45	0
		323 Printing and related support activities	IND	0	0	0	0
		324 Petroleum and coal product manufacturing	IND	40	0	40	0
		325 Chemical manufacturing	IND	290	25	265	0
		326 Plastics and rubber products manufacturing	IND	0	0	0	0
		327 Non-metallic mineral product manufacturing	IND	35	20	15	0
		331 Primary metal manufacturing	IND	0	0	0	0
		332 Fabricated metal product manufacturing	IND	95	0	95	0
		333 Machinery manufacturing	IND	175	0	175	0
		334 Computer and electronic product manufacturing	IND	45	0	45	0

Industry - North American Industry Classification System (NAICS) 2012							
Metro Vancouver Projection Categories		Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
		335 Electrical equipment, appliance and component manufacturing	IND	30	0	30	0
		336 Transportation equipment manufacturing	IND	420	0	420	0
		337 Furniture and related product manufacturing	IND	125	0	110	15
		339 Miscellaneous manufacturing	IND	205	30	175	0
	Wholesale	41 Wholesale trade		795	210	465	120
		411 Farm product merchant wholesalers	IND	0	0	0	0
		412 Petroleum and petroleum products merchant wholesalers	IND	0	0	0	0
		413 Food, beverage and tobacco merchant wholesalers	IND	40	0	15	25
		414 Personal and household goods merchant wholesalers	COM	240	40	155	45
		415 Motor vehicle and motor vehicle parts and accessories merchant wholesalers	IND	0	0	0	0
		416 Building material and supplies merchant wholesalers	IND	105	35	70	0
		417 Machinery, equipment and supplies merchant wholesalers	IND	225	65	130	30
		418 Miscellaneous merchant wholesalers	COM	110	40	70	0
		419 Business-to-business electronic markets, and agents and brokers	COM	75	30	25	20
Commercial Service	Retail	44-45 Retail trade		3,085	235	2,690	160
		441 Motor vehicle and parts dealers	IND	340	15	325	0
		442 Furniture and home furnishings stores	COM	60	0	45	15
		443 Electronics and appliance stores	COM	90	20	70	0
		444 Building material and garden equipment and supplies dealers	COM	95	0	80	15
		445 Food and beverage stores	COM	1,200	15	1,150	35
		446 Health and personal care stores	COM	235	0	215	20
		447 Gasoline stations	COM	95	40	55	0
		448 Clothing and clothing accessories stores	COM	235	30	165	40
		451 Sporting goods, hobby, book and music stores	COM	345	15	315	15
		452 General merchandise stores	COM	90	0	90	0
	Finance and Real Estate	453 Miscellaneous store retailers	COM	195	30	145	20
		454 Non-store retailers	COM	105	70	35	0
		52 Finance and insurance		1,005	250	650	105
		521 Monetary authorities - central bank	COM	0	0	0	0
		522 Credit intermediation and related activities	COM	435	75	340	20
		523 Securities, commodity contracts, and other financial investment and related activities	COM	195	110	55	30
		524 Insurance carriers and related activities	COM	375	65	255	55
		526 Funds and other financial vehicles	COM	0	0	0	0
		53 Real estate and rental and leasing		920	385	430	105
	531 Real estate	COM	860	385	370	105	
	532 Rental and leasing services	COM	60	0	60	0	
	533 Lessors of non-financial intangible assets (except copyrighted works)	COM	0	0	0	0	
	55 Management of companies and enterprises		0	0	0	0	

Industry - North American Industry Classification System (NAICS) 2012							
Metro Vancouver Projection Categories		Census Categories	Land Use	Total Jobs	Worked at home	Usual place of work	No Fixed Place of Work
	Mgmt Admin Other Services	551 Management of companies and enterprises	COM	0	0	0	0
		56 Administrative and support, waste management and remediation services		1,425	125	685	615
		561 Administrative and support services	COM	1,355	125	615	615
		562 Waste management and remediation services	IND	70	0	70	0
		81 Other services (except public administration)		1,715	250	1,215	250
		811 Repair and maintenance	IND	605	25	490	90
		812 Personal and laundry services	COM	425	75	265	85
		813 Religious, grant-making, civic, and professional and similar organizations	INS	270	45	215	10
		814 Private households	COM	415	105	245	65
	Information and Cultural Industries	51 Information and cultural industries		1,660	265	445	950
		511 Publishing industries	COM	305	70	50	185
		512 Motion picture and sound recording industries	IND	835	110	230	495
		515 Broadcasting (except Internet)	IND	0	0	0	0
		517 Telecommunications	COM	280	85	45	150
		518 Data processing, hosting, and related services	COM	0	0	0	0
		519 Other information services	COM	240	0	120	120
		71 Arts, entertainment and recreation		1,200	160	880	160
		711 Performing arts, spectator sports and related industries	COM	310	125	100	85
		712 Heritage institutions	INS	195	0	195	0
		713 Amusement, gambling and recreation industries	COM	695	35	585	75
	Professional Technical	54 Professional, scientific and technical services		3,540	1,575	1,580	385
		541 Professional, scientific and technical services	COM	3,540	1,575	1,580	385
	Accommodation Food	72 Accommodation and food services		1,570	60	1,385	125
		721 Accommodation services	COM	245	45	200	0
		722 Food services and drinking places	COM	1,325	15	1,185	125
Public Admin or Social Institutional	Education	61 Educational services		3,020	190	2,540	290
		611 Educational services	INS	3,020	190	2,540	290
	Health and Welfare	62 Health care and social assistance		2,060	270	1,460	330
		621 Ambulatory health care services	INS	835	125	545	165
		622 Hospitals	INS	60	0	60	0
		623 Nursing and residential care facilities	INS	600	0	530	70
		624 Social assistance	INS	565	145	325	95
	Public Admin	22 Utilities		85	0	85	0
		221 Utilities	IND	85	0	85	0
		91 Public administration		985	35	775	175
		911 Federal government public administration	INS	275	35	170	70
		912 Provincial and territorial public administration	INS	55	0	55	0
		913 Local, municipal and regional public administration	INS	635	0	530	105
		914 Aboriginal public administration	INS	20	0	20	0
		919 International and other extra-territorial public administration	INS	0	0	0	0



**Table 4. District of North Vancouver Employment by NAICS, Census 2006**

Industry - North American Industry Classification System (NAICS) 2012							
Metro Vancouver Projection Categories		Census Categories	Land Use	Total - Place of work status	Worked at home	Usual place of work	No Fixed Place of Work
Total – Place of Work Status				27,980	4,430	18,270	5,280
Primary	Primary	11 Agriculture, forestry, fishing and hunting		60	20	0	40
		111-112 Farms	IND	0	0	0	0
		113 Forestry and logging	IND	0	0	0	0
		114 Fishing, hunting and trapping	IND	25	10	0	15
		115 Support activities for agriculture and forestry	IND	35	10	0	25
		21 Mining, quarrying, and oil and gas extraction		90	35	35	20
		211 Oil and gas extraction	IND	10	0	10	0
		212 Mining and quarrying (except oil and gas)	IND	10	0	10	0
		213 Support activities for mining, and oil and gas extraction	IND	70	35	15	20
Industry	Transportation Warehousing	48-49 Transportation and warehousing		1,280	50	915	315
		481 Air transportation	IND	55	0	0	55
		482 Rail transportation	IND	75	0	65	10
		483 Water transportation	IND	215	0	205	10
		484 Truck transportation	IND	175	10	100	65
		485 Transit and ground passenger transportation	IND	240	0	160	80
		486 Pipeline transportation	IND	0	0	0	0
		487 Scenic and sightseeing transportation	IND	0	0	0	0
		488 Support activities for transportation	IND	345	40	260	45
		491 Postal service	COM	100	0	80	20
		492 Couriers and messengers	COM	40	0	10	30
		493 Warehousing and storage	IND	35	0	35	0
	Construction	23 Construction		1,900	265	560	1,075
		236 Construction of buildings	IND	700	110	180	410
		237 Heavy and civil engineering construction	IND	105	20	65	20
		238 Specialty trade contractors	IND	1,095	135	315	645
	Manufacturing	31-33 Manufacturing		2,160	165	1,890	105
		311 Food manufacturing	IND	100	0	100	0
		312 Beverage and tobacco product manufacturing	IND	0	0	0	0
		313 Textile mills	IND	0	0	0	0
		314 Textile product mills	IND	0	0	0	0
		315 Clothing manufacturing	IND	95	0	95	0
		316 Leather and allied product manufacturing	IND	0	0	0	0
		321 Wood product manufacturing	IND	95	25	50	20
		322 Paper manufacturing	IND	35	10	25	0
		323 Printing and related support activities	IND	55	0	55	0
		324 Petroleum and coal product manufacturing	IND	10	0	10	0
		325 Chemical manufacturing	IND	270	50	205	15
		326 Plastics and rubber products manufacturing	IND	15	0	15	0
		327 Non-metallic mineral product manufacturing	IND	55	10	45	0
		331 Primary metal manufacturing	IND	10	0	10	0
		332 Fabricated metal product manufacturing	IND	265	25	225	15
		333 Machinery manufacturing	IND	110	0	110	0
		334 Computer and electronic product manufacturing	IND	90	15	75	0
		335 Electrical equipment, appliance and component manufacturing	IND	0	0	0	0
		336 Transportation equipment manufacturing	IND	605	10	575	20

Industry - North American Industry Classification System (NAICS) 2012						
Metro Vancouver Projection Categories	Census Categories	Land Use	Total - Place of work status	Worked at home	Usual place of work	No Fixed Place of Work
Wholesale	337 Furniture and related product manufacturing	IND	155	0	135	20
	339 Miscellaneous manufacturing	IND	195	20	160	15
	41 Wholesale trade		990	305	560	125
	411 Farm product merchant wholesalers	IND	0	0	0	0
	412 Petroleum and petroleum products merchant wholesalers	IND	10	0	0	10
	413 Food, beverage and tobacco merchant wholesalers	IND	85	30	55	0
	414 Personal and household goods merchant wholesalers	COM	200	75	105	20
	415 Motor vehicle and motor vehicle parts and accessories merchant wholesalers	IND	20	0	20	0
	416 Building material and supplies merchant wholesalers	IND	130	10	120	0
	417 Machinery, equipment and supplies merchant wholesalers	IND	215	60	105	50
	418 Miscellaneous merchant wholesalers	COM	200	65	125	10
	419 Business-to-business electronic markets, and agents and brokers	COM	130	65	30	35
Commercial Service	44-45 Retail trade		2,755	210	2,425	120
	441 Motor vehicle and parts dealers	IND	215	0	215	0
	442 Furniture and home furnishings stores	COM	85	10	60	15
	443 Electronics and appliance stores	COM	185	15	155	15
	444 Building material and garden equipment and supplies dealers	COM	90	0	90	0
	445 Food and beverage stores	COM	1,100	25	1,040	35
	446 Health and personal care stores	COM	125	10	115	0
	447 Gasoline stations	COM	75	0	75	0
	448 Clothing and clothing accessories stores	COM	205	20	175	10
	451 Sporting goods, hobby, book and music stores	COM	235	25	210	0
	452 General merchandise stores	COM	150	0	150	0
	453 Miscellaneous store retailers	COM	200	55	125	20
	454 Non-store retailers	COM	90	50	15	25
	52 Finance and insurance		1,000	335	610	55
	521 Monetary authorities - central bank	COM	0	0	0	0
	522 Credit intermediation and related activities	COM	430	100	290	40
	523 Securities, commodity contracts, and other financial investment and related activities	COM	195	160	20	15
	524 Insurance carriers and related activities	COM	375	75	300	0
	526 Funds and other financial vehicles	COM	0	0	0	0
	53 Real estate and rental and leasing		800	350	335	115
	531 Real estate	COM	735	350	285	100
	532 Rental and leasing services	COM	65	0	50	15
	533 Lessors of non-financial intangible assets (except copyrighted works)	COM	0	0	0	0
	55 Management of companies and enterprises		10	0	0	10
	551 Management of companies and enterprises	COM	10	0	0	10
	56 Administrative and support, waste management and remediation services		1,060	135	555	370
	561 Administrative and support services	COM	985	135	480	370
	562 Waste management and remediation services	IND	75	0	75	0
	81 Other services (except public administration)		1,625	270	1,180	175
	811 Repair and maintenance	IND	605	55	515	35

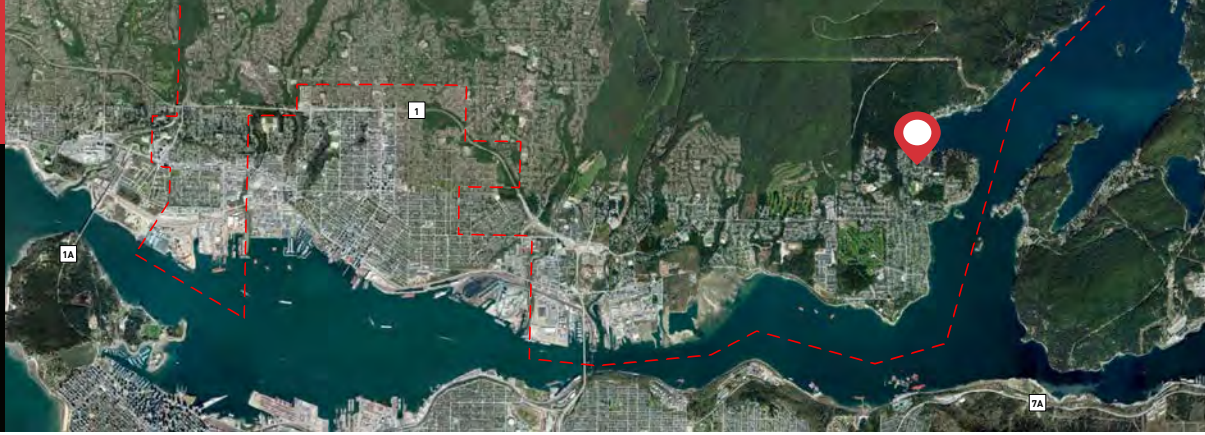
Industry - North American Industry Classification System (NAICS) 2012						
Metro Vancouver Projection Categories	Census Categories	Land Use	Total - Place of work status	Worked at home	Usual place of work	No Fixed Place of Work
Information and Cultural Industries	812 Personal and laundry services	COM	345	50	245	50
	813 Religious, grant-making, civic, and professional and similar organizations	INS	360	65	240	55
	814 Private households	COM	315	100	180	35
	51 Information and cultural industries		995	325	290	380
	511 Publishing industries	COM	205	150	30	25
	512 Motion picture and sound recording industries	IND	535	145	55	335
	515 Broadcasting (except Internet)	IND	20	0	20	0
	517 Telecommunications	COM	125	20	85	20
	518 Data processing, hosting, and related services	COM	10	10	0	0
	519 Other information services	COM	100	0	100	0
	71 Arts, entertainment and recreation		1,090	240	645	205
	711 Performing arts, spectator sports and related industries	COM	395	225	35	135
	712 Heritage institutions	INS	130	0	130	0
	713 Amusement, gambling and recreation industries	COM	565	15	480	70
	54 Professional, scientific and technical services		2,640	1,490	820	330
	541 Professional, scientific and technical services	COM	2,640	1,490	820	330
	72 Accommodation and food services		1,820	85	1,615	120
	721 Accommodation services	COM	380	50	330	0
Public Admin or Social Institutional	722 Food services and drinking places	COM	1,440	35	1,285	120
	61 Educational services		2,585	265	2,140	180
	611 Educational services	INS	2,585	265	2,140	180
	62 Health care and social assistance		2,170	375	1,570	225
	621 Ambulatory health care services	INS	680	150	415	115
	622 Hospitals	INS	275	15	260	0
	623 Nursing and residential care facilities	INS	550	0	515	35
	624 Social assistance	INS	665	210	380	75
	22 Utilities		85	30	30	25
	221 Utilities	IND	85	30	30	25
	91 Public administration		740	20	605	115
	911 Federal government public administration	INS	50	10	30	10
Public Admin	912 Provincial and territorial public administration	INS	45	0	35	10
	913 Local, municipal and regional public administration	INS	630	10	525	95
	914 Aboriginal public administration	INS	15	0	15	0
	919 International and other extra-territorial public administration	INS	0	0	0	0







## **APPENDIX B: KEY GROWTH OPPORTUNITY AREA PROFILES**



## Deep Cove Village

Known for its picturesque views, Deep Cove Village is a small commercial node oriented toward the waterfront and nearby marina. Its quaint aesthetic and connection to the natural beauty of the North Shore and Indian Arm make Deep Cove a destination for locals and tourists alike. It is also known as a common destination for on-location shoots for the regional film industry. Comprised primarily of modest commercial uses fronting onto Gallant Avenue, Deep Cove is an OCP designated Village Centre but it is not considered a primary growth centre. The District has recently initiated the construction along Gallant Avenue as part of the Livable Deep Cove Project, which is intended to create more accessible and vibrant space through the core of the area.



### OPPORTUNITIES

- + Deep Cove Village is a unique commercial hub with a distinct identity closely tied to that of the North Shore.
- + Recent investments in the public realm on Gallant Ave are increasing the accessibility and desirability of the area attracting more people to spend time in Deep Cove.
- + The area serves as a destination for both local residents, tourists, and the film industry.
- + Partnerships with local businesses to invest in additional programs to program and activate the primary street front, along with events to attract additional visitors to the area.



### CHALLENGES

- Deep Cove village is not a primary growth centre for the District. Demand growth from local residents is likely to be limited, as the area is not anticipating significant levels of intensification.
- Demand for additional employment growth is anticipated to be tied to tourism and macro-level trends which are largely beyond the DNV's control.
- There are few parcels in the area that could accommodate additional non-residential space under current policies.

## + Official Community Plan Land Use Designation



Source: District of North Vancouver

Sub-area Boundary

OCP Class

COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3

INSTITUTIONAL

PARKS, OPEN SPACE, AND NATURAL AREAS

RESIDENTIAL LEVEL 2: RESIDENTIAL

RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY

RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT

## + Developable Area by OCP Designation (2023)

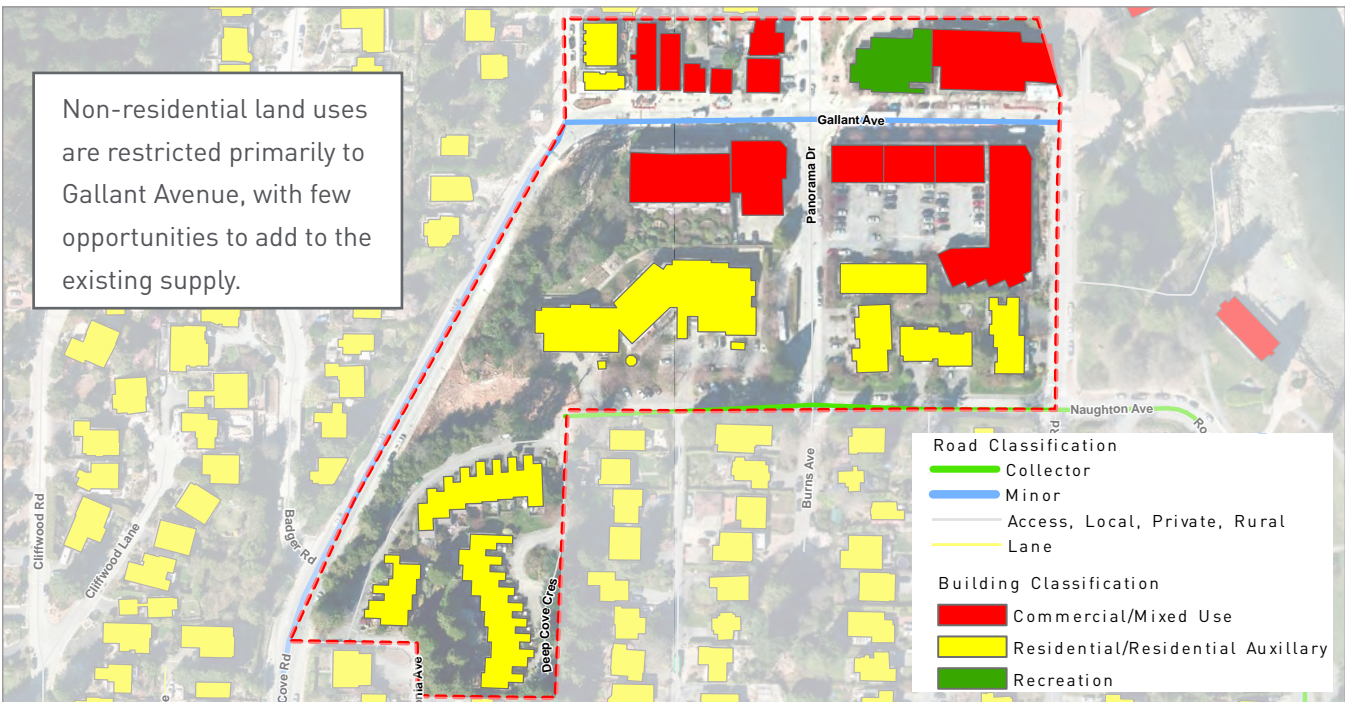
Non-Employment Land	ha	Employment Land	ha
Roads	1 ha	Commercial/ Mixed Use	1 ha
Parks and Open Space	0.3 ha	Institutional	0.1 ha
Residential	2 ha	Industrial	-
<b>Total Employment Land *</b>			<b>1 ha</b>
<b>Total Developable Area*</b>			<b>3 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver



## + Employment Space



Source: District of North Vancouver

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	3,900	7%	10
Mixed Use	54,000	93%	90
Institutional	-	-	-
Industrial	-	-	-
Auxiliary	-	-	-
Total Non-Residential Floor Space*	57,900	100%	100

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

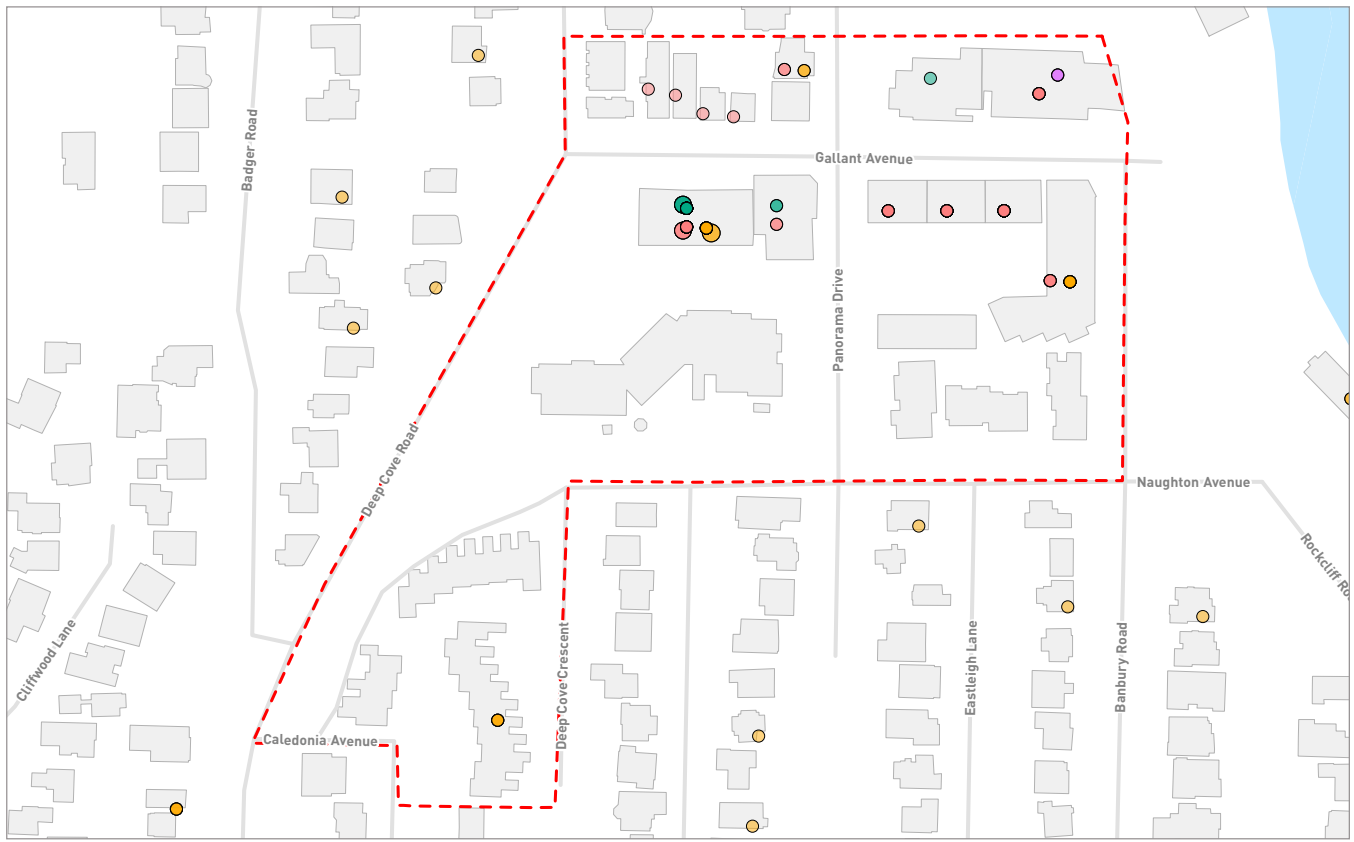
## + Projected Employment Demand-2021-2051

	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	14,000 to 27,000	45 to 70
Institutional	0 to 11,000	0 to 20
Industrial/ Auxiliary	-	-

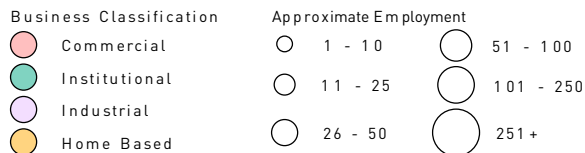
Source: B&A & Urban Systems, based on data adapted from Metro Vancouver



## + 2023 Business License Locations



Source: District of North Vancouver



## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	34
Institutional	11
Industrial	3
Home Based	16
<b>Total</b>	<b>64</b>

Source: District of North Vancouver



# + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

Building Permit Classification	Permit Valuation (\$)
New Build	1000 - 10000
Major Addition	10001 - 100000
Major Alteration	100001 - 500000
	500001 - 1000000
	1000001+

Most of the remaining parcels owned by the DNV are designated as Parks and Open Space, presenting limited opportunity for redevelopment.

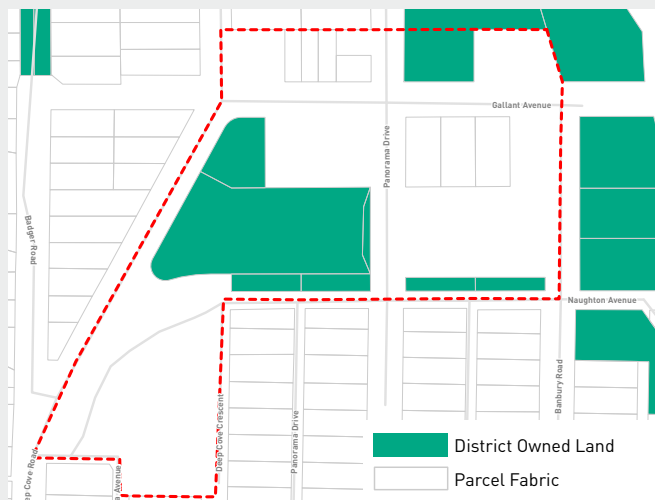
## + Non-Residential Building Permit Activity (2011-2023) + District Owned Land

	Permits Issued	Value**
New Build	-	-
Major Addition	-	-
Major Alteration	3	\$287,000
Total*	3	\$287,000

\*Figures may not sum to total due to rounding

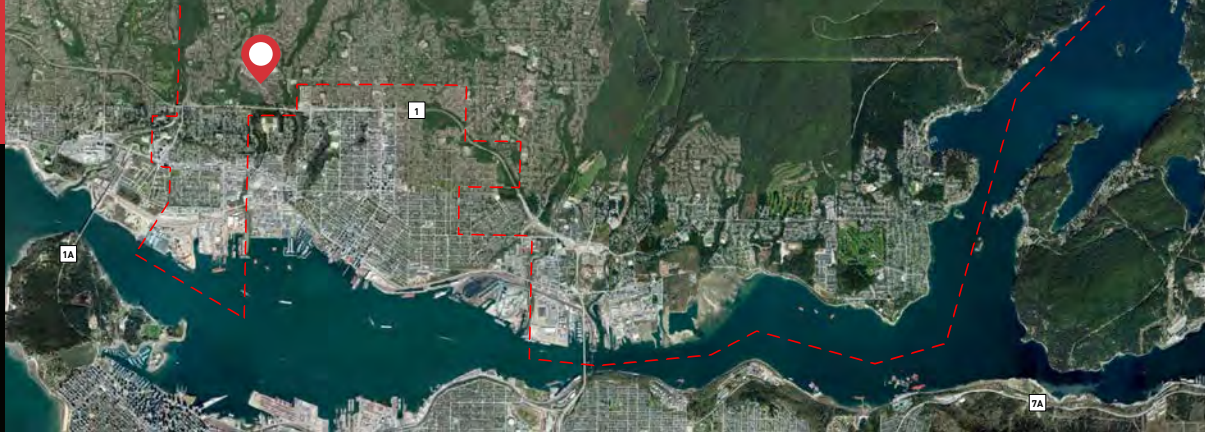
\*\* Permit Valuation is based on construction value

Source: District of North Vancouver



District Owned Land  
Parcel Fabric





## Edgemont Village Centre

With a unique character established around a well established commercial main street, Edgemont Village serves as both a local service centre for the northwest portion of the District, and a destination for certain retail and tourism related activities. The concentration of commercial uses with occasional institutional and low-density apartments in the Village Core are surrounded by low density residential in the periphery. Following the adoption of the Edgemont Village Centre: Plan and Design Guidelines in 2014, Edgemont Village experienced considerable mixed use development activity, which has tapered in recent years. The Edgemont Village Centre plan includes opportunities to introduce more mid-density residential uses with retail uses at grade in the Village Core, with low density multi-family residential uses the surrounding area to act as a transitional buffer between the Village Core and periphery.



### OPPORTUNITIES

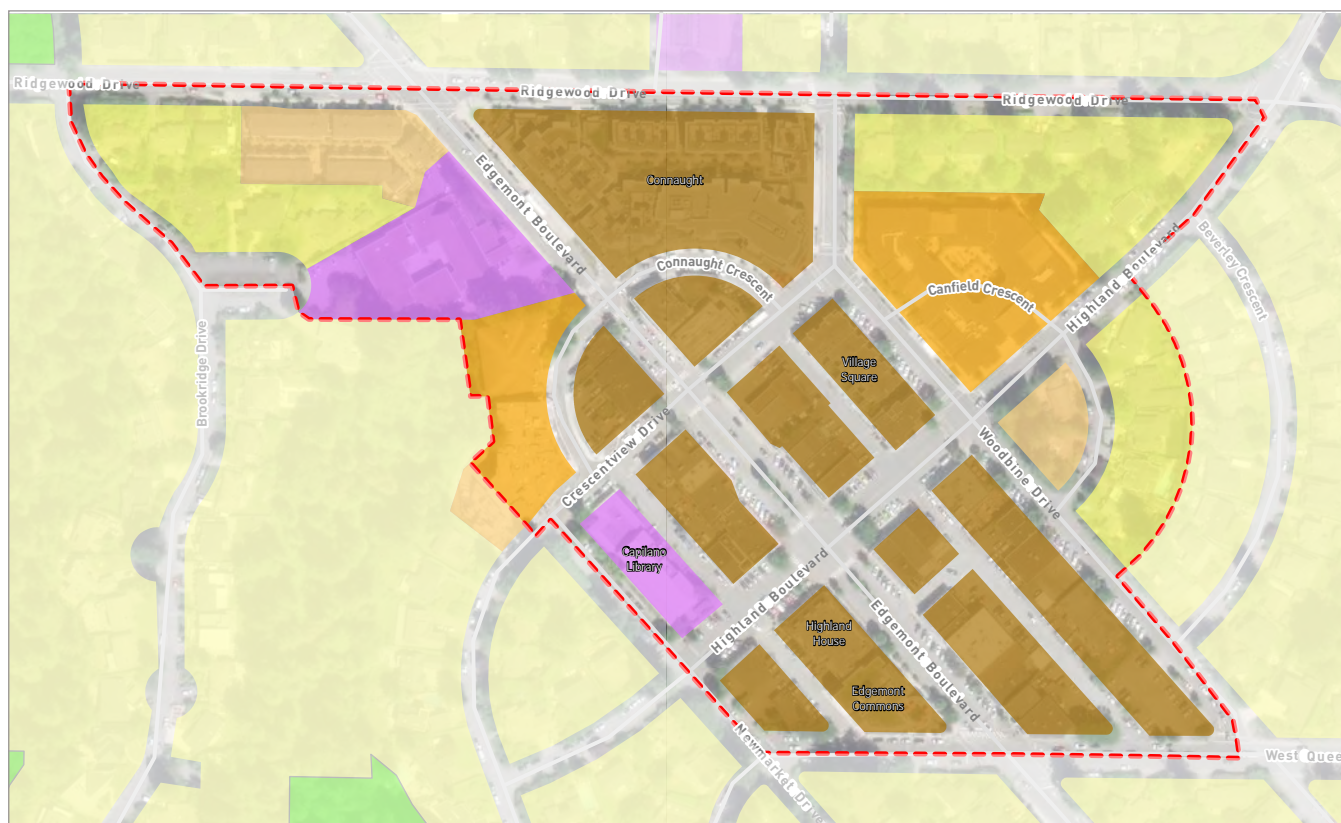
- + The Village Centre is well connected via bike lanes and transit routes increasing the accessibility of the Village Centre and decreasing the reliance on personal automobiles to access employment or services.
- + Edgemont is located close to Grouse Mountain, a major focal point of tourism on the North Shore. Ancillary tourist services could locate here.
- + Leverage strong sense of place through design and partnerships with local businesses to invest in projects, programs and events that continue to attract residents and customers to the area as a unique destination.



### CHALLENGES

- Edgemont is somewhat removed from major thoroughfares.
- The current transportation network poses significant challenges in terms of increased traffic levels throughout the area delaying the movement of people and goods through and around the Village Centre.
- Relatively low existing and permitted density of residential areas surrounding the Village Centre may result in modest residential population growth, limiting the demand for local services compared to other parts of the District.
- Must be careful not to lose unique main street identity as the area intensifies, which may limit the type of development and businesses that can be accommodated.

## + Official Community Plan Land Use Designation



Source: District of North Vancouver

Sub-area Boundary

OCP Class

COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3

INSTITUTIONAL

PARKS, OPEN SPACE, AND NATURAL AREAS

RESIDENTIAL LEVEL 2: RESIDENTIAL

RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY

RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT

## + Developable Area by OCP Designation (2023)

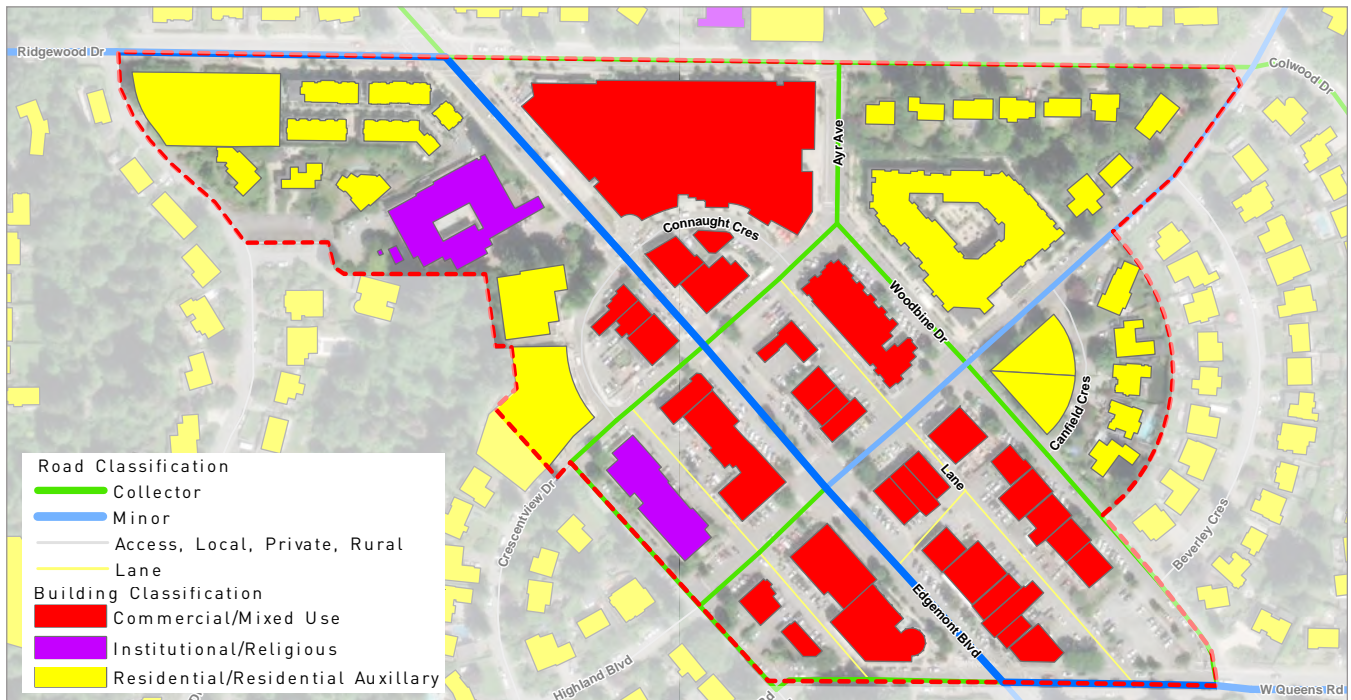
Non-Employment Land	ha	Employment Land	ha
Roads	4 ha	Commercial/ Mixed Use	3 ha
Parks and Open Space	-	Institutional	1 ha
Residential	3 ha	Industrial	-
<b>Total Employment Land*</b>			<b>4 ha</b>
<b>Total Developable Area*</b>			<b>7 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver



## + Employment Space



Source: District of North Vancouver

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	131,500	48%	210
Mixed Use	116,200	43%	190
Institutional	25,000	9%	30
Industrial	-	-	-
Auxiliary	-	-	-
<b>Total Non-Residential Floor Space*</b>	<b>250,200</b>	<b>100%</b>	<b>430</b>

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

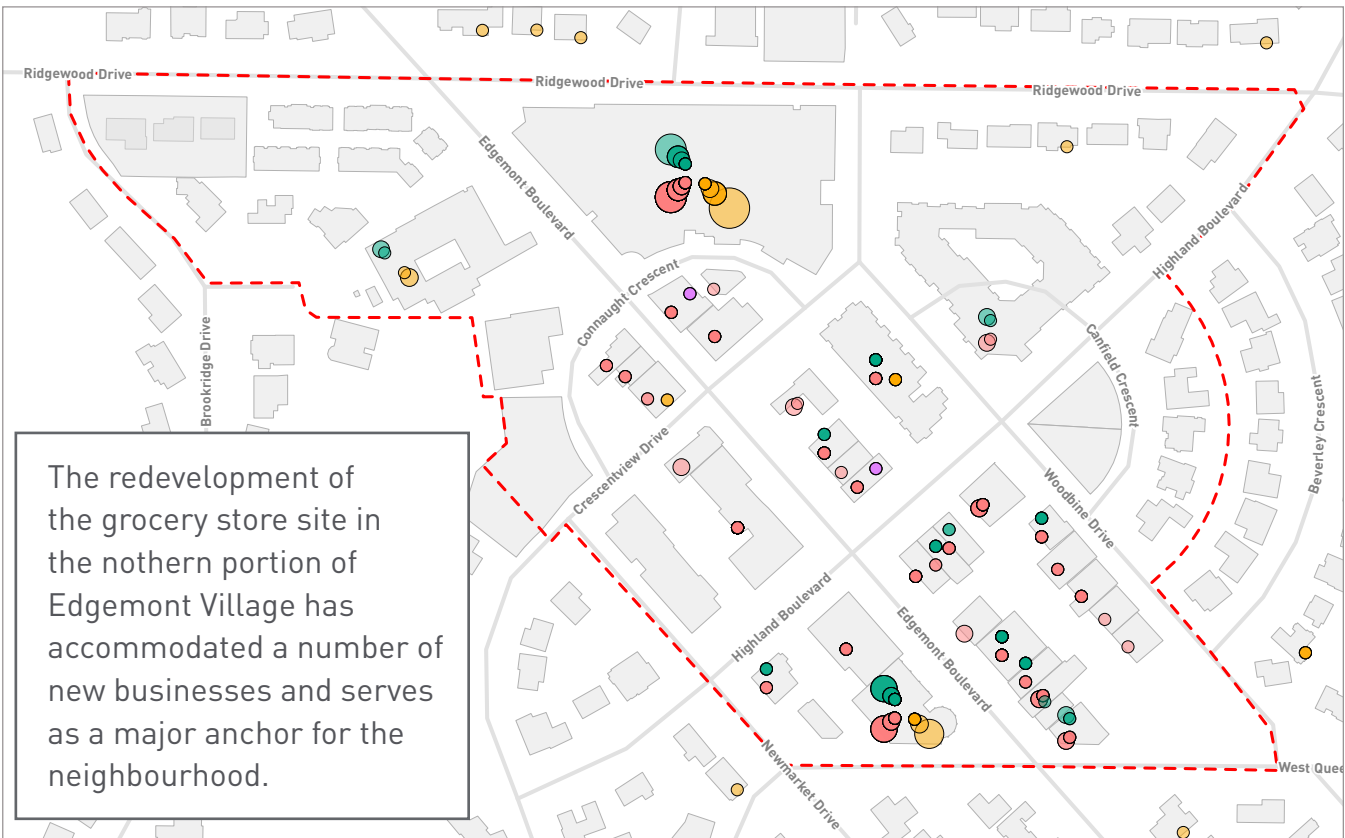
## + Projected Employment Demand-2021-2051

	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	41,000 to 69,000	160 to 210
Institutional	25,000 to 22,000	45 to 65
Industrial/ Auxiliary	-	-

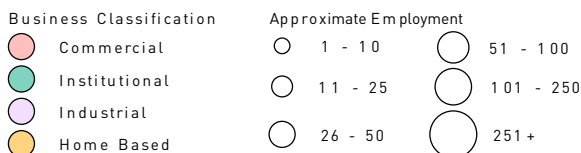
Source: B&A & Urban Systems, based on data adapted from Metro Vancouver



## + 2023 Business License Locations



Source: District of North Vancouver



## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	116
Institutional	68
Industrial	6
Home Based	39
<b>Total</b>	<b>229</b>

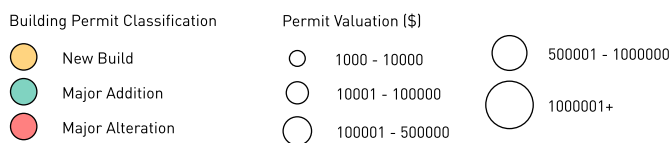
Source: District of North Vancouver



## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver



## + Non-Residential Building Permit Activity (2011-2023) + District Owned Land

	Permits Issued	Value**
<b>New Build</b>	2	\$23,231,000
<b>Major Addition</b>	4	\$861,000
<b>Major Alteration</b>	26	\$12,688,000
<b>Total*</b>	32	\$36,781,000

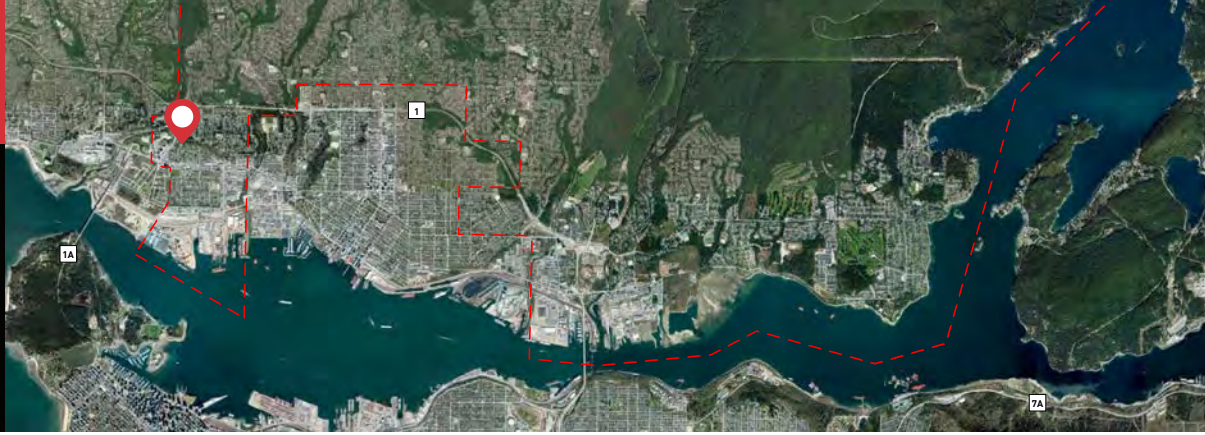
\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

Source: District of North Vancouver







## Lions Gate Village Centre

Located near the intersection of Marine Drive and Capilano Road, Marine Drive Village Centre acts as a gateway into the District from West Vancouver and the Lions Gate Bridge. Also known as Lower Capilano, this area is an OCP designated Village Centre and one of two Frequent Transit Development Areas in the DNV. Redevelopment in Lions Gate has been catalyzed around the new Lions Gate Community Recreation Centre that opened in April 2022. As an emerging area planned for intensification, significant growth is expected in Lions Gate Village Centre including the proposed redevelopment of existing retail spaces to provide 100,000 ft<sup>2</sup> of new commercial space. A significant concentration of hotels and motels are found in the area on account of its location and ease of access to other tourism related areas of the North Shore.



### OPPORTUNITIES

- + The Village Centres' location near the Lion's Gate Bridge and Highway 1 positions it to serve as a gateway between DNV, the broader North Shore, and the City of Vancouver.
- + The area can leverage its proximity to Grouse Mountain, along with its existing stock of hotel lodging, to create further momentum to attract tourism related business opportunities.
- + The recent opening of the Lions Gate Community Recreation Centre exemplifies the type of redevelopment desired for the area and has increased the type of public amenities and community facing services for the area increasing its desirability.
- + Recently announced Bus Rapid Transit (BRT) upgrades will create additional opportunity to attract development, customers and new business to the area.



### CHALLENGES

- Commercial uses in the Village Centre will need to compete with well-established commercial hubs located along Marine Dr, including the Park Royal Shopping Centre in nearby West Vancouver.
- The redevelopment of the remaining motel and auto-oriented businesses along Capilano Rd and Marine Dr may result in a net loss of tourist accommodations if sufficient commercial replacement is not achieved.
- At grade commercial opportunities face competition between retail and population-serving office uses, making it difficult to ensure engaging retail streets.
- Arrival of BRT may trigger additional residential redevelopment that may out-compete or limit amount of new non-residential space under new provincial legislation.

### + Official Community Plan Land Use Designation



Source: District of North Vancouver

**Sub-area Boundary**

**OCP Class**

- COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3
- INSTITUTIONAL
- LIGHT INDUSTRIAL
- PARKS, OPEN SPACE, AND NATURAL AREAS
- RESIDENTIAL LEVEL 2: DETACHED
- RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY
- RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT



### + Developable Area by OCP Designation (2023)

Non-Employment Land	ha
Roads	6ha
Parks and Open Space	0.5 ha
Residential	8 ha
Employment Land	
Commercial/ Mixed Use	7 ha
Institutional	-
Industrial	-
<b>Total Employment Land*</b>	<b>7 ha</b>
<b>Total Developable Area*</b>	<b>15 ha</b>

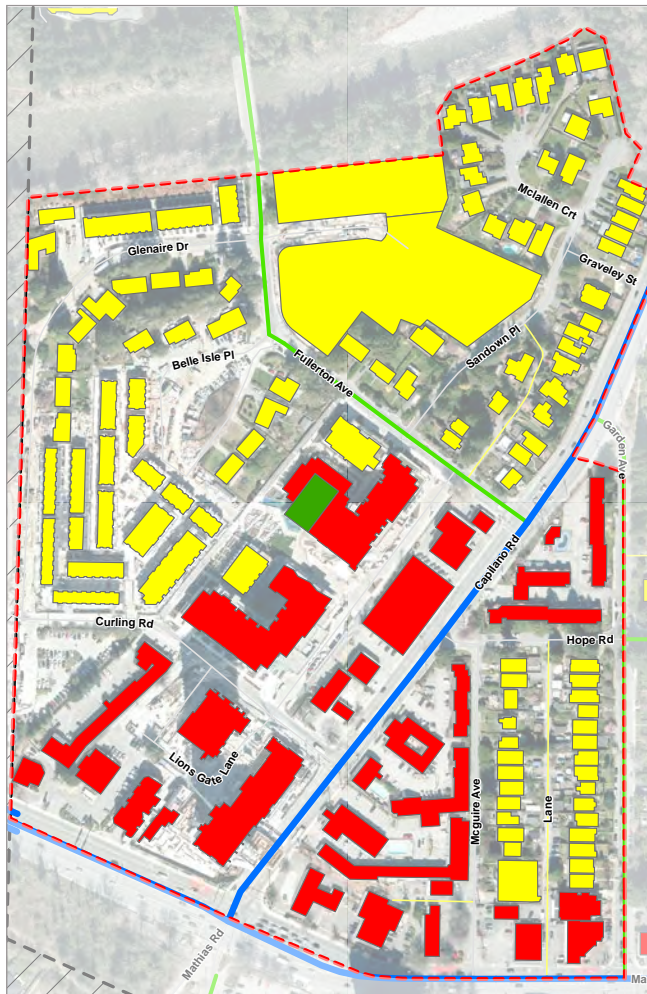
\*Figures may not sum to total due to rounding

Source: District of North Vancouver

The transformation of the area from a commercial gateway into a complete community creates new opportunities for population-serving businesses, but may also squeeze out some tourism and lodging-focused businesses.



## + Employment Space



Source: District of North Vancouver

Road Classification		Building Classification	
<span style="color: blue;">—</span>	Major	<span style="color: red;">■</span>	Commercial/Mixed Use
<span style="color: lightblue;">—</span>	Minor	<span style="color: lightblue;">■</span>	Industrial/Auxiliary
<span style="color: green;">—</span>	Collector	<span style="color: purple;">■</span>	Institutional/Religious
<span style="color: grey;">—</span>	Access, Local, Private, Rural Lane	<span style="color: yellow;">■</span>	Residential/Residential Auxiliary
		<span style="color: green;">■</span>	Recreation

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	240,100	67%	390
Mixed Use	119,800	33%	190
Institutional	-	-	-
Industrial	-	-	-
Auxiliary	-	-	-
<b>Total Non-Residential Floor Space*</b>	<b>359,900</b>	<b>100%</b>	<b>580</b>

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

## + Projected Employment Demand-2021-2051

	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	82,000 to 124,000	275 to 355
Institutional	22,000 to 66,000	40 to 120
Industrial/ Auxiliary	-	-

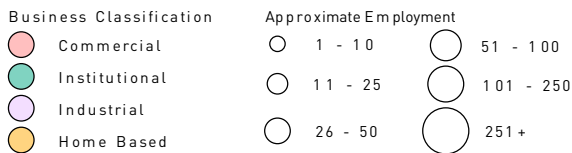
Source: B&A & Urban Systems, based on data adapted from Metro Vancouver



## + 2023 Business License Locations



Source: District of North Vancouver



## + Business Licenses by Type (2023)

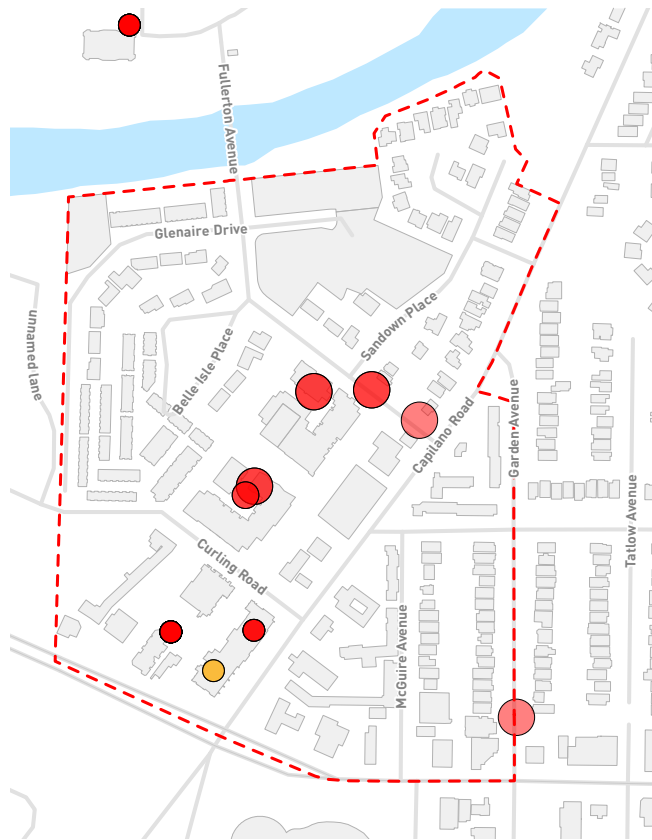
	Licenses Issued
Commercial	51
Institutional	29
Industrial	38
Home Based	19
<b>Total</b>	<b>137</b>

Source: District of North Vancouver





## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

## + District Owned Land



Source: District of North Vancouver

### Building Permit Classification

- New Build
- Major Addition
- Major Alteration

### Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

- District Owned Land
- Parcel Fabric

## + Non-Residential Building Permit Activity (2011-2023)

	Permits Issued	Value**
<b>New Build</b>	2	\$800,000
<b>Major Addition</b>	-	-
<b>Major Alteration</b>	39	\$36,309,000
<b>Total *</b>	41	\$37,109,000

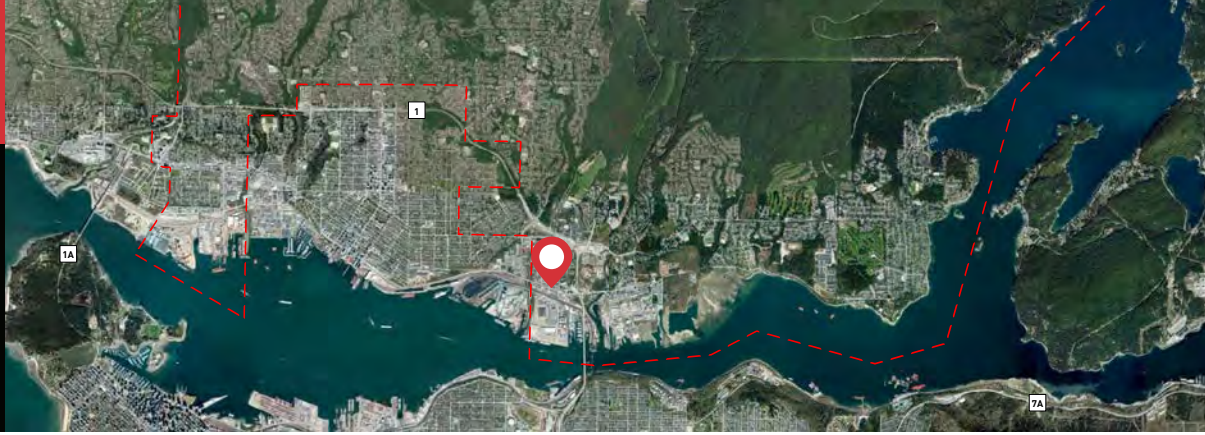
\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

Source: District of North Vancouver







## Lynn Creek Town Centre

Lynn Creek Town Centre, also known as Lower Lynn, is one of four key OCP designated growth centres, and one of two designated Town Centres in the District. It is home to a diverse mix of traditional industrial and population serving commercial businesses. Centrally located at the Second Narrows bridgehead and connected to Lower Lonsdale via Main Street/Low Level Road, Lower Lynn is accessible to Phibbs Exchange and frequent transit, significant parks and natural amenities, employment lands and regional commercial uses. The Lynn Creek Town Centre plan encourages economic development through the protection and intensification of light industrial uses, and a modest expansion of the local serving commercial uses. Recent infrastructure improvements to nearby highway interchanges and transit hubs have the potential to make the area more attractive as a place for businesses to invest, but will also bring increased competition from residential uses, which will be permitted to an increased degree in the area surrounding Phibbs Exchange as a result of recent provincial policy.



### OPPORTUNITIES

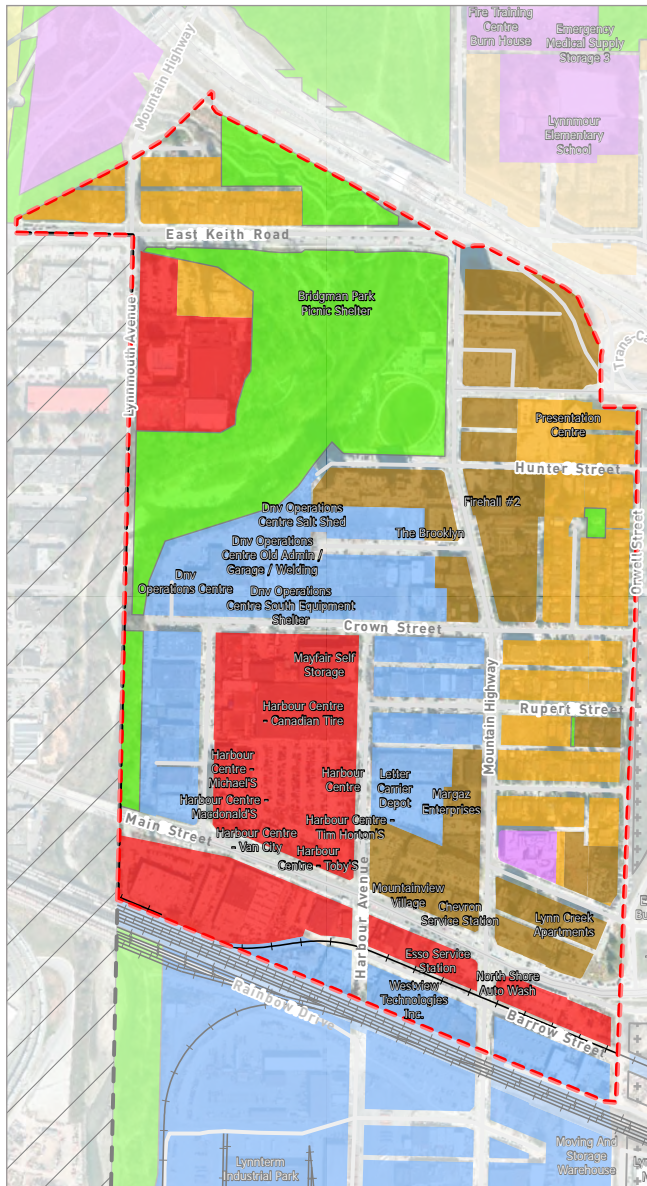
- + Local businesses benefit from proximity and access to major commuter and goods movement routes (Highway 1, Main Street, Mountain Highway), the Port of Vancouver, and transit infrastructure (Phibbs Exchange).
- + Recent upgrades to the Highway 1 interchange and Phibbs Exchange are improving access and vehicle movement to the area.
- + The planned intensification of residential uses in the area has the potential to increase the demand for local services.
- + Design and build for activated public spaces, plazas, and streets during the redevelopment to create an attractive sense of place.



### CHALLENGES

- The older nature of the industrial building stock in the area may not meet the needs of modern businesses.
- The introduction of intensive residential uses in such close proximity to the existing employment lands creates more opportunities for conflict and potential conversion speculation.
- The small and fractured parcel and road network in the industrial area limits opportunities for certain forms of industrial redevelopment and intensification.
- Redevelopment of commercial spaces for mixed-residential uses has the risk of net loss of employment space and can make it difficult to maintain a vibrant mix of at grade retail uses.

## + Official Community Plan Land Use Designation



Source: District of North Vancouver

## + Developable Area by OCP Designation (2023)

Non-Employment Land	ha
Roads	14.8 ha
Parks and Open Space	11 ha
Residential	8 ha
Employment Land	
Commercial/ Mixed Use	19 ha
Institutional	0.5 ha
Industrial	10 ha
<b>Total Employment Land*</b>	<b>63 ha</b>
<b>Total Developable Area*</b>	<b>37 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver

Lower Lynn Town Centre features a well-established cluster of industrial and population serving commercial uses oriented towards both local and regional customers. The introduction of mixed-use developments to the west side of Mountain Highway may create pressure on the remaining employment uses, particularly for industrial businesses.

Sub-area Boundary

OCP Class

COMMERCIAL

COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3

INDUSTRIAL

LIGHT INDUSTRIAL

INSTITUTIONAL

PARKS, OPEN SPACE, AND NATURAL AREAS

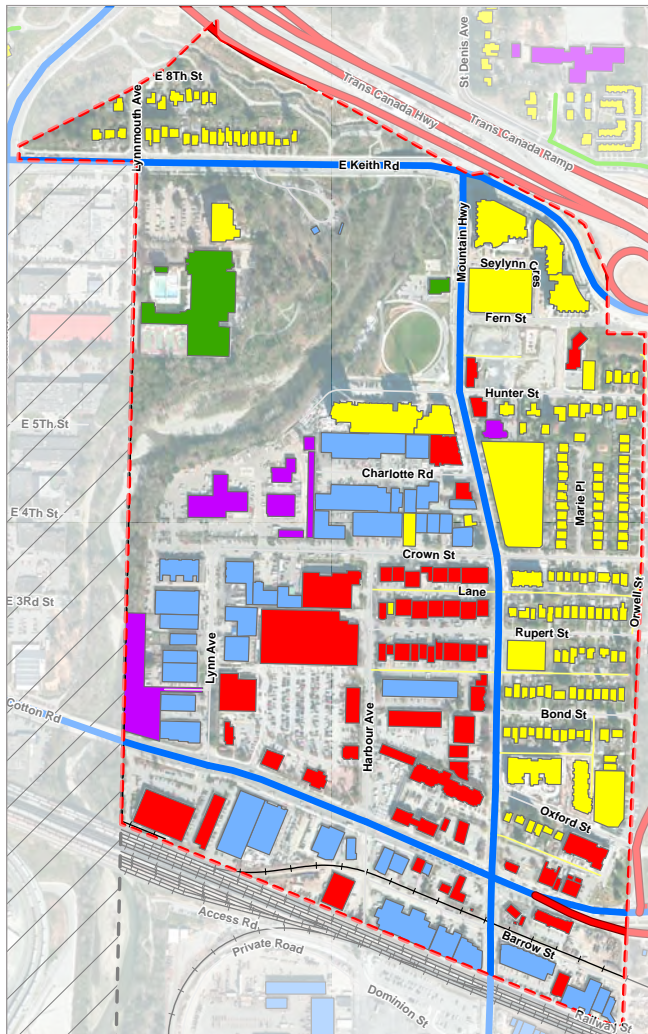
RESIDENTIAL LEVEL 2: DETACHED

RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY

RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT



## + Employment Space



Source: District of North Vancouver

### Road Classification

- Highway
- Major
- Minor
- Collector
- Access, Local, Private, Rural Lane

### Building Classification

- Commercial/Mixed Use
- Industrial/Auxiliary
- Institutional/Religious
- Residential/Residential Auxiliary
- Recreation

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	614,200	36%	990
Mixed Use	63,000	4%	100
Institutional	183,700	11%	300
Industrial	822,300	49%	920
Auxiliary	1,200	0%	-
<b>Total Non-Residential Floor Space*</b>	<b>1,684,357</b>	<b>100%</b>	<b>2,310</b>

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

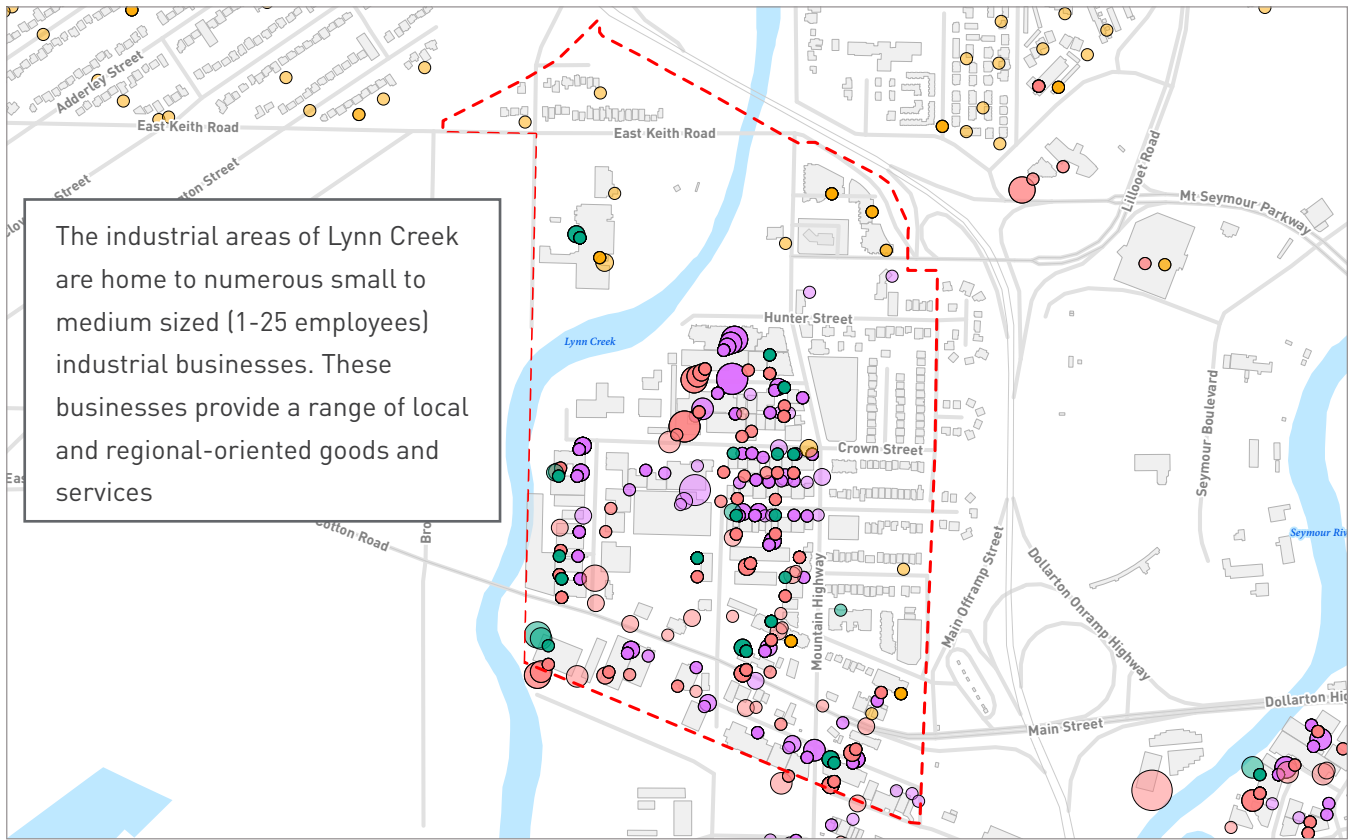
## + Projected Employment Demand-2021-2051

	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	137,000 to 206,000	480 to 615
Institutional	44,000 to 88,000	115 to 195
Industrial/ Auxiliary	171,000 to 239,000	400 to 490

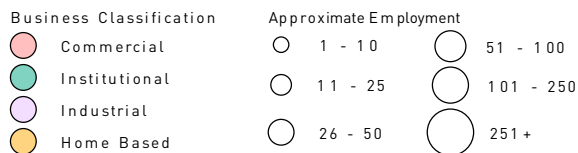
Source: B&A & Urban Systems, based on data adapted from Metro Vancouver



## + 2023 Business License Locations



Source: District of North Vancouver



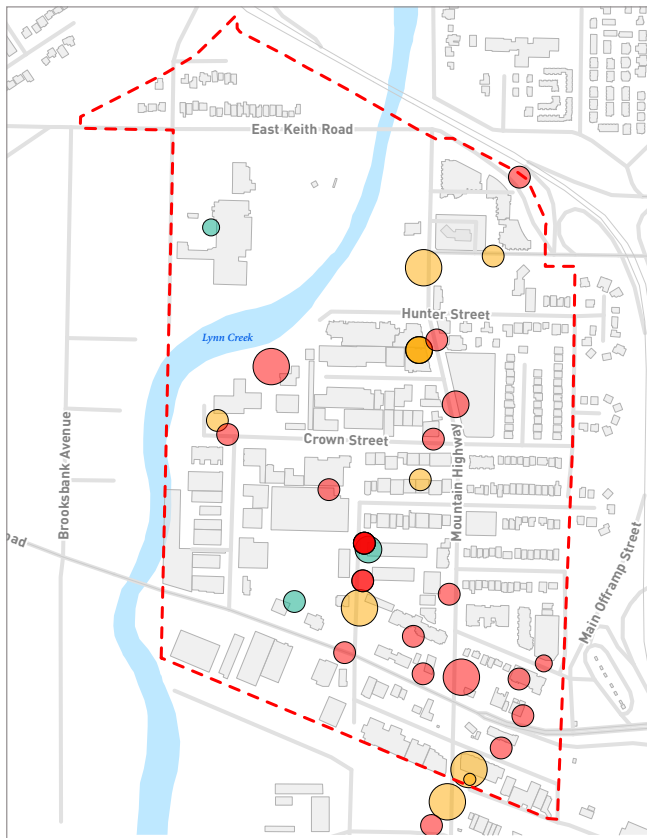
## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	213
Institutional	104
Industrial	198
Home Based	31
<b>Total</b>	<b>546</b>

Source: District of North Vancouver

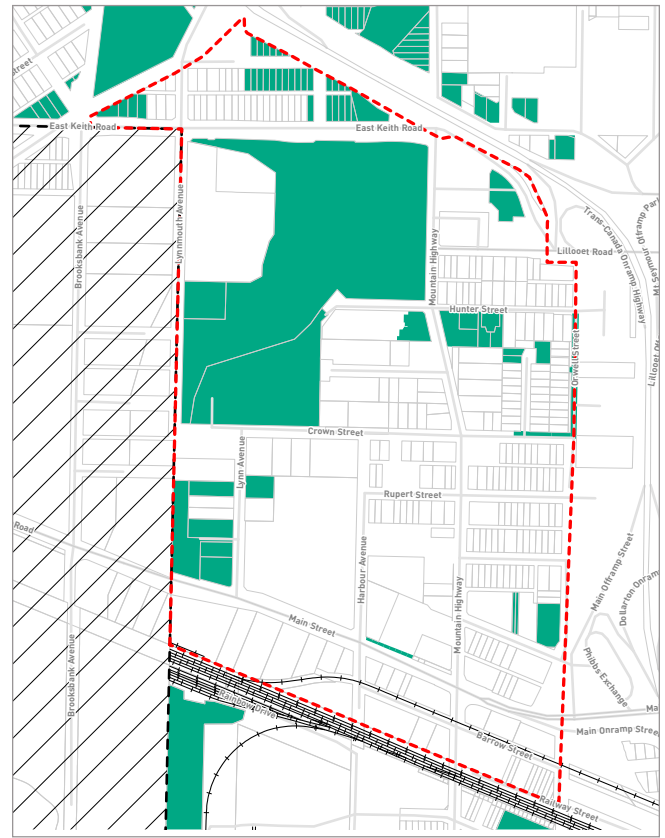


## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

## + District Owned Land



Source: District of North Vancouver

### Building Permit Classification

- New Build
- Major Addition
- Major Alteration

### Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

- District Owned Land
- Parcel Fabric

## + Non-Residential Building Permit Activity (2011-2023)

	Permits Issued	Value**
<b>New Build</b>	12	\$36,280,000
<b>Major Addition</b>	3	\$955,000
<b>Major Alteration</b>	31	\$59,526,000
<b>Total*</b>	46	\$96,760,000

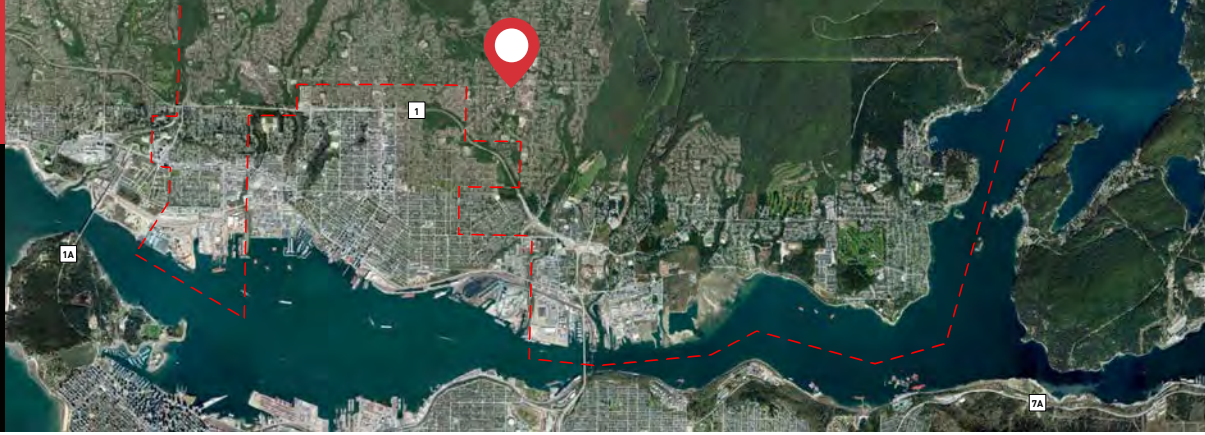
\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

Source: District of North Vancouver

While a large portion of the District owned parcels in the area are comprised of parks and open space, it also includes some significant institutional employment uses, including the Municipal Operations Centre at the end of Crown Street. Smaller District-owned parcels interspersed across the area may also present opportunities for strategic redevelopment.





## Lynn Valley Centre

Lynn Valley Town Centre, is one of two Town Centres identified in the District of North Vancouver's Official Community Plan (OCP). This mixed residential and commercial employment node is oriented around the Lynn Valley Centre shopping mall, which sits at the confluence of Lynn Valley Road, Mountain Highway and 29th Street E. By nature of its location between Highway 1 and the residential neighbourhoods of Upper Lynn Creek, the area serves as both a gateway and primary service center for the surrounding community. The OCP vision for Lynn Valley builds on its existing commercial core with recreation and civic uses, a mix of new residential, commercial and employment uses, park and community space and green building design and infrastructure to facilitate the development of a complete community.

### +

#### OPPORTUNITIES

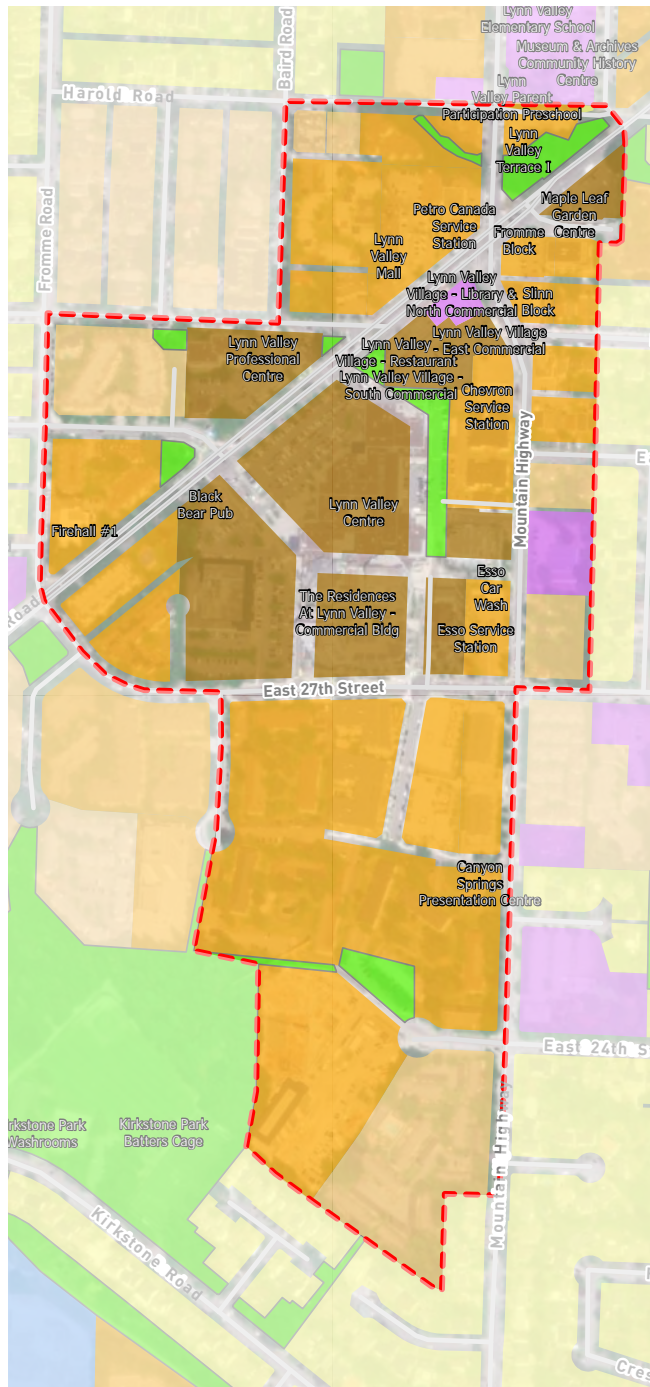
- + The presence of numerous institutional employers and services just beyond the boundaries of Lynn Valley Town Centre create a supplementary draw to the area that will lead to additional demand over time as the surrounding neighbourhoods mature and grow.
- + Recent and planned transit improvements in the area make it a prime location for Transit Oriented Development increasing the accessibility of the area and services without the need for a personal vehicle.
- + Re-development of the existing properties presents options to design and build for activated public spaces, increasing sense of place and business attraction.

### -

#### CHALLENGES

- Location of the Lynn Valley Town Centre lacks the accessibility and broader commuter shed of other retail centres on the North Shore, limiting its broader regional appeal.
- The area's current employment mix is primarily comprised of population serving uses, with limited attraction as a destination for customers beyond the immediate neighbourhood.
- Mixed residential redevelopment of commercial parcels may result in a net decrease in employment space over time.
- Competition for space is resulting in numerous office-type uses occupying prime at-grade retail spaces.

## + Official Community Plan Land Use Designation



Source: District of North Vancouver

## + Developable Area by OCP Designation (2023)

Non-Employment Land	ha
Roads	15 ha
Parks and Open Space	1 ha
Residential	18 ha
Employment Land	
Commercial/ Mixed Use	6 ha
Institutional	1 ha
Industrial	-
<b>Total Employment Land*</b>	<b>34 ha</b>
<b>Total Developable Area*</b>	<b>25 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver



Sub-area Boundary

OCP Class

COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3  
 INSTITUTIONAL  
 LIGHT INDUSTRIAL

PARKS, OPEN SPACE, AND NATURAL AREAS

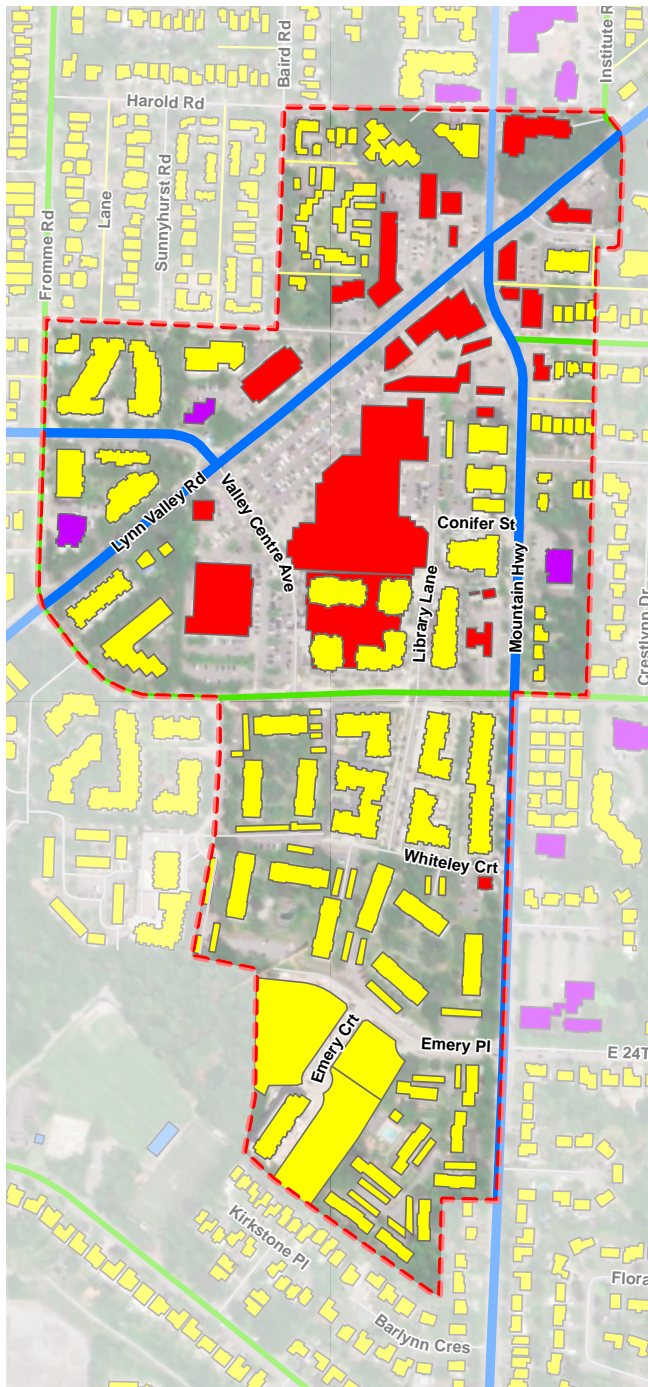
RESIDENTIAL LEVEL 2: DETACHED

RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY

RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT



## + Employment Space



Source: District of North Vancouver

### Road Classification

- Major
- Minor
- Collector
- Access, Local, Private, Rural Lane

### Building Classification

- Commercial/Mixed Use
- Industrial/Auxiliary
- Institutional/Religious
- Residential/Residential Auxiliary
- Recreation

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	439,000	89%	710
Mixed Use	42,100	8%	70
Institutional	14,500	3%	20
Industrial	-	-	-
Auxiliary	-	-	-
<b>Total Non-Residential Floor Space*</b>	<b>495,600</b>	<b>100%</b>	<b>800</b>

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

## + Projected Employment Demand-2021-2051

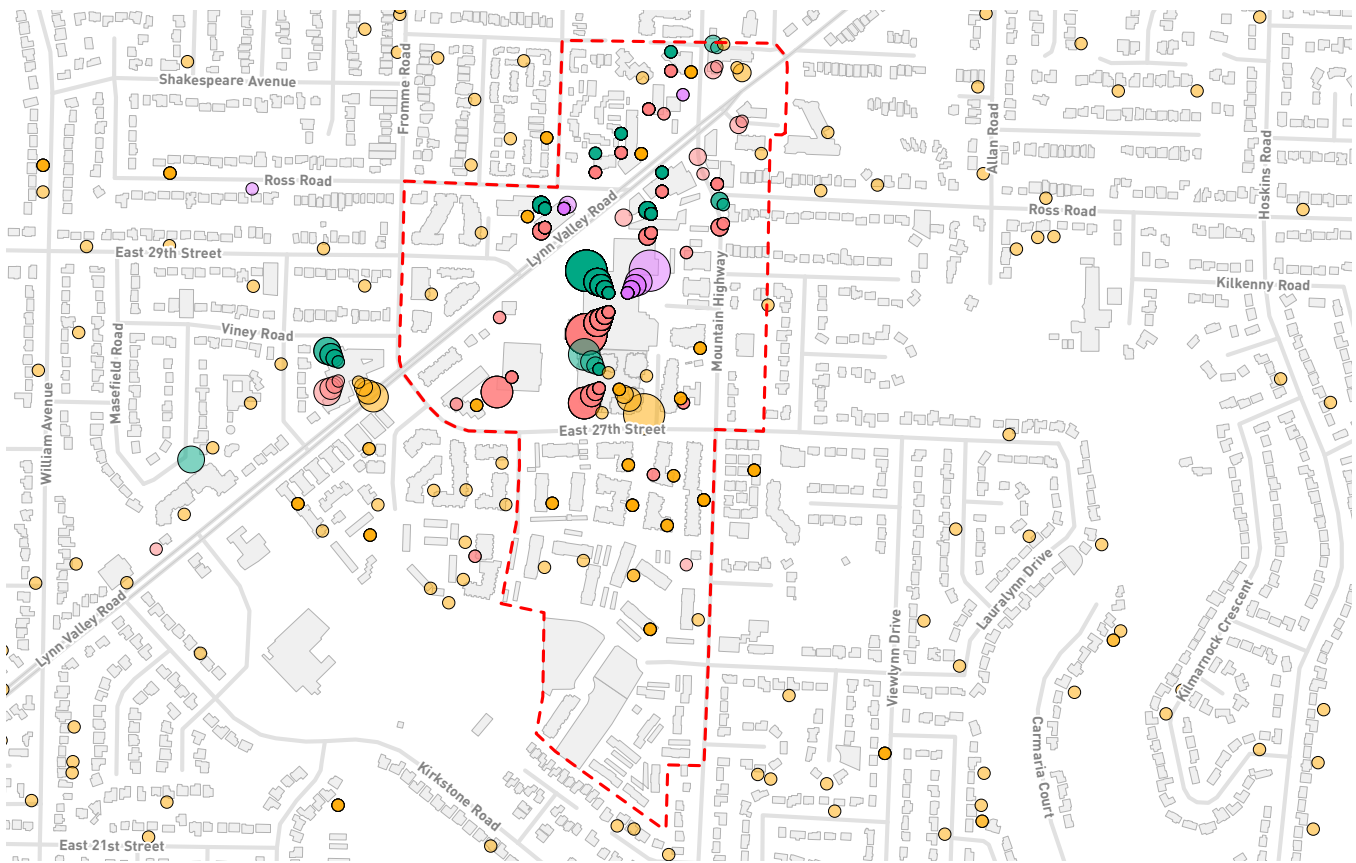
	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	82,000 to 110,000	310 to 365
Institutional	22,000 to 66,000	45 to 125
Industrial/ Auxiliary	-	-

Source: B&A & Urban Systems, based on data data adapted from Metro Vancouver

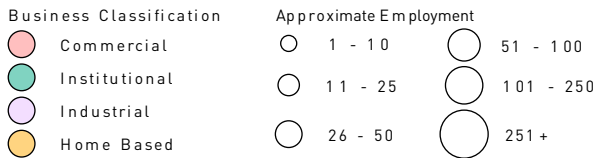
Commercial employment opportunities are concentrated in the few designated mixed-use parcels along Lynn Valley Road and west of Mountain Highway, north of 27th Street. These sites represent prime opportunities for growth via intensification, but could potentially experience a net decrease in employment space if redeveloped for mixed-residential uses without clear policy requirements.



### + 2023 Business License Locations



Source: District of North Vancouver



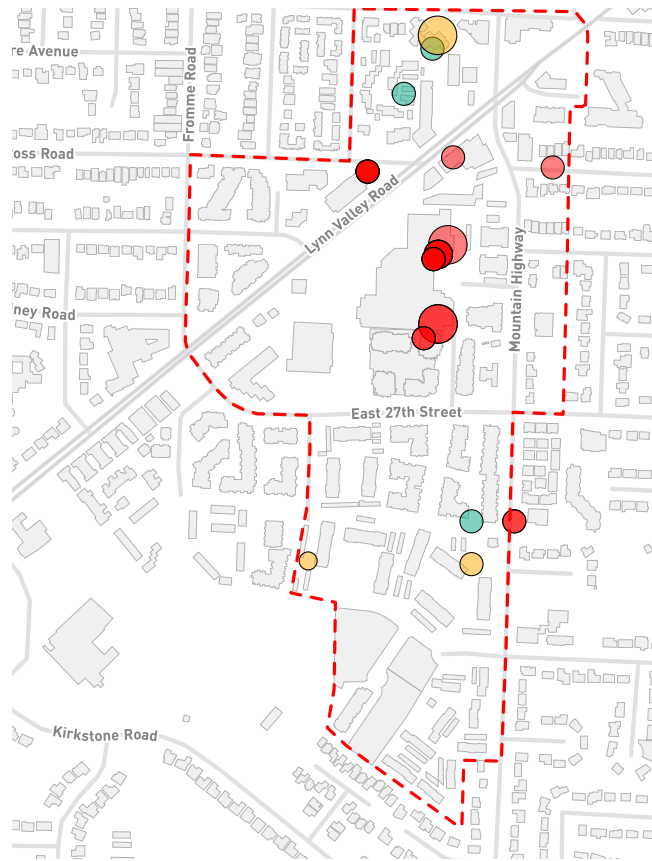
### + Business Licenses by Type (2023)

	Licenses Issued
Commercial	121
Institutional	91
Industrial	39
Home Based	60
<b>Total</b>	<b>311</b>

Source: District of North Vancouver

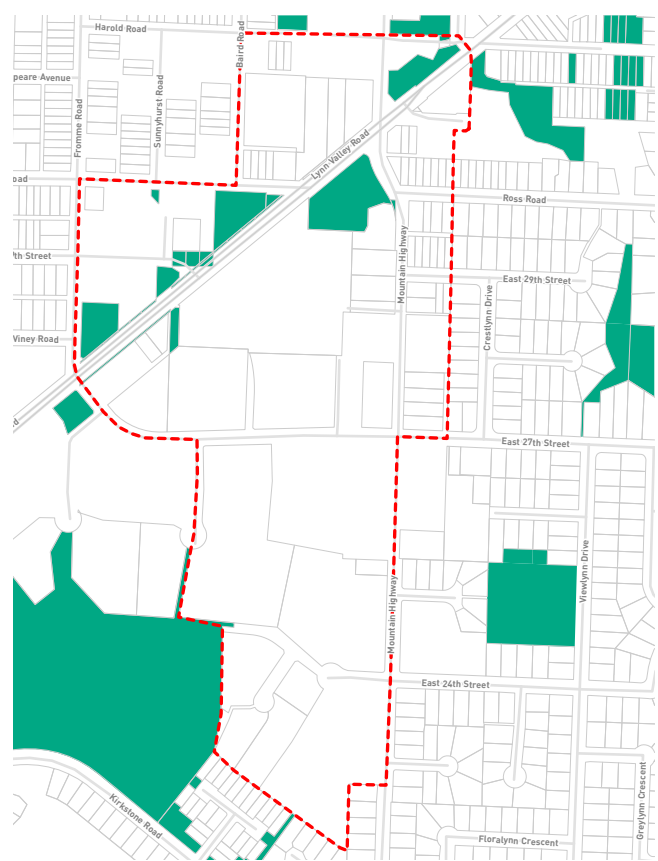
The Lynn Valley Centre mall serves as traditional retail centre to the sub-area and the surrounding community. It serves as home to nearly 50 businesses and has seen a healthy level of activity following the pandemic.

## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

## + District Owned Land



Source: District of North Vancouver

### Building Permit Classification

- New Build
- Major Addition
- Major Alteration

### Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

- District Owned Land
- Parcel Fabric

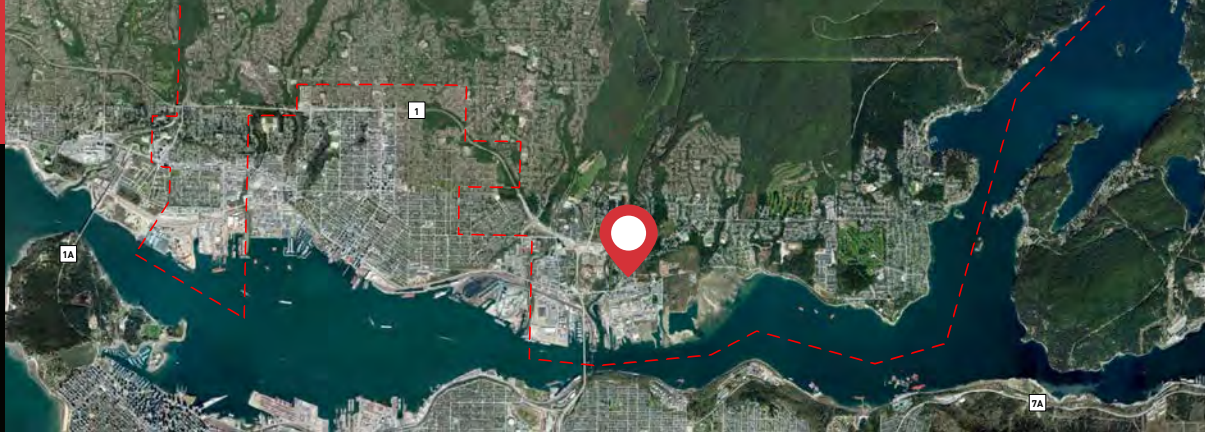
## + Non-Residential Building Permit Activity (2011-2023)

	Permits Issued	Value**
<b>New Build</b>	2	\$430,000
<b>Major Addition</b>	3	\$700,000
<b>Major Alteration</b>	22	\$18,488,000
<b>Total*</b>	27	\$19,618,000

\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

The District of North Vancouver owns many sites that front prominently onto Lynn Valley Road, granting the municipality considerable opportunity to shape the type of future development it would like to encourage in the area.



## Maplewood Village Centre

Maplewood Village Centre is an emergent mixed use neighbourhood located to the east of the Second Narrows Bridge. The area is characterized by a mix of low-rise apartments, purpose built rental townhouses, single family homes, commercial and mixed-use developments. Signs of the industrial history the area remain today through the southeast portion of the neighbourhood, along with the predominantly industrial functions located just south of the Dollarton Highway. The east side of the Village Centre is largely undeveloped with lands predominantly owned by the District and an undeveloped former gravel pit. Redevelopment of the area for higher densities has occurred somewhat more gradually than that of other Village Centres in recent years. The Maplewood Implementation Plan intends to address this by providing a greater flexibility in use and form allowing introducing the Light Industrial Artisan district as a live-work land use buffer between the residential uses to the north and west and the predominantly industrial uses to the south.



### OPPORTUNITIES

- + The Maplewood Village Centre and Innovation District Implementation Plan & Guidelines provides clear direction for redevelopment, including protection, retention and reinvestment in employment generating uses.
- + Proximity to Maplewood Industrial and the Statlöv District provide an opportunity for synergies and comprehensive development.
- + Proximity to Capilano University can offer potential partnerships between innovative industrial employment opportunities and the University.
- + Population growth in T'sleil Watuth lands to the east may lead to increased demand for goods and services at this location.

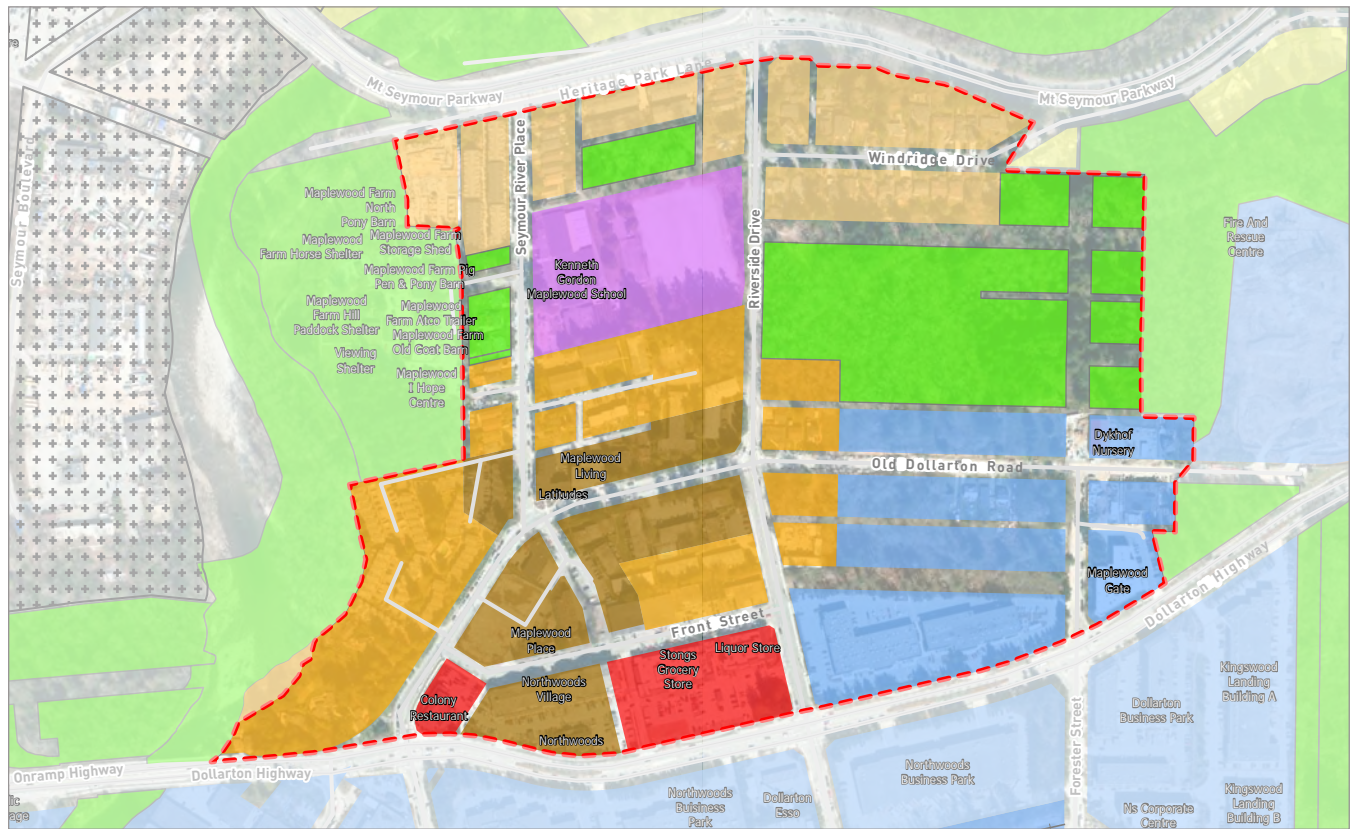


### CHALLENGES

- The neighbourhood's location in relation to other population and service centres on the North Shore features less accessibility than other major commercial hubs.
- Local businesses have indicated an insufficient amount of local foot traffic in the area to support their operations.
- Environmental considerations for the area include both coastal and river floodplains. These constraints require additional technical studies to support development and may restrict the type or extent of development proposed.
- The vacant industrial designated lands east of Riverside Drive have seen limited investment activity, despite high demand for industrial space. A review of current industrial policies may be warranted.



## + Official Community Plan Land Use Designation



Source: District of North Vancouver

**Sub-area Boundary**

**OCP Class**

COMMERCIAL

COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3

INDUSTRIAL

LIGHT INDUSTRIAL

INSTITUTIONAL

PARKS, OPEN SPACE, AND NATURAL AREAS

RESIDENTIAL LEVEL 2: DETACHED

RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY

RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT

First Nations Reserve

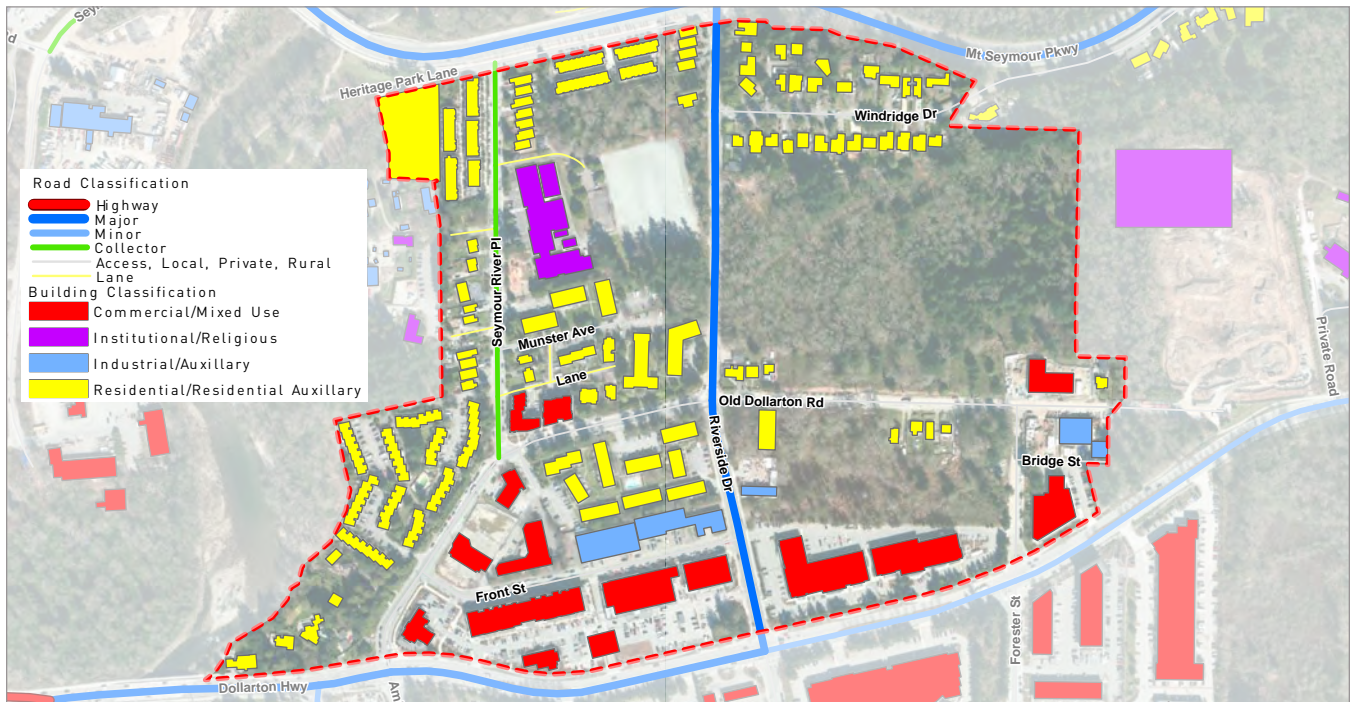
## + Developable Area by OCP Designation (2023)

Non-Employment Land	ha	Employment Land	ha
Roads	8 ha	Commercial/ Mixed Use	5 ha
Parks and Open Space	4 ha	Institutional	2 ha
Residential	10 ha	Industrial	5 ha
<b>Total Employment Land *</b>			<b>12 ha</b>
<b>Total Developable Area*</b>			<b>22 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver

## + Employment Space



Source: District of North Vancouver

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Employment
Commercial	215,700	53%	350
Mixed Use	58,800	15%	100
Institutional	100	100	70
Industrial	89,100	22	100
Auxiliary	-	-	-
Total Non-Residential Floor Space*	403,700	100%	620

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

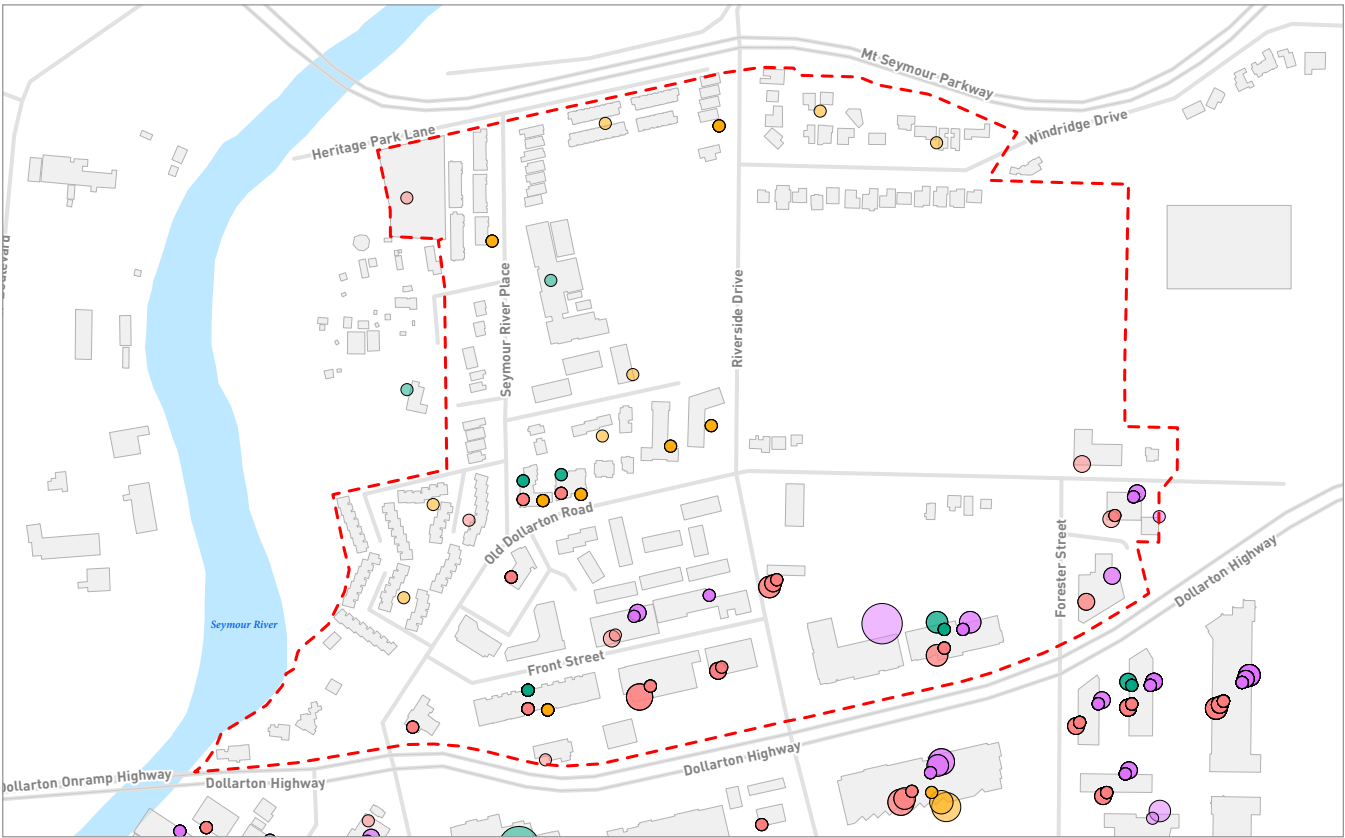
The Maplewood Implementation Plan sets a goal of 1,500 net new residential units and an additional 9,9290 m<sup>2</sup> (100,000 ft<sup>2</sup>) of new commercial space by 2030. This means that the current amount of commercial space would need to increase by 50% in the next seven years.

## + Projected Employment Demand-2021-2051

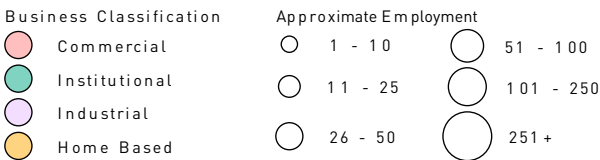
	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	82,000 to 110,000	245 to 300
Institutional	22,000 to 66,000	50 to 130
Industrial/ Auxiliary	17,000 to 102,000	40 to 155

Source: B&A & Urban Systems, based on data adapted from Metro Vancouver

# + 2023 Business License Locations



Source: District of North Vancouver



## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	56
Institutional	27
Industrial	19
Home Based	35
<b>Total</b>	<b>137</b>

Source: District of North Vancouver





## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

### Building Permit Classification

- New Build
- Major Addition
- Major Alteration

### Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

## + Non-Residential Building Permit Activity (2011-2023)

	Permits Issued	Value**
<b>New Build</b>	12	\$42,555,000
<b>Major Addition</b>	5	\$7,266,000
<b>Major Alteration</b>	25	\$8,019,000
<b>Total*</b>	42	\$57,840,000

\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

Source: District of North Vancouver



# + District Owned Land



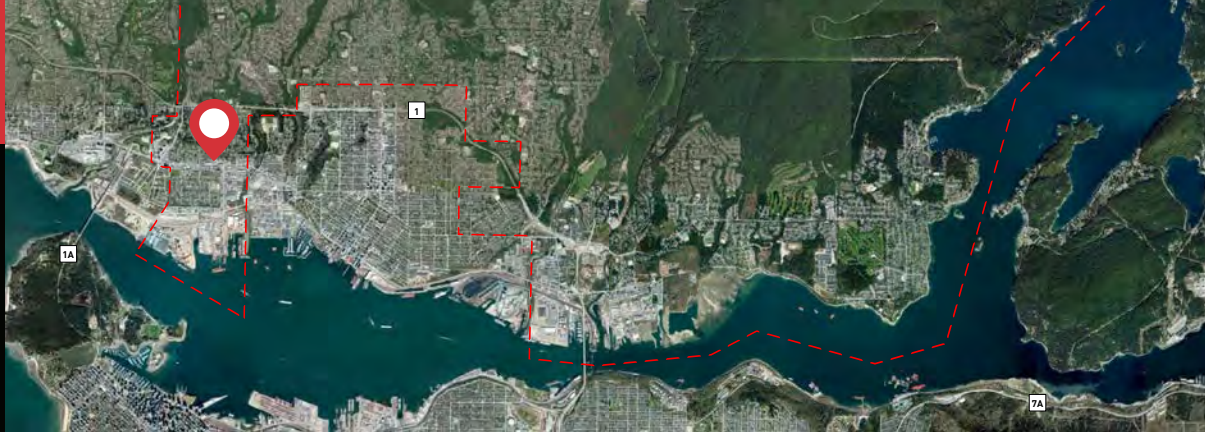
Source: District of North Vancouver

- District Owned Land
- Parcel Fabric



The District owns a significant portion of the undeveloped lands located to the east of Riverside Drive. While some of these are set aside from parks and open space uses, the others present a unique opportunity for additional commercial and industrial uses.





## Marine Drive Commercial

While the Marine Drive Commercial sub-area is not an officially designated OCP Village Centre, the concentration of commercial businesses and future growth prospects along this primary corridor through the District's west side warrant its inclusion in this study. This commercial corridor operates as a primary gateway into both the District and the City of North Vancouver and presents a transitional commercial zone between the residential neighbourhoods to the north and the industrial lands to the south. It also has been identified as a priority route for future Bus Rapid Transit service as part of TransLink's most recent round of planned regional transportation network upgrades. The area is home to hundreds of businesses across a range of functions and services that remain vibrant and nearly fully occupied, despite the aging nature of many of the commercial and industrial buildings. At the same time, the size of the parcels along the main corridor make the area a prime candidate for consolidation and mixed-use redevelopment as the area continues to mature and grow with future transit infrastructure upgrades.



### OPPORTUNITIES

- + Leverage the area's physical location as primary corridor between key centres on the North Shore continue to attract a range of prominent local and region serving businesses.
- + Support the introduction of employment spaces that take advantage of planned BRT upgrades to appeal to customers using diverse modes of transportation.
- + Plan and design to expand commercial uses beyond current footprint as residential and other amenities are introduced to the area through mixed use redevelopment.



### CHALLENGES

- Mixed use redevelopment runs the risk of net loss of employment space as has been the case in other cases from across Metro Vancouver.
- Transition towards higher density forms of redevelopment may create conflict / make the area less convenient for auto-dependent DNV residents and customers of the area.
- Permitted densities along the corridor remain comparatively low, limiting scope of redevelopment potential.
- At grade commercial opportunities face competition between retail and population-serving office uses, making it difficult to ensure engaging retail streets.

## + Official Community Plan Land Use Designation



Source: District of North Vancouver

Sub-area Boundary

OCP Class

COMMERCIAL

COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3

INDUSTRIAL

LIGHT INDUSTRIAL

INSTITUTIONAL

PARKS, OPEN SPACE, AND NATURAL AREAS

RESIDENTIAL LEVEL 2: DETACHED

RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY

RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT

First Nations Reserve

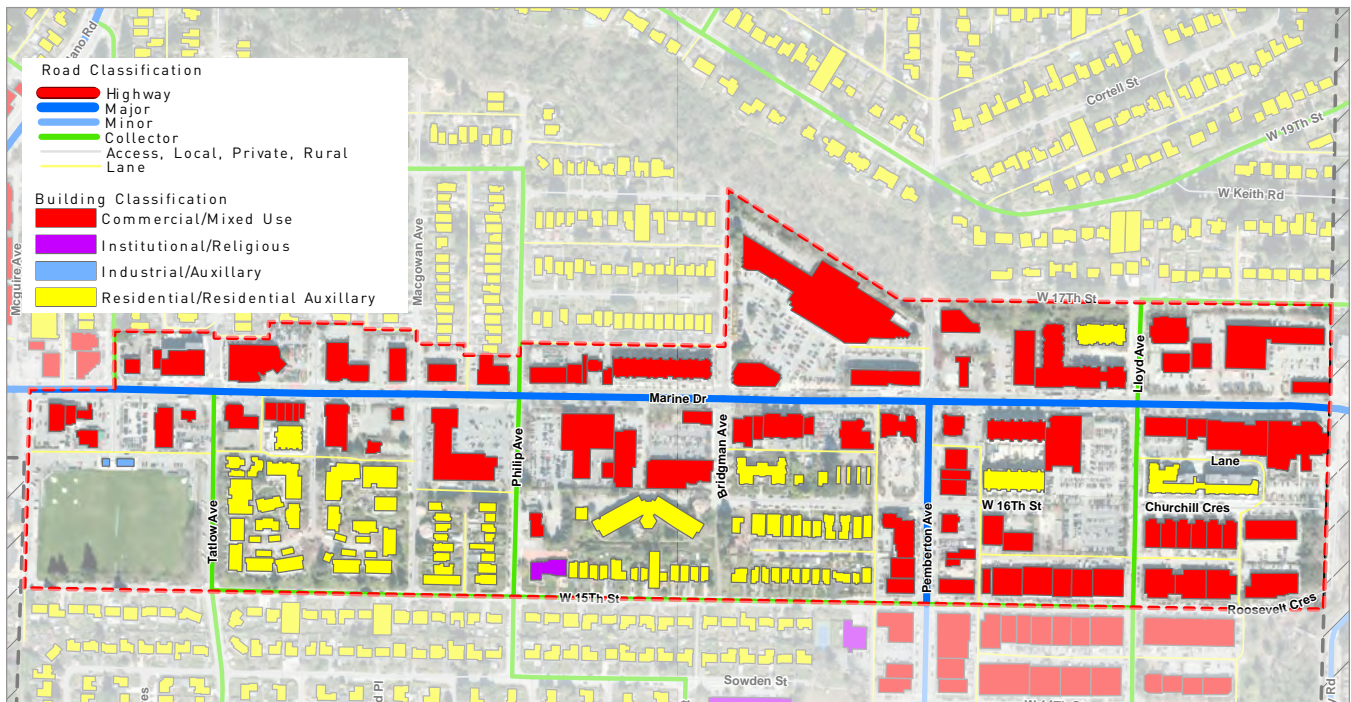
## + Developable Area by OCP Designation (2023)

Non-Employment Land	ha	Employment Land	ha
Roads	11 ha	Commercial/ Mixed Use	15 ha
Parks and Open Space	2 ha	Institutional	0.1 ha
Residential	5 ha	Industrial	2 ha
<b>Total Employment Land*</b>			<b>17 ha</b>
<b>Total Developable Area*</b>			<b>23 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver

## + Employment Space



Source: District of North Vancouver

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	915,200	87%	1,480
Mixed Use	131,700	13%	210
Institutional	-	-	-
Industrial	-	-	-
Auxiliary	1,900	-	-
<b>Total Non-Residential Floor Space*</b>	<b>1,046,800</b>	<b>100%</b>	<b>1,690</b>

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

The area is comprised of a diverse mix of older auto-oriented commercial units and industrial buildings, along with newer mixed-use buildings with retail ground floors. There may be opportunities to deliver more than one floor of commercial space in well located redevelopments, particularly in areas near transit stops.

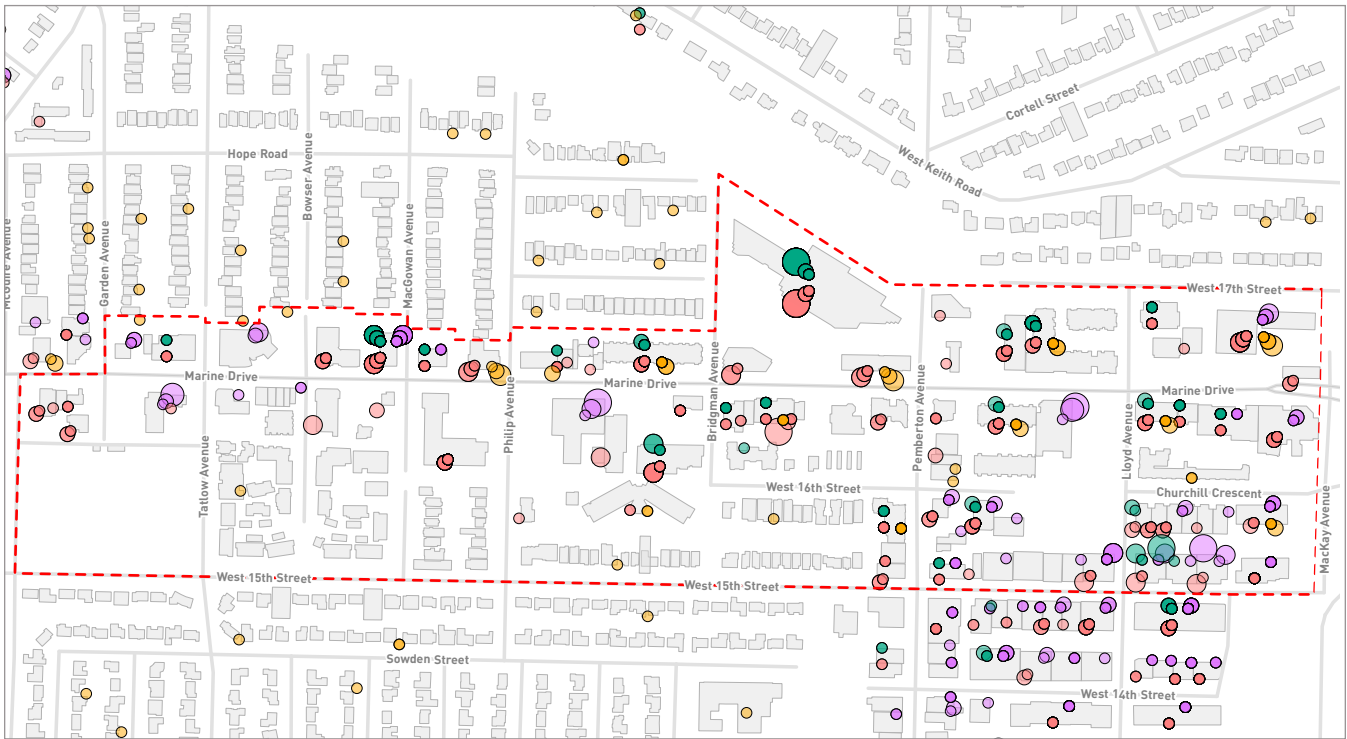
## + Projected Employment Demand-2021-2051

	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	165,000 to 247,000	650 to 810
Institutional	0 to 44,000	0 to 80
Industrial/ Auxiliary	-	-

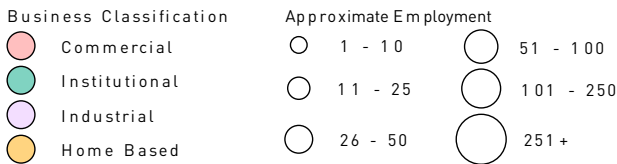
Source: B&A & Urban Systems, based on data adapted from Metro Vancouver



## + 2023 Business License Locations



Source: District of North Vancouver



## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	244
Institutional	135
Industrial	102
Home Based	74
<b>Total</b>	<b>555</b>

Source: District of North Vancouver

The area is almost fully occupied, and serves as home to over 400 licensed businesses.

## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

### Building Permit Classification

- New Build
- Major Addition
- Major Alteration

### Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

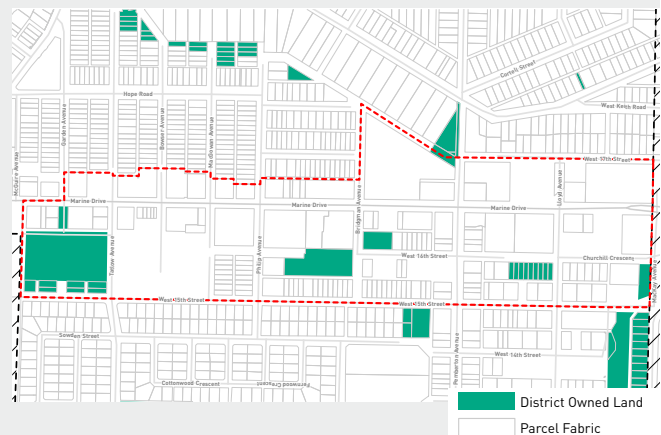
## + Non-Residential Building Permit Activity (2011-2023) + District Owned Land

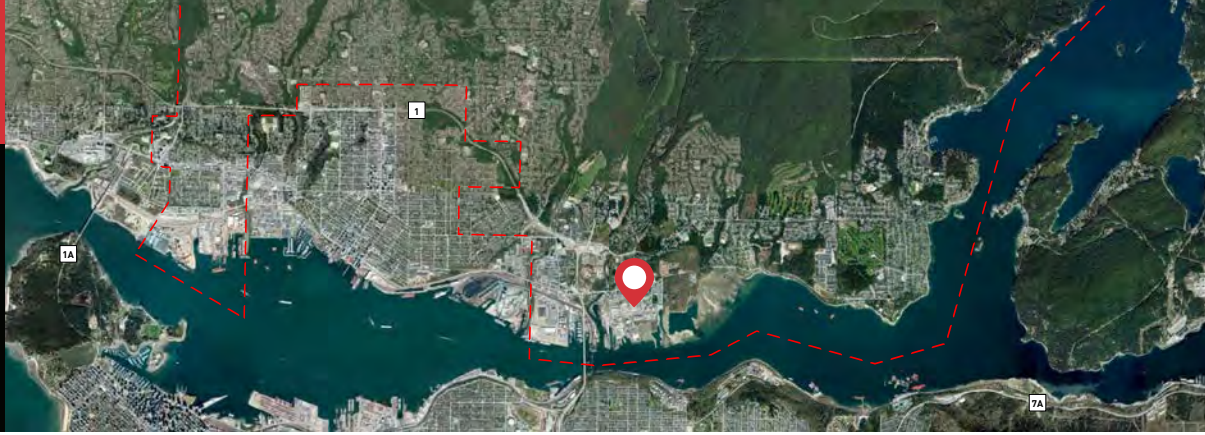
	Permits Issued	Value**
<b>New Build</b>	32	\$168,135,000
<b>Major Addition</b>	7	\$3,935,000
<b>Major Alteration</b>	79	\$36,890,000
<b>Total*</b>	118	\$208,960,000

\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

Source: District of North Vancouver





## Maplewood Industrial

The Maplewood Industrial cluster consists of the series of light industrial uses located across the Dollarton Highway, just south of the Maplewood Village Centre. The area is characterized by a mix of older light industrial buildings and newer business parks that abut the industrialized waterfront of the port. The employment focus and opportunities are expected to intensify within existing industrial land uses as local businesses and business parks expand. The study area also includes the 'Innovation Campus' lands that are located on the eastern edge of the Maplewood Village Centre. At approximately 45 acres (18.2 ha) these lands represent one of the most significant underdeveloped industrial parcels left in the District of North Vancouver. Formerly a gravel quarry, this property is under the ownership of a partnership between the Tsleil-Waututh First Nation and a private developer, who have put forward a plan for the site that envisions a flexible mix of light industrial, commercial, institutional, recreational, hospitality and residential uses.



### OPPORTUNITIES

- + The area includes some of the District's last underdeveloped lands that are designated for employment and economic uses.
- + The policies that affect the Village Centre are meant to work in harmony with the industrial area creating synergies between the residential focus of the Centre and employment focus of the industrial area.
- + Proximity to Capilano University can offer potential partnerships between innovative industrial business employment opportunities and the University.
- + Presence of large, well-located industrial parcels may present feasible location for redevelopment as multi-level intensified employment space if zoning permits.








### CHALLENGES

- Proximity to Maplewood Conservation Area may require additional screening or environmental considerations for any new development.
- Environmental considerations for the area include both coastal and river floodplains. These constraints require additional technical studies to support development and may restrict the type or extent of development proposed.
- A recent application by Tsleil-Waututh First Nation to have the Innovation District lands added to their reserve lands would take the land outside of the District's jurisdiction.

Existing land use is predominantly industrial and employment focused making it an ideal location for further industrial intensification.

 Sub-area Boundary

COMMERCIAL  
 COMMERCIAL RESIDENTIAL MIXED USE LEVEL 1,2,3  
 INDUSTRIAL  
 LIGHT INDUSTRIAL  
 INSTITUTIONAL

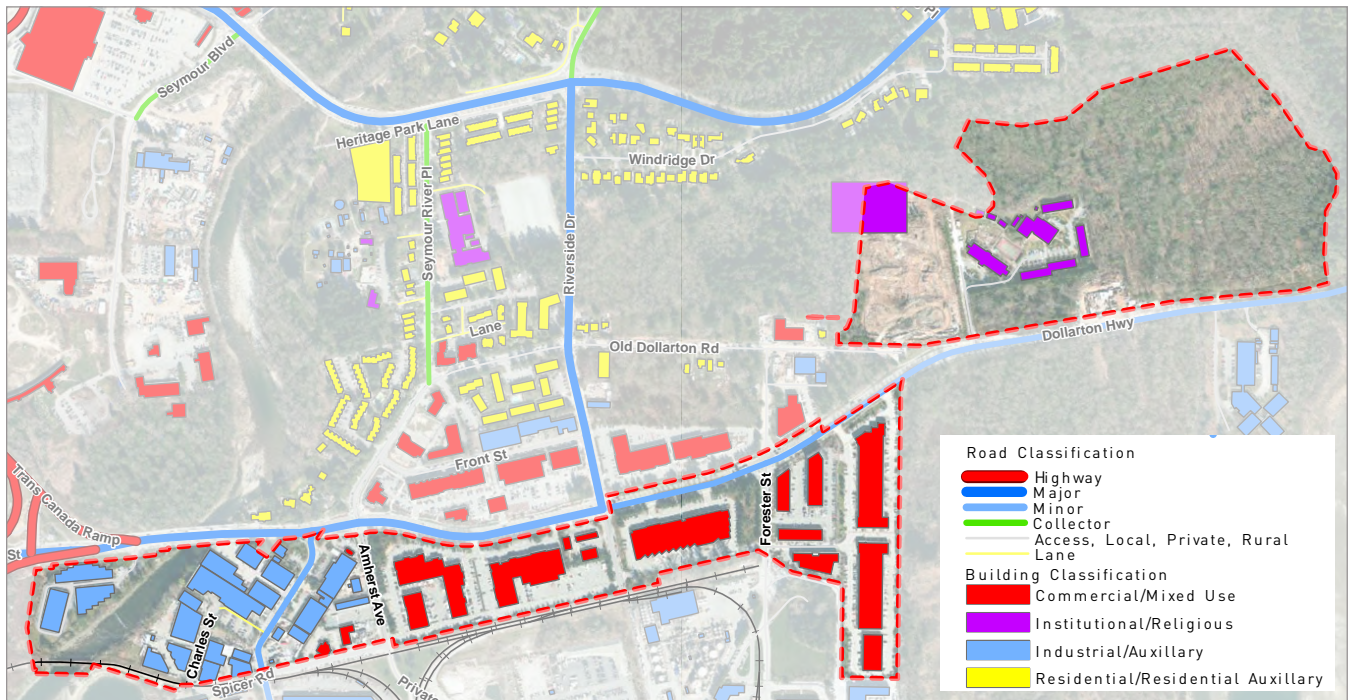
 PARKS, OPEN SPACE, AND NATURAL AREAS  
 RESIDENTIAL LEVEL 2: DETACHED  
 RESIDENTIAL LEVEL 3: ATTACHED ; LEVEL 4: TRANSITION MULTIFAMILY  
 RESIDENTIAL LEVEL 5: LOW DENSITY APARTMENT; LEVEL 6: MEDIUM DENSITY APARTMENT  
 First Nations Reserve

Non-Employment Land	ha	Employment Land	ha
Roads	3	Commercial/ Mixed Use	-
Parks and Open Space	2 ha	Institutional	-
Residential	-	Industrial	35 ha
<b>Total Employment Land*</b>			<b>35 ha</b>
<b>Total Developable Area*</b>			<b>35 ha</b>

Source: District of North Vancouver



## + Employment Space



Source: District of North Vancouver

## + Non-Residential Floor Space

	Gross Sq Ft	Percentage	Estimated Jobs
Commercial	735,900	55%	1190
Mixed Use	-	-	-
Institutional	187,000	14%	300
Industrial	409,200	31%	460
Auxiliary	-	-	-
Total Non-Residential Floor Space*	1,332,100	100%	1950

\*Figures may not sum to total due to rounding

Source: B&A & Urban Systems, based on data provided by the District of North Vancouver

While the lands are almost entirely zoned as Light Industrial, the majority of the uses are commercial focused. Commercial uses may require different policy intervention and support than industrial uses and care should be taken when determining if a mix of employment uses is desired.

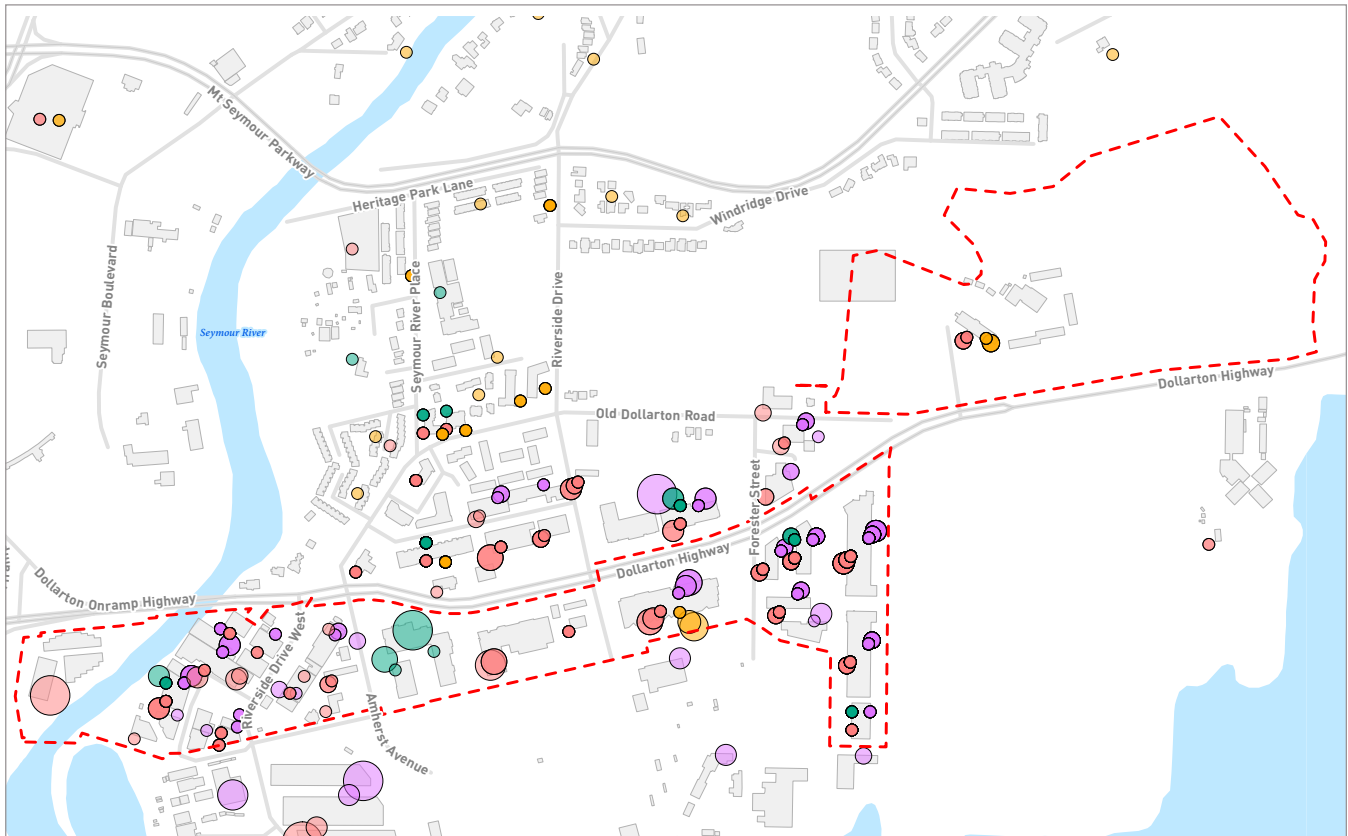
## + Projected Employment Demand-2021-2051

	Net GFA (sq ft)	Net Jobs
Commercial/Mixed Use	110,000 to 137,000	445 to 500
Institutional	33,000 to 66,000	95 to 155
Industrial/ Auxiliary	120,000 to 239,000	245 to 405

Source: B&A & Urban Systems, based on data adapted from Metro Vancouver



## + 2023 Business License Locations



Source: District of North Vancouver

Business Classification	Approximate Employment		
Commercial	1 - 10	51 - 100	
Institutional	11 - 25	101 - 250	
Industrial	26 - 50	251 +	
Home Based			

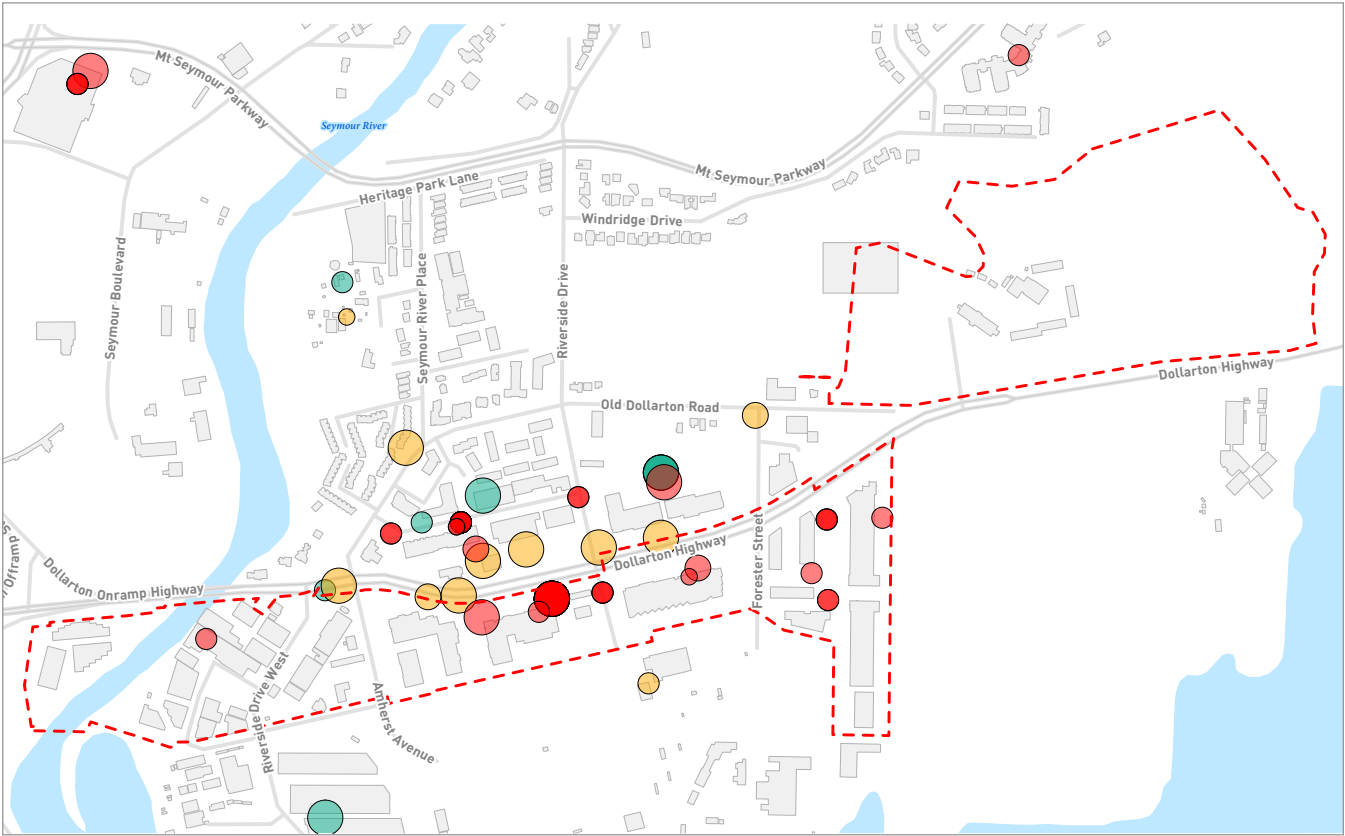
## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	121
Institutional	33
Industrial	228
Home Based	9
<b>Total</b>	<b>391</b>

Source: District of North Vancouver



# + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

## Building Permit Classification

- New Build
- Major Addition
- Major Alteration

## Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

# + Non-Residential Building Permit Activity (2011-2023)

	Permits Issued	Value**
<b>New Build</b>	3	\$58,586,000
<b>Major Addition</b>	1	\$400,000
<b>Major Alteration</b>	27	\$23,442,000
<b>Total*</b>	37	\$82,428,000

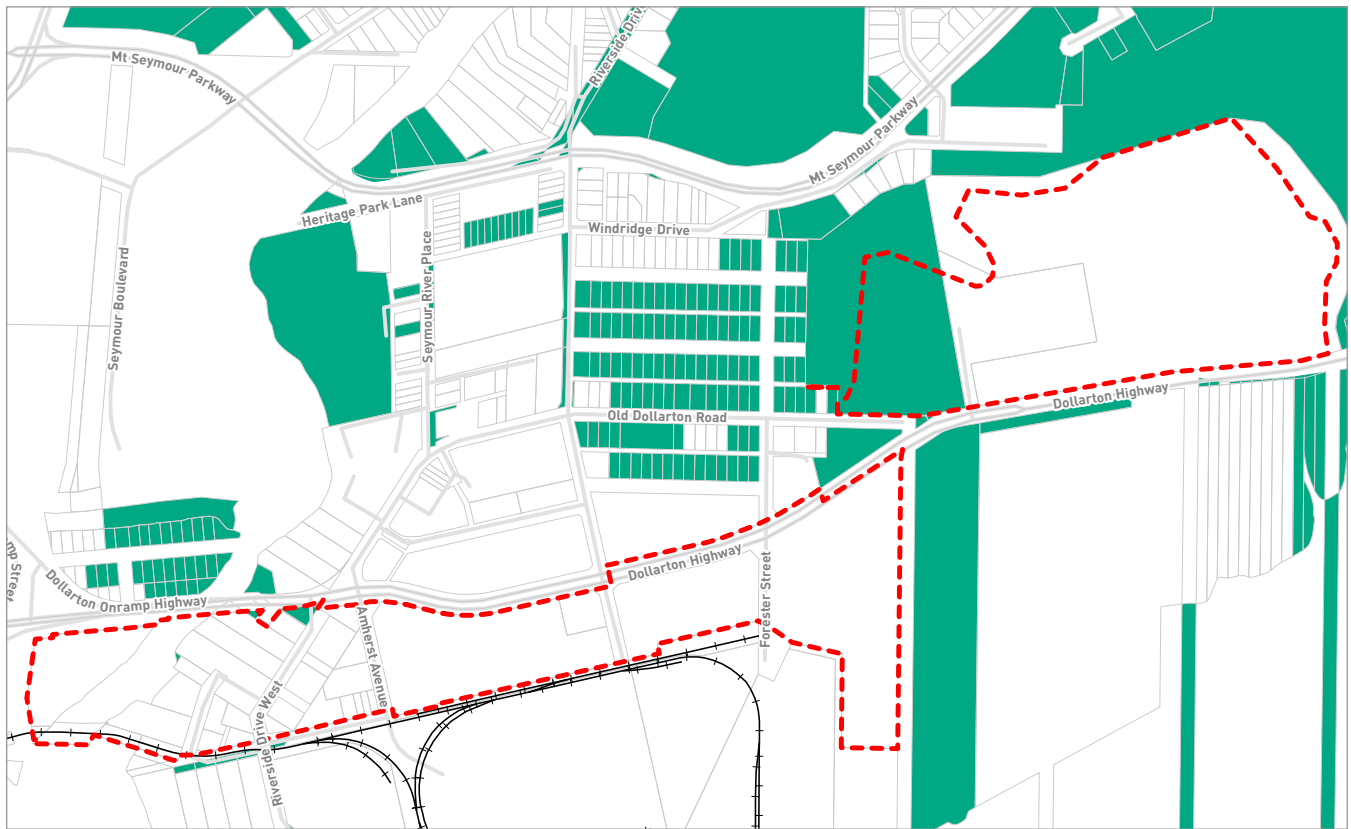
\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

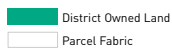
Source: District of North Vancouver



## + District Owned Land



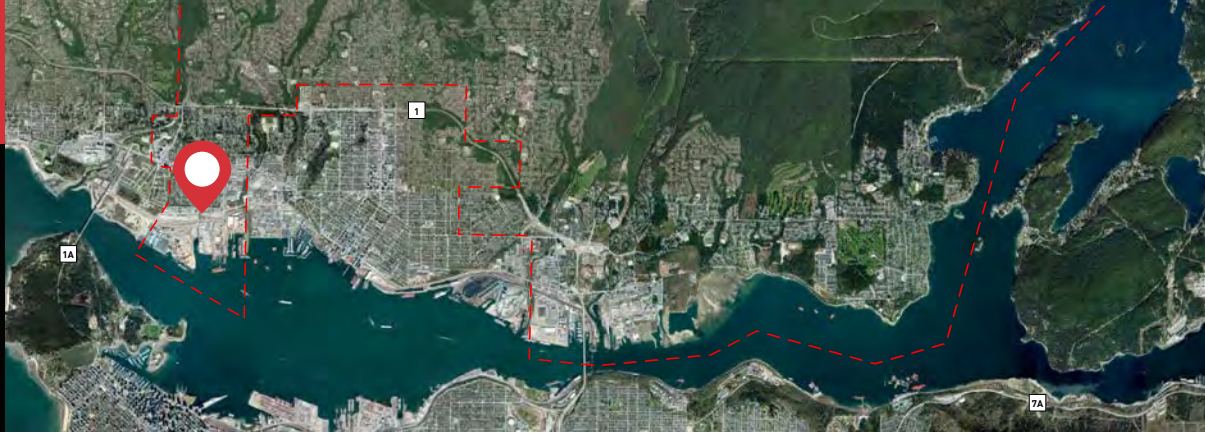
Source: District of North Vancouver



The District is redeveloping the large industrial parcel it owns in the study area to accommodate the new Maplewood Fire & Rescue Centre (shown below).







## Marine Drive Industrial

The Marine Drive Industrial cluster includes the concentration of industrial businesses located on the southwest side of the District. Comprised of larger industrial parcels located along West 1st Street and numerous smaller industrial properties found along and to the east of Pemberton Avenue, the area is home to a diverse mix of business supporting and population-oriented businesses. The area represents one of the last and largest contiguous clusters of light industrial properties within the District's jurisdiction, while also serving as a transitional buffer between the residential uses to the north and the heavier port-related industrial activities located to the south.

### +

#### OPPORTUNITIES

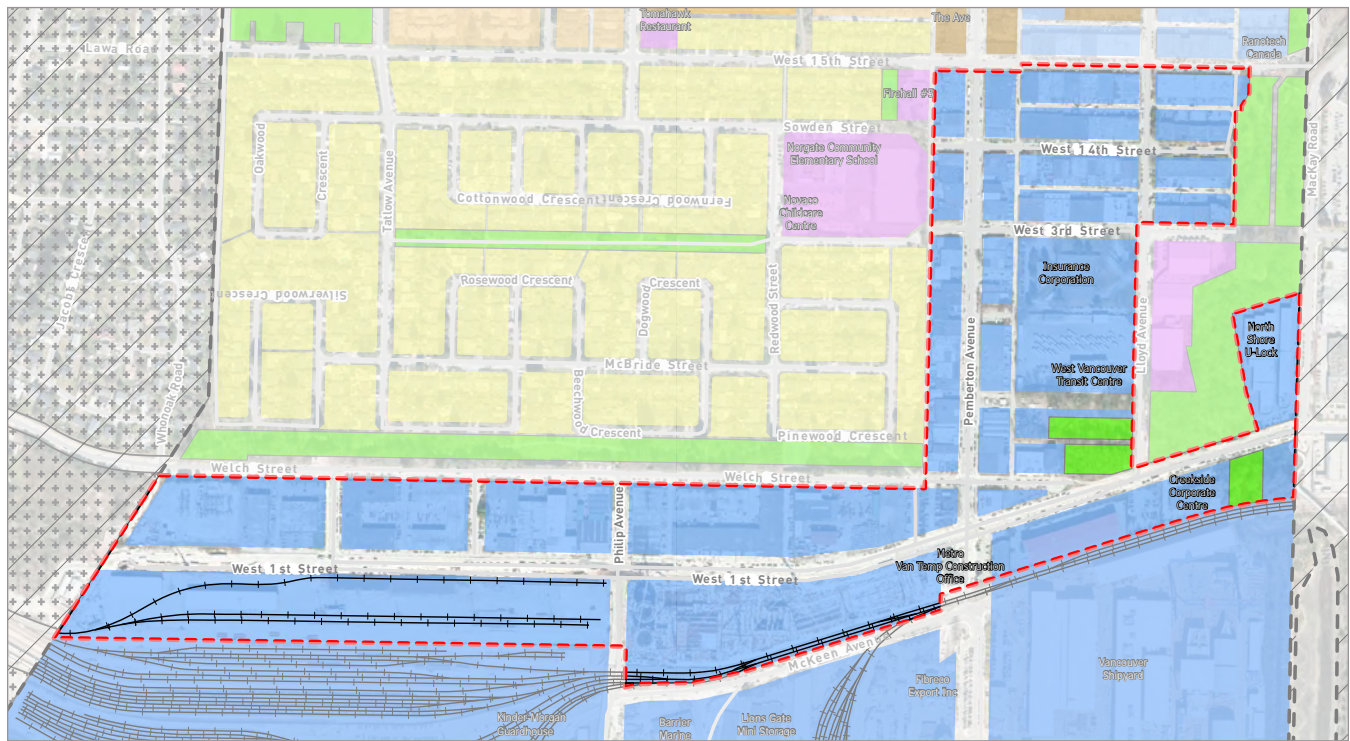
- + The area remains almost fully occupied with low vacancies and a diverse mix of light industrial businesses.
- + Proximity to port and rail facilities creates opportunities for synergies with nearby heavy industry.
- + Contiguous nature of industrial lands limits potential for encroachment and conflict with sensitive uses.
- + Area is primarily zoned as Employment Zone Light Industrial, which enables a range of industrial and business supportive densities.

### -

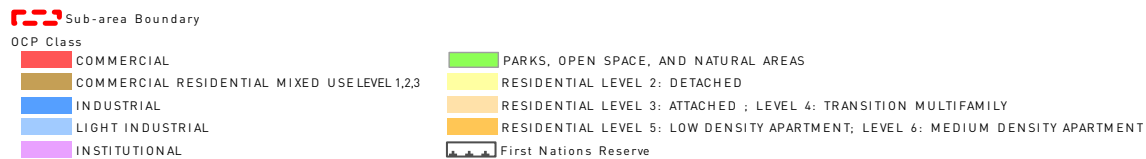
#### CHALLENGES

- The area is further removed from highway infrastructure than other key industrial clusters located in the DNV.
- Much of the employment space is comprised of older buildings that may not offer many of the design features sought by modern industrial users.
- Small parcel lot pattern may make it difficult to redevelop certain portions of the area for higher density industrial uses.
- Despite EZLI zoning already in place, redevelopment at higher densities has not yet occurred. Current policy may require a review to confirm if it is sufficient to encourage industrial intensification.

## + Official Community Plan Land Use Designation



Source: District of North Vancouver



## + Developable Area by OCP Designation (2023)

Non-Employment Land	ha	Employment Land	ha
Roads	10 ha	Commercial/ Mixed Use	-
Parks and Open Space	1 ha	Institutional	-
Residential	-	Industrial	29 ha
<b>Total Employment Land*</b>			<b>29 ha</b>
<b>Total Developable Area*</b>			<b>29 ha</b>

\*Figures may not sum to total due to rounding

Source: District of North Vancouver

**Road Classification**

- Highway
- Major
- Minor
- Collector
- Access, Local, Private, Rural Lane

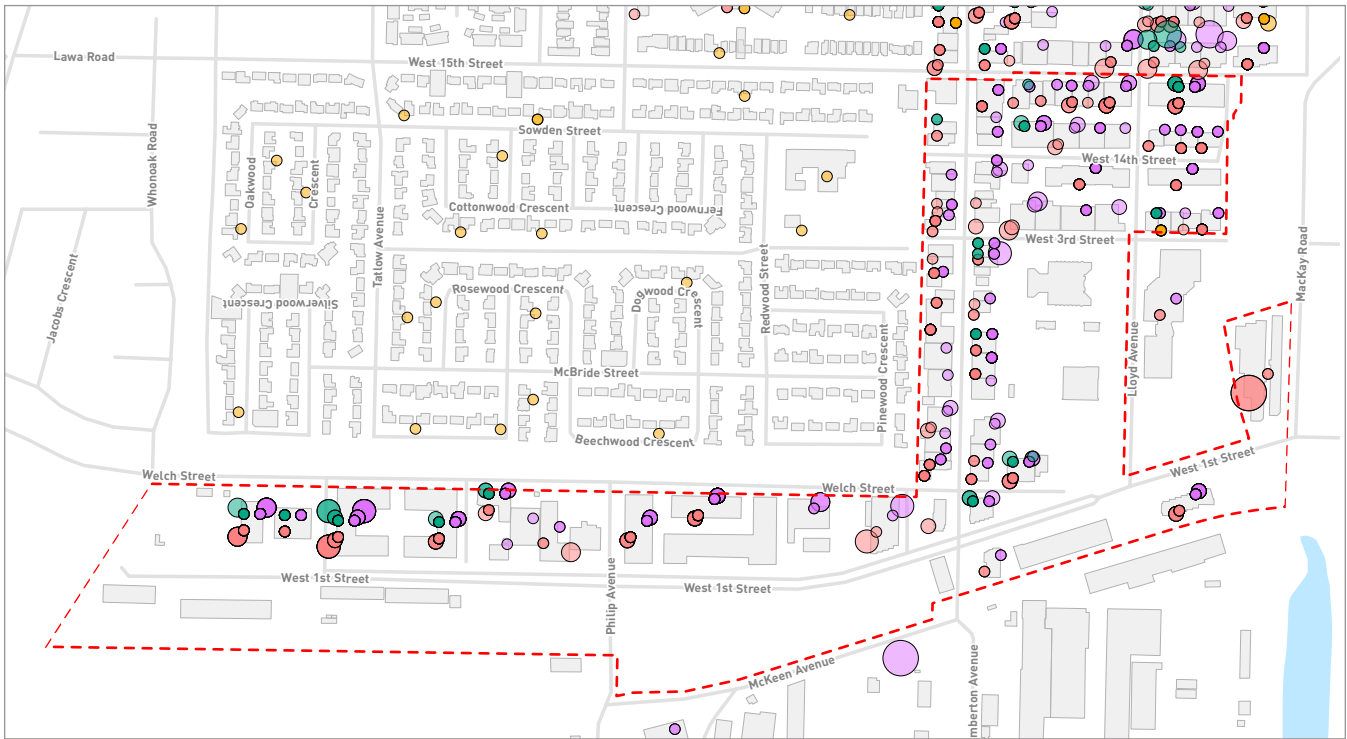
**Building Classification**

- Commercial/Mixed Use
- Institutional/Religious
- Industrial/Auxiliary
- Residential/Residential Auxiliary
- Recreation

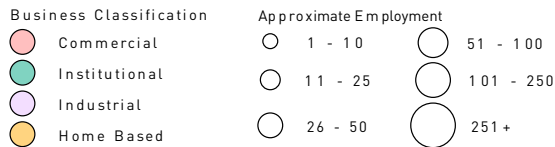
The map displays the proposed alignment for the Portland-Sherlock Expressway, indicated by a thick blue line. The alignment runs horizontally across the center of the map, passing through various urban areas. The map includes a legend for Road Classification and Building Classification. The proposed alignment is shown as a thick blue line running horizontally across the center of the map.



## + 2023 Business License Locations



Source: District of North Vancouver



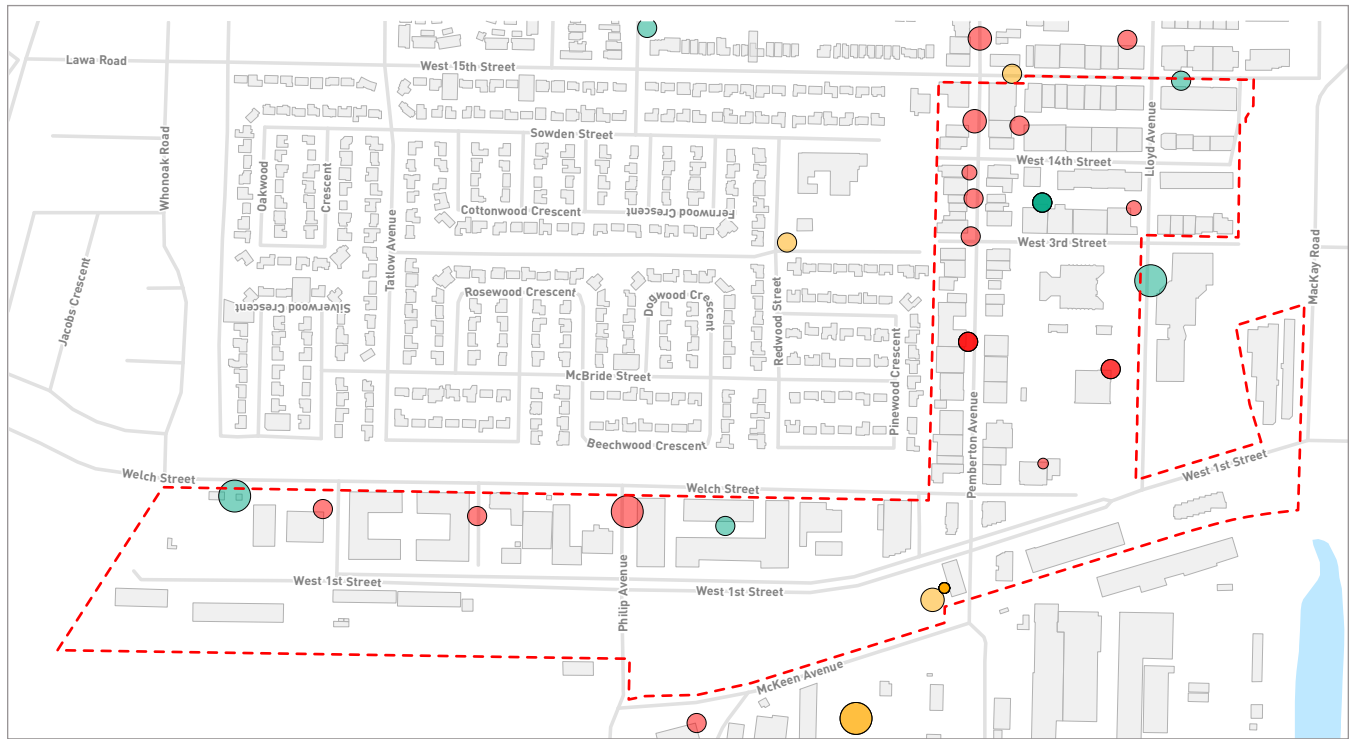
## + Business Licenses by Type (2023)

	Licenses Issued
Commercial	202
Institutional	88
Industrial	228
Home Based	3
<b>Total</b>	<b>521</b>

Source: District of North Vancouver



## + Building Permit Valuation by Permit Classification



Source: District of North Vancouver

### Building Permit Classification

- New Build
- Major Addition
- Major Alteration

### Permit Valuation (\$)

- 1000 - 10000
- 10001 - 100000
- 100001 - 500000
- 500001 - 1000000
- 1000001+

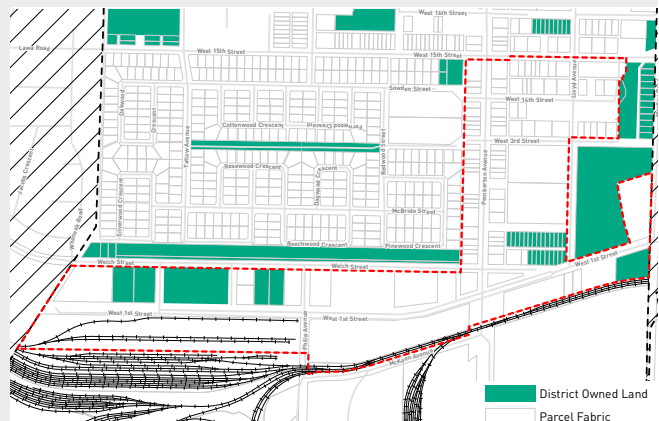
## + Non-Residential Building Permit Activity (2011-2023) + District Owned Land

	Permits Issued	Value**
<b>New Build</b>	16	\$797,000
<b>Major Addition</b>	7	\$3,242,000
<b>Major Alteration</b>	15	\$5,337,000
<b>Total*</b>	38	\$9,376,000

\*Figures may not sum to total due to rounding

\*\* Permit Valuation is based on construction value

Source: District of North Vancouver



Source: District of North Vancouver



## **APPENDIX C: PROJECTED FLOOR SPACE ALLOCATIONS**



**Table 1. Floor Space per Worker Allocations**

Floor Space Per Worker	2016	2021	2031	2041	2051
Commercial	538	618	538	527	517
Industrial	813	894	792	773	753
Institutional	573	618	573	561	550

**Table 2. Employment Demand**

Employment Demand	2016	2021	2031	2041	2051
Commercial	12,285	10,700	13,516	14,545	15,449
Industrial	8,175	7,435	9,918	10,558	11,087
Institutional	6,670	6,185	7,896	8,435	8,939
<b>Total</b>	<b>27,130</b>	<b>24,320</b>	<b>31,330</b>	<b>33,538</b>	<b>35,475</b>

**Table 3. Net Employment Change**

Net Employment Change	2016	2016-21	2021-31	2031-41	2041-51
Commercial	-	(1,585)	2,816	1,028	905
Industrial	-	(740)	2,483	640	528
Institutional	-	(485)	1,711	539	504
<b>Total</b>	<b>-</b>	<b>(2,810)</b>	<b>7,010</b>	<b>2,208</b>	<b>1,937</b>

**Table 4. Gross Floor Space Demand Allocations**

Gross Floor Space Demand	2016	2021	2031	2041	2051
Commercial	6,607,898	6,607,898	7,270,130	7,666,869	7,980,805
Industrial	6,644,651	6,644,651	7,859,887	8,158,181	8,352,133
Institutional	3,819,695	3,819,695	4,521,849	4,733,844	4,916,562
<b>Total</b>	<b>17,072,244</b>	<b>17,072,244</b>	<b>19,651,866</b>	<b>20,558,895</b>	<b>21,249,501</b>

**Table 5. Net Floor Space Demand**

Net Floor Space Demand	2016	2016-21	2021-31	2031-41	2041-51
Commercial	-	-	662,232	396,739	313,936
Industrial	-	-	1,215,236	298,294	193,952
Institutional	-	-	702,154	211,995	182,718
<b>Total</b>	<b>-</b>	<b>-</b>	<b>2,579,622</b>	<b>907,029</b>	<b>690,606</b>



**Table 6. Incremental Growth Shares in District of North Vancouver Sub-Areas, 2021-2051**

Incremental Growth Shares	Commercial			Industrial			Institutional		
DNV Sub-Area	Current	Low	High	Current	Low	High	Current	Low	High
Citywide	100%	100%	100%	100%	100%	100%	100%	100%	100%
Town Centres and Villages	48%	44%	65%	14%	11%	20%	7%	12%	34%
Deep Cove Village Centre	1%	1%	2%	0%	0%	0%	0%	0%	1%
Edgemont Village Centre	4%	3%	5%	0%	0%	0%	1%	2%	3%
Lions Gate Village	5%	6%	9%	0%	0%	0%	0%	2%	6%
Lynn Creek Town Centre	10%	10%	15%	12%	10%	14%	5%	4%	8%
Lynn Valley Town Centre	7%	6%	8%	0%	0%	0%	0%	2%	6%
Maplewood Village Centre	4%	6%	8%	1%	1%	6%	1%	2%	6%
Marine Drive Village Centre	16%	12%	18%	0%	0%	0%	0%	0%	4%
Industrial Areas	30%	16%	20%	17%	19%	30%	5%	3%	6%
Maplewood Industrial	11%	8%	10%	6%	7%	14%	5%	3%	6%
Marine Drive Industrial	18%	8%	10%	11%	12%	16%	0%	0%	0%
Rest of DNV	23%	40%	15%	69%	70%	50%	88%	85%	60%

**Table 7. Net Floor Area Growth in District of North Vancouver Sub-Areas, 2021-2051**

GFA Growth - 2021-51				Commercial			Industrial			Institutional		
DNV Sub-Area	Current	Low	High	Current	Low	High	Current	Low	High	Current	Low	High
Citywide	6,608,000	1,373,000	1,373,000	6,645,000	1,707,000	1,707,000	3,820,000	1,097,000	1,097,000			
Town Centres and Villages	3,145,000	604,000	892,000	915,000	188,000	341,000	263,000	132,000	373,000			
Deep Cove Village Centre	58,000	14,000	27,000	-	-	-	-	-	11,000			
Edgemont Village Centre	248,000	41,000	69,000	-	-	-	25,000	22,000	33,000			
Lions Gate Village	360,000	82,000	124,000	-	-	-	-	22,000	66,000			
Lynn Creek Town Centre	677,000	137,000	206,000	824,000	171,000	239,000	184,000	44,000	88,000			
Lynn Valley Town Centre	481,000	82,000	110,000	-	-	-	15,000	22,000	66,000			
Maplewood Village Centre	275,000	82,000	110,000	89,000	17,000	102,000	40,000	22,000	66,000			
Marine Drive Village Centre	1,047,000	165,000	247,000	2,000	-	-	-	-	44,000			
Industrial Areas	1,955,000	220,000	275,000	1,124,000	324,000	512,000	187,000	33,000	66,000			
Maplewood Industrial	736,000	110,000	137,000	409,000	120,000	239,000	187,000	33,000	66,000			
Marine Drive Industrial	1,219,000	110,000	137,000	715,000	205,000	273,000	-	-	-			
Rest of DNV	1,507,000	549,000	206,000	4,606,000	1,195,000	854,000	3,369,000	932,000	658,000			

**Table 8. Net Employment Growth in District of North Vancouver Sub-Areas, 2021-2051**

Employment Growth - 2021-51			Commercial			Industrial			Institutional		
DNV Sub-Area	Current	Low	High	Current	Low	High	Current	Low	High		
Citywide	10,700	4,750	4,750	7,435	3,650	3,650	6,185	2,755	2,755		
Town Centres and Villages	5,095	2,165	2,725	1,025	440	645	425	290	730		
Deep Cove Village Centre	95	45	70	-	-	-	-	-	20		
Edgemont Village Centre	400	160	210	-	-	-	40	45	65		
Lions Gate Village	585	275	355	-	-	-	-	40	120		
Lynn Creek Town Centre	1,095	480	615	920	400	490	295	115	195		
Lynn Valley Town Centre	780	310	365	-	-	-	25	45	125		
Maplewood Village Centre	445	245	300	100	40	155	65	50	130		
Marine Drive Village Centre	1,695	650	810	-	-	-	-	-	80		
Industrial Areas	3,165	1,045	1,150	1,260	665	915	305	95	155		
Maplewood Industrial	1,190	445	500	460	245	405	305	95	155		
Marine Drive Industrial	1,975	600	650	800	420	510	-	-	-		
Rest of DNV	2,440	1,540	875	5,155	2,545	2,095	5,455	2,365	1,865		



## **APPENDIX D: RETAIL DEMAND FORECAST**

## COMMERCIAL RETAIL DEMAND FORECAST

In addition to the Metro Vancouver growth projections, a detailed retail forecast has also been prepared to provide an analysis of retail-commercial demand for the District covering a study period to 2041.

### Approach

Although it is beyond the scope of this study to undertake detailed custom trade area-driven retail demand analysis for each of the priority town centres and industrial sub-areas, there is sufficient information to evaluate growth potential at a higher level. The methodology used in support of this report, and summarized below, focused on the following steps:

- Quantifying District of North Vancouver retail spending growth over the 2021 to 2041 period;
- Estimating District-Wide market capture of incremental spending;
- Estimating inflow spending from non-DNV residents;
- Converting incremental sales volume capture into market-supportable floor area; and,
- Allocating incremental floor area to priority town centres and industrial sub-areas.

Detailed analysis pertaining to each step mentioned is summarized in the following sections.

### Projected Growth in Spending by Category

A retail demand model has been used to assess growth potential based on historical trends in per capita retail spending at the District of North Vancouver level, as tracked by Statistics Canada's retail trade volumes by category. For restaurant food and beverage spending, which is an important category to consider in the healthy evolution of priority town centres, data from Statistics Canada's national household survey was used, with spending estimates on restaurant food and beverages serving as a proxy for retail spending in the restaurant sector. For illustrative purposes, annual per capita spending at the District level for select categories is estimated as follows:

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<sup>1</sup> Retail demand forecasts typically fall in the 15-20 year time horizon. For the purposes of this review for the District, incremental retail demand has been modeled over a 20-year horizon.

**Table 1. Annual per Capita Spending, District of North Vancouver**

Retail Category	Spending
Furniture and home furnishings stores	\$542
Electronics and appliances	\$371
Building materials, garden equipment and supplies	\$1,394
Supermarkets and other grocery stores	\$2,636
Liquor stores	\$1,202
Clothing stores	\$978
Sporting goods, hobby book and music stores	\$366
General merchandise stores	\$2,247
Health and personal care stores	\$1,524
Restaurant food and beverage	\$1,987

Source: Statistics Canada retail spending data, Urban Systems trend-based forecast

With application of projected population growth for the District in addition to the consideration of a modest growth in per capita spending over time, total gross retail spending by category can be expected to grow as follows in Table 2 over the 2021 to 2041 period.

**Table 2. Total Annual Expenditure Potential by Category, District of North Vancouver, 2021-2041**

Retail Category	Annual DNV Spending Potential - 2021	Annual DNV Spending Potential - 2041	2021-2041 Change in Annual DNV Spending
Furniture and home furnishings	\$49.4M	\$64.4M	\$14.9M
Electronics and appliances	\$33.8M	\$41.5M	\$7.7M
Building materials, garden equipment	\$127.0M	\$194.0M	\$67.0M
<b>Supermarkets and other grocery</b>	<b>\$240.2M</b>	<b>\$310.3M</b>	<b>\$70.1M</b>
Convenience stores	\$13.5M	\$18.7M	\$5.1M
<b>Specialty food stores</b>	<b>\$19.4M</b>	<b>\$25.9M</b>	<b>\$6.5M</b>
Liquor stores	\$109.6M	\$165.9M	\$56.3M
Clothing stores	\$89.1M	\$132.1M	\$43.0M
Shoe stores	\$8.8M	\$11.4M	\$2.5M
Jewellery, luggage, leather goods stores	\$14.5M	\$22.2M	\$7.7M
Sporting goods, books, music stores	\$33.3M	\$40.4M	\$7.1M
General merchandise stores	\$204.8M	\$299.1M	\$94.2M
<b>Miscellaneous store retailers</b>	<b>\$62.9M</b>	<b>\$96.7M</b>	<b>\$33.8M</b>
<b>Health and personal care stores</b>	<b>\$138.9M</b>	<b>\$212.9M</b>	<b>\$74.0M</b>
<b>Restaurant food and beverage</b>	<b>\$181.1M</b>	<b>\$271.4M</b>	<b>\$90.3M</b>

Source: Statistics Canada retail trade data, Urban Systems retail demand modeling

Over the 2021 to 2041 period, total annual DNV resident retail spending (all retail trade categories) is expected to grow from \$1.77 billion to \$2.56 billion – an increase of roughly \$789 million or 48%. Table 2 provides a summary of anticipated growth in total annual resident spending potential over the same period on a category-by-category basis. As noted earlier, restaurant food and beverage spending, which is not captured by Statistics Canada’s retail trade categories, is estimated based on spending information provided in Statistics Canada’s household survey.

While all categories identified are relevant to a discussion of growth potential within the District of North Vancouver, those highlighted in bold are particularly relevant as they are particularly aligned with local area population and employment growth and are therefore natural building blocks in the continued evolution of high priority mixed-use town centres. These include:

- **Supermarkets and other grocery:** \$70.1M or 30% increase in annual spending potential
- **Specialty food stores:** \$6.5M or 35% increase in annual spending potential
- **Miscellaneous store retailers:** \$33.8M or 59% increase in annual spending potential (this category includes florists and pet stores)
- **Health and personal care stores:** \$74.0M or 58% increase in annual spending potential
- **Restaurant food and beverage:** \$90.3M or 54% increase in annual spending potential

### District of North Vancouver Market Capture

As this analysis is driven mainly by incremental growth in total annual DNV resident spending, a key step in evaluating DNV-wide growth potential is to estimate achievable market capture rates for incremental spending growth by category. These are the anticipated proportions of incremental spending growth that can be expected to be captured within the District of North Vancouver, including identified high priority town centres, industrial sub-areas, and other areas of the District. Realistic and achievable District-wide market capture rates are summarized below in Table 3.

**Table 3. Market Capture by Retail Category, District of North Vancouver, 2021-2041**

Retail Category	District of North Vancouver market-wide capture rate
Furniture and home furnishings	50%
Electronics and appliances	60%
Building materials, garden equipment	80%
<b>Supermarkets and other grocery</b>	<b>80%</b>
Convenience stores	80%
<b>Specialty food stores</b>	<b>80%</b>
Liquor stores	60%
Clothing stores	50%
Shoe stores	50%
Jewellery, luggage, leather goods stores	50%
Sporting goods, books, music stores	75%
General merchandise stores	75%
<b>Miscellaneous store retailers</b>	<b>80%</b>
<b>Health and personal care stores</b>	<b>80%</b>
<b>Restaurant food and beverage</b>	<b>60%</b>

Source: Urban Systems estimates

These estimates are supported by an understanding of retail development and shopping patterns which has developed through retail market analysis work across Metro Vancouver over the past decade. Generally speaking, destination-oriented retail categories (e.g., home furnishings, clothing, shoes, jewellery) tend to cluster in high profile shopping centres, many of which are located outside the municipal boundary. As such, market capture rates are significantly lower in these shopping centre categories:

- **Furniture and home furnishings** – 50% (many shopping options across the north shore and in Metro Vancouver)
- **Clothing and shoe stores** – 50% (as above, with particular focus on Park Royal Shopping Centre, Pacific Centre and Robson Street in Vancouver, etc.)
- **Jewellery, Luggage, Leather goods stores** – 50% (as above, with similar concentrations – high end options within the Alberni St. district in Vancouver)

Conversely, market capture rates tend to be highest in categories with high current representation within the District boundary. This includes a wide range of core population-serving retailers in categories such as supermarkets, specialty foods, general merchandise and health and personal care stores, which have healthy representation within the DNV.



## Inflow Spending by Category

As in every significant retail market, not all net retail-commercial spending within the District of North Vancouver is generated by local DNV residents. A significant portion of annual captured sales at DNV-based businesses will continue to be supported by a wide array of non-DNV residents, including:

- Other north shore residents
- Day visitors from other Metro Vancouver area municipalities
- Daytime employees with a place of residence outside the DNV
- Tourists and visitors

While custom inflow and outflow analysis supported by examination of cellular mobility datasets over time is beyond the scope of this project, recent project experience suggests the following as being reasonable estimates of inflow spending on a category-by-category basis:

**Table 4. Estimated Inflow (Non-Resident) Spending by Category, District of North Vancouver**

Retail Category	Estimated DNV Inflow spending proportions	Estimated Proportion of spending by DNV residents
Furniture and home furnishings	20%	80%
Electronics and appliances	10%	90%
Building materials, garden equipment	15%	85%
<b>Supermarkets and other grocery</b>	<b>20%</b>	<b>80%</b>
Convenience stores	30%	70%
<b>Specialty food stores</b>	<b>20%</b>	<b>80%</b>
Liquor stores	15%	85%
Clothing stores	20%	80%
Shoe stores	20%	80%
Jewellery, luggage, leather goods stores	20%	80%
Sporting goods, books, music stores	30%	70%
General merchandise stores	20%	80%
<b>Miscellaneous store retailers</b>	<b>25%</b>	<b>75%</b>
<b>Health and personal care stores</b>	<b>15%</b>	<b>85%</b>
<b>Restaurant food and beverage</b>	<b>50%</b>	<b>50%</b>

Source: Urban System estimates

These inflow spending estimates represent proportions of expected non-DNV-resident sales by category, where total DNV sales for each category are calculated as follows:

$$\frac{(\$ \text{ Total Annual Spending Potential}) * (\text{Market Capture Rate})}{(\text{Proportion of DNV spending by DNV residents})} = \text{Total DNV Spending}$$

Those categories with the highest degree of inflow spending from non-trade area residents tend to be those featuring destination clusters, businesses or offerings that are not easily replicated in other regional residents' home markets. Thus, estimated inflow proportions are particularly high in the restaurant food and beverage category, as businesses in this sector benefit tremendously throughout the year by visitation and spending from residents and visitors from beyond the DNV boundaries.

### Market-Supportable Incremental Floor Space to 2041

The retail demand model leverages quantified annual spending potential, market capture rates and the above-outlined inflow spending estimates accounting for non-DNV-resident spending to project anticipated total sales volume over the 2021 to 2041 period. As shown in Table 5 and reflecting the redevelopment / infill nature of retail-commercial growth opportunities in the DNV, the model then isolates incremental total annual retail spending growth over this period. This approach therefore assumes that existing businesses will continue to be supported by healthy spending levels and that additional facilities will generally be brought to market to meet new demand (i.e. beyond current levels). Retail sales volume projections and incremental 2021-41 spending growth by category for the District are presented in the following Table 5.

**Table 5. Incremental Growth in Retail Spending, District of North Vancouver, 2021-2041**

Retail Category	Annual DNV Spending - 2021	Annual DNV Spending - 2041	2021-2041 Change in Annual DNV Spending
Furniture and home furnishings	\$30.9M	\$40.2M	\$9.3M
Electronics and appliances	\$22.5M	\$27.7M	\$5.1M
<b>Building materials, garden equipment</b>	<b>\$119.5M</b>	<b>\$182.6M</b>	<b>\$63.0M</b>
<b>Supermarkets and other grocery</b>	<b>\$240.2M</b>	<b>\$310.3M</b>	<b>\$70.1M</b>
Convenience stores	\$15.5M	\$21.3M	\$5.8M
Specialty food stores	\$19.4M	\$25.9M	\$6.5M
Liquor stores	\$77.4M	\$117.1M	\$39.7M
Clothing stores	\$55.7M	\$82.6M	\$26.9M
Shoe stores	\$5.5M	\$7.1M	\$1.6M
Jewellery, luggage, leather goods stores	\$9.1M	\$13.9M	\$4.8M
Sporting goods, books, music stores	\$35.7M	\$43.3M	\$7.6M
<b>General merchandise stores</b>	<b>\$192.0M</b>	<b>\$280.4M</b>	<b>\$88.4M</b>
Miscellaneous store retailers	\$67.1M	\$103.2M	\$36.0M
<b>Health and personal care stores</b>	<b>\$130.8M</b>	<b>\$200.4M</b>	<b>\$69.6M</b>
<b>Restaurant food and beverage</b>	<b>\$217.3M</b>	<b>\$325.7M</b>	<b>\$108.3M</b>

Source: Urban Systems retail demand projections for DNV, leveraging Statistical Canada historical data

Retail-commercial categories exhibiting growth in total annual projected DNV spending of \$50M or more over the 2021-2041 study period have been bolded in Table 5, as these are the categories likely to have the greatest impact in terms of infill redevelopment opportunities within identified DNV town centres and industrial-commercial sub-areas:

- **Building materials, garden equipment & supplies** – increase of \$63.0M or 53%
- **Supermarkets and grocery stores** – increase of \$70.1M or 29%
- **General merchandise stores** – increase of \$88.4M or 46%
- **Health and personal care stores** – growth of \$69.6M or 53%
- **Restaurant food and beverage** – growth of \$108.4M or 45%

An important step in assessing the market-supportable demand for incremental retail-commercial floor space is to convert incremental spending growth into floor area estimates by applying market-appropriate sales per sq. ft. productivity rates. These are ratios of sales per sq. ft. per annum that are used as reference thresholds for healthy business performance over time.

Table 6 below summarizes both category-specific annual sales per sq. ft. productivity rates, as well as forecast incremental floor area need by category to 2041.

**Table 6. Incremental Growth in Floor Area, District of North Vancouver, 2021-2041**

Retail Category	Target Sales \$/Sq. Ft. Rates (2023 rates shown)	Market-Supportable Incremental Floor Area
Furniture and home furnishings	\$425	9,300 sq. ft.
Electronics and appliances	\$1,650	5,100 sq. ft.
Building materials, garden equipment	\$379	63,000 sq. ft.
Supermarkets and other grocery	\$758	70,100 sq. ft.
Convenience stores	\$758	5,800 sq. ft.
Specialty food stores	\$1,108	6,500 sq. ft.
Liquor stores	\$801	39,700 sq. ft.
Clothing stores	\$491	26,900 sq. ft.
Shoe stores	\$520	1,600 sq. ft.
Jewellery, luggage, leather goods stores	\$784	4,800 sq. ft.
Sporting goods, books, music stores	\$562	7,600 sq. ft.
General merchandise stores	\$339	88,400 sq. ft.
Miscellaneous store retailers	\$396	36,000 sq. ft.
Health and personal care stores	\$763	26,300 sq. ft.
Restaurant food and beverage	\$905	108,400 sq. ft.

*Source: Urban Systems reviews of industry performance over time, District of North Vancouver estimates*

Healthy sales productivity rates can vary significantly across different levels of geography and retail-commercial property types, as well as building age and quality, but the above rates are deemed appropriate for planning purposes when considering opportunities for new businesses, many of which will play a significant role in the evolution of DNV town centres.

There are nevertheless many factors which may make it challenging to accommodate this potential floorspace demand, including lack of suitable sites in suitable locations, or potential misalignment between the desired mixed-use building character of town centres and the needs of individual retail businesses – particularly larger-scale uses in categories such as home improvement and general merchandise.

The market is also often challenged with respect to the viability and timing of delivery of new retail-commercial floor area, when a significant proportion of growth will have to occur as infill redevelopment over time.

## Allocation of Incremental Floor Area to Town Centres and Industrial Sub-Areas

Given the District of North Vancouver's efforts and commitment to directing retail-commercial employment uses, wherever possible, to priority town centres and industrial sub-areas, the DNV-wide market-supportable floor area by category figures outlined in Table 6 previously can then be allocated to key town centres and sub-areas on the basis of a good understanding of both:

- An estimate of existing share of DNV commercial floor space allocation; and
- A base understanding of areas' capacity to accommodate incremental growth, primarily through redevelopment opportunities.

Table 7 below highlights both the current estimated share of DNV commercial space, as well as each area's likely potential to accommodate incremental growth needs as a range from low to high.

**Table 7. Net Employment Change and Floor Space Demand, District of North Vancouver, 2021-2051**

DNV Town Centre / Sub-Area	Current Share of DNV Commercial Space	% Share of Incremental Growth	Median Estimate of % Share Likely to be Realized
Deep Cove Village Centre	0.90%	1-2%	1.5%
Edgemont Village Centre	3.70%	3-5%	4.0%
Lions Gate Village	5.40%	6-9%	7.5%
Lynn Creek Town Centre	10.00%	10-15%	12.5%
Lynn Valley Town Centre	7.30%	6-8%	7.0%
Maplewood Village Centre	4.20%	6-8%	7.0%
Marine Drive Village Centre	15.80%	12-18%	15.0%
Maplewood Industrial	11.10%	8-10%	9.0%
Marine Drive Industrial	18.50%	8-10%	9.0%
<b>Sub-Total – Town Centres / Sub-Areas</b>	<b>76.9%</b>	<b>60%-85%</b>	<b>72.5%</b>
DNV – Other areas of the District	23.1%	15-40%	27.5%

Source: Urban Systems retail demand modeling, apportionment ranges by Urban Systems with B&A Studios

Estimates of town centre and sub-areas' ability to accommodate infill growth potential are based on a current understanding of potential redevelopment capacity over time and are subject to change based on future market and development trends. Table 8 on the following page summarizes an allocation of incremental floor space demand to 2041 across the District's key town centres and sub-areas, based on the median allocation proportions highlighted above in Table 7. The anticipated median apportionment of incremental growth across the District amounts to approximately 728,000 sq. ft.

**Table 8. Anticipated Apportionment of Incremental Floor Area Growth by Town Centre and Sub-Area**

Median Apportionment of Incremental Growth by Category (to 2041)										
Retail-Commercial Category	Incremental Need to 2041 (DNV)	Deep Cove VC	Edgemont VC	Lions Gate VC	Lynn Creek TC	Lynn Valley TC	Maplewood VC	Marine Drive	Maplewood Industrial	Marine Drive Industrial
Furniture and home furnishings stores	9,300	140	372	698	1,163	651	651	1,395	837	837
Electronics and appliances	4,900	74	196	368	613	343	343	735	441	441
Building materials, garden equipment, supplies	63,000	945	2,520	4,725	7,875	4,410	4,410	9,450	5,670	5,670
Supermarkets and Other Grocery	62,300	935	2,492	4,673	7,788	4,361	4,361	9,345	5,607	5,607
Convenience Stores	6,600	99	264	495	825	462	462	990	594	594
Specialty Food Stores	7,300	110	292	548	913	511	511	1,095	657	657
Liquor stores	37,500	563	1,500	2,813	4,688	2,625	2,625	5,625	3,375	3,375
Clothing Stores	26,900	404	1,076	2,018	3,363	1,883	1,883	4,035	2,421	2,421
Shoe Stores	1,600	24	64	120	200	112	112	240	144	144
Jewellery, Luggage, Leather Goods Stores	4,100	62	164	308	513	287	287	615	369	369
Sporting goods, hobby, book, and music stores	6,600	99	264	495	825	462	462	990	594	594
General merchandise stores	88,400	1,326	3,536	6,630	11,050	6,188	6,188	13,260	7,956	7,956
Miscellaneous store retailers	38,300	575	1,532	2,873	4,788	2,681	2,681	5,745	3,447	3,447
Auto parts, accessories, tires	239,900	3,599	9,596	17,993	29,988	16,793	16,793	35,985	21,591	21,591
Health and personal care	26,300	395	1,052	1,973	3,288	1,841	1,841	3,945	2,367	2,367
Food & Beverage	105,400	1,581	4,216	7,905	13,175	7,378	7,378	15,810	9,486	9,486
<b>Total – All Categories</b>	<b>728,000</b>	<b>11,000</b>	<b>29,000</b>	<b>55,000</b>	<b>91,000</b>	<b>51,000</b>	<b>51,000</b>	<b>109,000</b>	<b>66,000</b>	<b>66,000</b>

Source: Urban Systems      Note: Figures have been rounded and may not sum to total.