Creating a Resilient Bowen Island

A Community Economic Development Plan for Our Sustainable Future

Phase 1 Findings Report



Queen of Capilano coming into Snug Cove Marina: Courtesy of Colliers Unique Properties

March 2020



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I: Executive Summary

Background

The Bowen Island Community Economic Development (CED) Plan was funded by the fifth intake of the BC Government's Rural Dividend Program.

Community Economic Development (CED) focuses on creating strong, healthy, resilient communities which is crucial to Bowen Island's realization of being a sustainable Island Municipality within the Islands Trust and the delivery of Policy 409 in the Bowen Island Municipality Official Community Plan Bylaw No. 282, Consolidated Dec. 2014:

"...to complete an Economic Development Plan that will examine short and long-term issues, needs and opportunities to enhance existing and new businesses and associated employment that is complementary to the objectives of this OCP."

Objective

This findings report completes Phase 1 of the CED Plan to provide an understanding of Bowen's current CED outlook and a solid foundation upon which Phase 2 of the CED Plan - the Community Engagement Phase - will be built.

Process

The findings report is divided into seven main sections:

I: Executive Summary II: Objective and Background

III: Bowen Island Research IV: Comparator Communities Analysis

V: Bowen Island's Current CED Snapshot VI: Bowen's CED Outlook and Next Steps

VII: Appendices

The report includes a selection of demographic, socioeconomic and economic indicators from Statistics Canada Census Data 2001-2016, as well as information from a range of island and community strategies, plans, documents, and surveys from 2007-2020 to illustrate Bowen's current CED outlook.

Ten comparator community CED Plans were also examined to identify common themes and best practices. Following review, the communities of: **Gabriola**, **Ucluelet** and **West Vancouver**¹ were identified as key comparators as they are the **closest to Bowen Island in CED nature**.

¹ It is acknowledged that West Vancouver have some demographic differences to Bowen Island, however they are still a useful comparator because of the issues they face and their CED initiatives.

Key Findings

The statistical analysis illustrated the following key findings:

Demographics

The Statistics Canada 2016 Bowen Island Census recorded 3680 people living on Bowen Island. However:

- Low numbers in 0-4 years category, in comparison to 5-9 and 10-14, suggest a possible slowing birth rate.
- Low numbers between 15-39-year olds, in comparison to BC.
- Larger numbers in 50+ categories, particularly 50-59 and 60-69-year old categories in comparison to BC.

This shows an aging population which has impacts on housing, transport, employment, and healthcare.

Employment and Education

Bowen Island has a high level of employment and a well-educated workforce overall with nearly half of the working population holding a University certificate, diploma, or degree at bachelor level or above. However:

- Significant numbers of people likely working below their educational potential to remain in employment on island given the span of the top five on-island employers—3 out of 5 employers were Accommodation and Food—versus the top five fields of study—Business; Social and behavioural sciences and law; Architecture and engineering; Visual, performing arts and communications; and Health.
- Island lacking qualified tradespeople. Only 7.5% have an apprenticeship, trades certificate or diploma.
- Same issue in persons qualified in healthcare with only 7.5% choosing this discipline. However, healthcare is the second top rated job by industry on and off-island, and Bowen's third top employer.

Healthcare and trades are already in demand and, from the demographic insights, likely to increase.

Commuting

Target 4 of the CED Plan is the "Reduced need to commute" to further Bowen's ambition towards being a self-reliant, healthy, rural community. The Statistics Canada 2016 Bowen Island Census recorded:

- 1,170 people commuting to their usual place of work.
- Of these, 705 travelled off-island and 945 worked on Bowen with 480 working from home.
- More than 52% (615 commuters) travelled 60 minutes or more to get to work.

As the data does not distinguish between on-island and off-island travel for the travel times information, further data is needed to fully understand commuter journeys, destinations, and employment desires.

Housing Needs

As a Bowen-wide Housing Needs Assessment is currently being undertaken, this report focuses on household size and occupied dwellings by number of bedrooms. The Statistics Canada 2016 Census found:

- There were 1495 households on Bowen in 2016.
- The largest household category was two persons, with 610 in total. The second was one person, with 340 in total.
- The largest category of occupied private dwellings was 3-bedroom properties, with 620 in total. The second largest was 4+ bedroom properties, with 390 in total.

This suggests a discrepancy between household size and property size.

Population Mobility

The movement of people on and off Bowen has an impact on the island's culture, economic growth, housing, and demand for services. Information from the Statistics Canada 2016 Bowen Island Census found:

- There were 3095 non-movers between 2015 and 2016 (84.5%), versus 2065 between 2011 and 2016 (58.4%).
- 565 people moved between 2015 and 2016 (15.4%), versus 1465 between 2011 and 2016 (41.4%).
- Of these movers between 2015 and 2016, 260 people stayed on Bowen (7.1%) and 310 (8.5%) moved off-island.
- Of these movers between 2011 and 2016, 515 people stayed on Bowen (14.6%) and 950 moved off-island (26.9%).

Some surveys have been done to find out why people move to Bowen and why they might leave, but response rates were low.² To get a more accurate picture, further research is needed.

Growth Industries and Bowen Businesses

Understanding Bowen's on-island businesses is important for businesses retention and growth strategies. Data from Statistics Canada January 2020 Labour Market Statistics on BC's top five growth industries and Bowen Island Business License Data 2019 on Bowen's current top five business types by industry revealed:

- Of Bowen's top five businesses, the only one also represented in BC's top five growth industries is healthcare.
- Bowen has a heavy slant towards accommodation and food related businesses, which is not represented in BC's top five growth industries. Further research is needed to see if these results reflect our unique island needs or if there is a disconnect between Bowen Island and BC's trends.
- It should be noted that two of Bowen's largest employers, Bowen Island Municipality (45.7 employees) and Bowen Island Community School (52 employees) are not represented as they do not require business licenses.

Tourism

Tourism is a growing industry with BC seeing over 6 million international visitors in 2018 alone. This has huge impacts on revenue and job creation. Bowen has also seen rising numbers in visitors over the past few years. These are the 2015-2019 increases recorded by BC Ferries and the Bowen Island Visitor Centre:

- BC Ferries saw a 17.5% increase between 2015 and 2019 rising from 158,358 full-fare passengers to 186,079.
- In comparison, the Bowen Island Visitor Centre saw an increase between 2015 and 2019, rising from 6,347 visitors to 31,096 and their services have increased year on year.

BC Ferries data only defines the difference between full-fare and Experience Card users, not visitor types. The visitor centre also does not record this. Further information is needed to better understand visitor types and duration e.g., daytrips, longer stay tourists, visiting relatives etc.

It should be noted that concerns have been raised by residents regarding the effects of increasing visitors to the island which need to be considered in conjunction with any CED activities and initiatives.

Economic Leakage

Economic leakage is money that "leaks out" of the local economy through expenditures on goods and services, for example off-island shopping and "bought in" services like food provision and trades. It's important to understand economic leakage as these areas can create jobs and business opportunities. Initial analysis of shopping preferences through the Bowen Island Survey 2019 revealed:

- 217 respondents reported buying their groceries on Bowen, and 296 also bought their household supplies on Bowen.
- 276 choose to Bowen for recreation and entertainment and 356 for meals and dining out.
- 150 respondents reported buying their health and beauty supplies on Bowen with 448 preferring to buy off island.
- 95 respondents bought clothing or apparel on Bowen with 563 preferring to buy off island and 149 preferring mail order and online.

Further data is needed to understand the full extent of economic leakage on Bowen Island.

Assets and Asset Gaps

Asset mapping identifies what positive resources the community has available to it at the present time and where any asset gaps might be. For Bowen Island, local knowledge and previous consultation were used to identify the following key assets and asset gaps:

- Wide variety of community groups and amenities; Abundant natural beauty; Unique businesses and restaurants; Unique, nurturing, welcoming, safe culture; Importance of Community; Close but not too close to the city.
- Infrastructure and amenity needs such as affordable housing, sustainable transport (including the ferry), and healthcare; On-island employment and business resiliency needs; Population gaps; Requirement for more communal gathering spaces; Better Municipality communications and policies; Cost of living issues.

Documents and Consultation

The document and consultation research included reviewing the OCP and LUB for conflicts, plus all of our strategies and plans, and past consultation exercises between 2007 and 2020 for key activities, objectives and issues to understand what has taken place, is taking place, or is needed or programmed, to identify linkages. Three key themes emerged. These were:

- Economic sustainability with a focus on business expansion and retention, and strategic tourism.
- Community resilience with a focus on infrastructure, business resilience and food growing initiatives.
- Quality of life with a focus on protecting our culture and natural environment, placemaking opportunities and development, employment and demographic opportunities, and community health and wellbeing.

Comparator Communities and Key Learning Points

Like Bowen, many of our comparators are facing aging populations and a need for business retention and growth strategies, including strategic tourism. The key learning points from the review of the key comparator CED Plans of Gabriola, Ucluelet and West Vancouver were:

- All plans focused on importance of community, local businesses, and strategic tourism.
- Consultation processes and plan development were generally short and with focused groups.
- CED initiatives tied in with strategic missions and values and were backed by the community and governing body.
- Consultants and additional help were used where necessary to aid consultation and development processes.

Bowen's CED Outlook

There's no doubt that Bowen Island has an abundance of key assets that make it a desirable place to be, especially amongst older age groups. However, like many of our comparators, the research reflects that more needs to be done in terms of:

- Sustainable Tourism
- Living and working within our community
- Demographic gaps

- Local business resilience, retention, and expansion strategies
- High cost of living
- Improving our community's overall quality of life

The findings also show that the following additional information would be beneficial to the development of the CED Plan:

- Economic Leakage Study e.g., household, business and government spending off-island
- Employment Information e.g., on-island jobs and income, commuting
- Tourism Information e.g., visitor data

- Community Information e.g., population mobility, quality of life
- Business Retention and Expansion Surveys
- Housing Needs Assessment Data

However, the finding reflected at the core of all the research was one main theme: **Bowen Island is unique.** No-one can quite compare to Bowen's uniquely rural island, yet municipality-run nature, just a stone's throw away from Vancouver—one of the world's top fifty cities.

And so, if we are to retain Bowen's unique nature, we must develop a CED Plan that not only provides for our resilient and sustainable future, but one which encourages our community to thrive as an independent, rural, island community.

Next Steps

The next step is to undertake Phase 2 of the CED Plan – the Community Engagement Phase - which will:

- Build on these findings to encompass the comprehensive community engagement already undertaken.
- Provide further community input upon which Phase 3 CED Plan Development will be built.

In this way, Bowen's community will be an integral part of the CED Plan to ensure it stays true to the promise made in our Official Community Plan and, above all else, our "Bowen-ness", as we work towards our vision of Bowen Island as a resilient and sustainable Island Municipality within the Islands Trust.

"This place is truly special - let's keep it that way!"3

³ Bowen Island Survey 2019

II: Objective and Background

Objective

This findings report completes Phase 1 of the CED Plan to provide an understanding of Bowen's current CED outlook and a solid foundation upon which Phase 2 of the CED Plan - the Community Engagement Phase - will be built.

Background

The Bowen Island Community Economic Development (CED) Plan was funded by the fifth intake of the BC Government's Rural Dividend Program.

Community Economic Development (CED) focuses on creating strong, healthy, resilient communities where community benefits come first, as opposed to traditional economic development which focuses on wealth creation where community benefits come second. CED uses local resources in a community-centered way to foster social, ecological, cultural, environmental, and economic resilience.

This community-centric approach is important for Bowen Island as it enables us to advance our community's ambition to be a resilient and sustainable Island Municipality within the Islands Trust as we deliver on Policy 409 in our Official Community Plan:

"...to complete an Economic Development Plan that will examine short and long-term issues, needs and opportunities to enhance existing and new businesses and associated employment that is complementary to the objectives of this OCP".

This findings report completes Phase 1 – Background Research - of this CED plan.

The findings report focuses on both past and present Economic Development information and activities taking place on Bowen Island and those of our comparator and nearby communities to provide an initial snapshot of Bowen's current CED outlook.

To do this, a number of background documents were reviewed including, but not limited to:

- Bowen Island Municipality Economic Development Action Plan 2014-2015
- Bowen Island Municipality Official Community Plan Bylaw No. 282, Consolidated Dec. 2014
- Bowen Island Municipality Land Use Bylaw No. 57, Consolidated May 2019
- Advancing Arts and Culture on Bowen Island 2017-2027 Master Plan
- Bowen Island Transportation Plan 2018-2038
- Bowen Island Parks Plan 2018-2028
- Bowen Island Draft Tourism Plan 2013.⁴

⁴ See Appendix for full list

Alongside these, research into the following comparator and nearby communities' CED plans was undertaken:

- Gabriola Island
- West Vancouver
- Squamish-Lillooet Regional District
- Lantzville
- Malcom Island

- Ucluelet
- Sparwood
- Hope
- Tofino
- Columbia-Basin Business Retention Plan

For the purposes of this report, the communities of: **Gabriola, Ucluelet** and **West Vancouver**⁶ were used as the main comparators as they are the closest to Bowen Island in CED nature.

Key CED Stakeholders were also identified and interviewed to gain their insight into CED initiatives and activities undertaken throughout the years. These stakeholders were selected based on their participation in key CED influencer groups such as:

- Community Economic Development Committee⁷
- Tourism Bowen Island
- Bowen Island Chamber of Commerce.⁸

Key insights from their interviews can be found in the Appendix. In addition to this, information from various qualitative and quantitative sources such as:

- Statistics Canada
- Revenue Canada
- BC Labour Force Surveys
- Work BC
- Trading Economics
- Bowen Island Municipality Survey

Previous community consultation exercises: Vital Conversations, Bowen Island Visitors, Residents' and Business Surveys, CEDC Business Summit 2019 and Business Engagement Sessions and the Community Lands Workshop were also collected and assessed. 9

The information gathered provided a snapshot of Bowen's current CED outlook which will be used to inform the development of Phase 2 of the CED Plan – the Community Engagement Phase.

⁵ Chosen because they have completed CED Plans as at the time of review

⁶ It is acknowledged that West Vancouver have some demographic differences to Bowen Island, however they are still a useful comparator because of the issues they face and their CED initiatives.

⁷ Formerly the Economic Development Advisory Committee

⁸ Historical data. Group now dissolved.

⁹ For a full list of statistical and information sources, please refer to the Appendix.

III: Bowen Island Research

Demographics

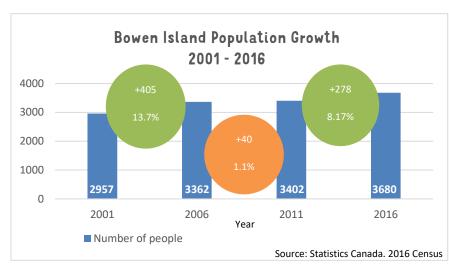
Population

Understanding Bowen's population is key to identifying trends and future needs.

Using information from the 2001 to 2016 census data from Statistics Canada, the following breakdowns explain population growth and age distribution trends for Bowen Island including key comparisons to BC averages.

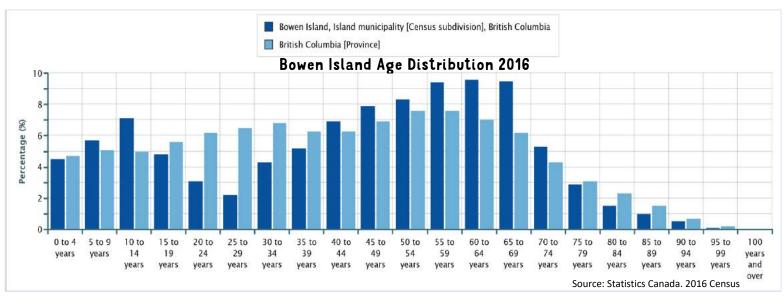
Key Findings

- Large growth spikes in 2001-2006 and 2011-2016 well above BC averages, with a flat growth period 2006-2011.
- Low numbers in 0-4 years category, in comparison to 5-9 and 10-14, suggest a possible slowing birth rate.
- Low numbers between 15-29 years in comparison to BC, suggests people leaving Bowen at high school / early working age.
- Decline in 30-39-year olds on Bowen compared to BC.
- These two age groups: 15-29 and 30-39, represent half of Bowen's workforce age population (25-54 years), so this decline will have a significant impact on our economy.
- Largest age group is 60-69. This group is 20.8% of Bowen's population in comparison to BC's at 13.2%. For context, in 2011, Bowen's 60-69 group was 15.5%, in 2006 it was 11.3%.
- Similar **large numbers** in 50-59 age group (17.7% overall). Showing the aging trend is likely to continue for the next 15-20 years which has implications for various key community services e.g., housing, transport, employment, and healthcare.



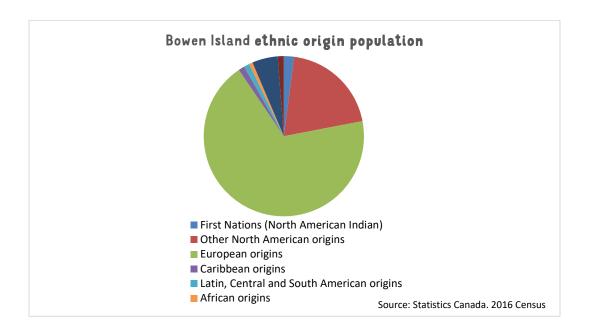
BC's Population Growth Rate		
2001-2006	5.4%	
2006-2011	7%	
2011-2016	5.6%	

	Median Age		
	Bowen Island	ВС	
1991	36.8	34.7	
2001	41.2	38.4	
2011	46.3	41.9	
2016	48.7	43	



Our Island's Ethnicity

Answers to qualitative questions on the 2019 Bowen Island Survey indicated a concern for lack of ethnic diversity on the island. Therefore, further statistical research into Bowen's population origins using the 2016 Census information was undertaken to better understand this viewpoint.



Key Findings

- Bowen currently has a wide spread of Western origin cultures, particularly European and very few people identifying as First Nations or Indigenous origin.
- The largest ethnic origin category is people of European origins 90.5% (3,320 people). Of this 69.2% are British origin.
- The smallest ethnic origin category is people of African origins 1% (35 people).
- Only 24.9% (915 people) on Bowen report as being of Canadian origin
- 2.7% (100) are First Nations, 0.8% (30 people) are Métis and 0% are Inuit.
- 6.5% (240 people) report as being of a Visible Minority¹⁰. Of these, 1.5% are South Asian and 1% are Japanese.
- 87% (3200 people) speak English only
- 97.6% speak English as their first language and 96.1% speak English at home most often.
- 12.9% (475 people) speak English and French.
- 0% of people speak Aboriginal languages either as their mother-tongue, spoken at home or knowledge of.

¹⁰ The Employment Equity Act defines visible minorities as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour." e.g., South Asian, Chinese, Black, Filipino, Latin American, Arab, Southeast Asian, West Asian, Korean, and Japanese.

Socio-Economic Factors

Education Fields vs. Employment Industry

Fields of study and employment is important for understanding Bowen's on-island economy. The following data uses information from the Statistics Canada 2016 Census to illustrate education level and field of study of Bowen Island's working age population (25-64), then compares the top five employment industries for all workers (on-island and off-island) with the top five on-island employers by employee numbers, noting their industry, from the Bowen Island Business License data 2019.

Key Findings

- Nearly half of Bowen's working population has a University certificate, diploma, or degree at bachelor level or above.
- Top field of study is Business, Management and Public Admin with most specializing in Business and marketing.
- Second is Social Sciences and Law with most specializing in legal professions and studies.
- Third is Engineering and related fields with most specializing in Engineering.
- Only 7.5% have an apprenticeship, trades certificate or diploma. This is not represented in the top on-island employers that have a business license, though we know from anecdotal evidence that trades are a key on-island job.
- Only 7.5% going into health education, however this is the second top rated job by industry and Bowen's third top employer.
- Bowen's top employer is Doc Morgans, a full-service restaurant in the field of accommodation and food services.
- The second top employer is The Ruddy Potato Wholefoods Market, a store in the field of supermarkets and other grocery (convenience) stores.
- The third top employer is Orchard Recovery Centre Ltd., a residential substance abuse facility in the field of health care and social assistance.
- The employment data above represents approximately 25% of on-island employees that we have data for. It shows that many on-island employees are likely working either outside of their field of study or under their level of qualifications to retain on-island employment given the span of the top five employers versus the top five fields of study.

Bowen Island Education Stats			
Level of Education	%	Top 5 Fields of Study	%
University certificate, diploma, or degree at	48.7	1: Business, management, and public administration	14.3
bachelor level or above		Top discipline = Business, management, marketing, and related support services	13.3
University certificate or diploma below	6.8	2: Social and behavioural sciences and law	13.3
bachelor level		Top discipline = Legal professions and studies	4.0
College, CEGEP or other non-university	15.1	3: Architecture, engineering, and related technologies	9.5
certificate or diploma		Top discipline = Engineering	2.8
Apprenticeship or trades certificate or diploma	7.5	4: Visual and performing arts, and communications technologies	8.3
		Top discipline = Visual and performing arts	8.0
Secondary (high) school diploma or	18.8	5: Health and related fields	7.5
equivalency certificate		Top discipline = Health professions and related programs	5.8
No certificate, diploma, or degree	3.0	Source: Statistics Canada. 2016 Census	

Top 5 jobs by Industry	#	Top 5 Employers on island	#
(on-island and off-island jobs)	people		people
Total people working on-island and off-island	2100	Total people working on-island according to data	1014
1. Professional, scientific, and technical services	340	1. Doc Morgans (Accommodation and Food Services)	65
2. Health care and social assistance	250	2. The Ruddy Potato Wholefoods Market	60
		(Supermarket and other grocery stores)	
3. Educational services	220	3. Orchard Recovery Centre Ltd. (Health Care)	54
4. Construction	195	4. The Snug Café (Accommodation and Food Services)	36
5. Retail trade	150	5. Bowen Island Pub (Accommodation and Food Services)	30
Source: Statistics Canada. 2016 Census		Source: Bowen Island Business Licens	e data 2019

Level of Education - Highest certificate, diploma or degree for the population aged 25 to 64 years in private households - 25% sample data. This variable refers to the highest level of education that a person has successfully completed and is derived from the educational qualifications questions, which asked for all certificates, diplomas and degrees to be reported.

Major field of study - Classification of Instructional Programs (CIP) 2016 for the population aged 25 to 64 years in private households - 25% sample data. This variable refers to the predominant discipline or area of learning or training of a person's highest completed postsecondary certificate, diploma or degree, classified according to the Classification of Instructional Programs (CIP) Canada 2016

Jobs by industry - Total labour force population aged 15 years and over by Industry – North American Industry Classification System (NAICS) 2012 - 25% sample data. Refers to the general nature of the business carried out in the establishment where the person worked. The data are produced according to the NAICS 2012

Employers on Island – Rated using Bowen Island Business License Data 2019 according to employee numbers and the (NAICS) 2012.

Limitations: Data based on business licensing data only. However, not all Bowen Island businesses have business licenses therefore Bowen Island Business License data is limited.

Business license data in place since 2019 so no established information. Further data needed.

Data does not include Bowen Island Municipality (BIM) or Bowen Island Community School (BICS) as both are government bodies thus exempt from the Business License program. BIM employs the equivalent of 45.7 FTEs making it the 4th top employer overall. BICS employs 52 in total with a mix of FTE and PTE making it the 3rd top employer overall.

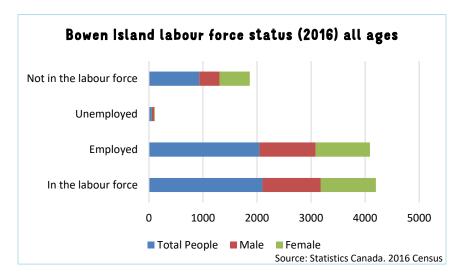
Further information needed to confirm employment levels versus education levels on-island.

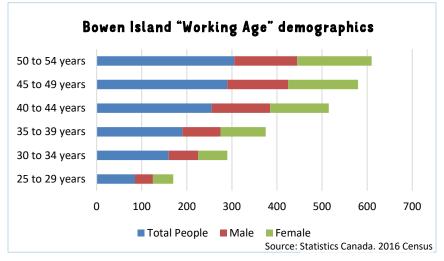
Employment Participation

According to the Organisation for Economic Co-operation and Development, prime working age is 25 years to 54 years.

Canada's current employment rate is 61.8%. Unemployment is 5.6%. In British Columbia, employment is slightly above national average at 63% and unemployment is below at 3.9 %.

For Bowen Island, it is not only important that we understand our employment rates but do so in context with our island's demographics to understand how many working age people we have available.





Key Findings

- Overall employment rate for Bowen Island 67.4% which is higher than both the Canada and BC rate.
- Overall unemployment rate for Bowen Island is 2.6% which is lower than both the Canada and BC rate.
- Overall male employment rate is 71.5% and unemployment is 3.7%.
- Overall female employment rate is 63.6% and unemployment is 1.5%
- Relatively even split of males and females in all working age categories however, there are significantly less people overall in working age categories 25-39 years which speaks to Bowen's aging population.

Limitations: Data does not distinguish between on-island and off-island employment rates.

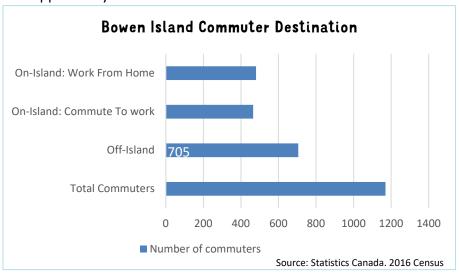
Further information needed to understand on-island employment levels and ages as anecdotal data suggests people on island work past the age of 54.

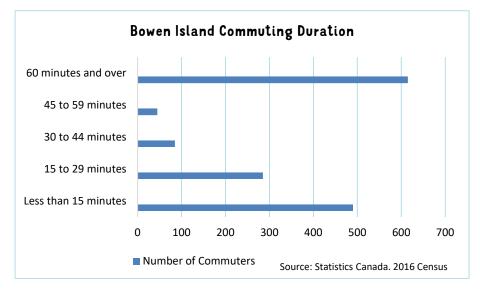
Commuting

Research from the University of Bristol found that adding twenty extra minutes to a commute is equivalent to taking a 19% pay cut, ¹¹ whilst researchers from the University School of Medicine in Saint Louis found that people with commutes of at least 10 miles each way have a higher tendency toward depression, anxiety, and social isolation. ¹²

Target 4 of the Rural Dividend grant application for the CED Plan is the "Reduced need to commute" to further Bowen's ambition towards being a self-reliant, healthy, rural community.

To achieve this, it is important for us to understand where people are going, how long it's taking them to get there and, whether they would switch to working on Bowen (if they currently work off-island) should the opportunity arise.





Key Findings

- According to the Statistics Canada 2016
 Bowen Island Census, 1,170 people were recorded as commuting to their usual place of work.
- Of these commuters, 705 travelled off-island.
- On-island, 465 travelled in to work and 480, worked from home.
- 775 (66%) had commutes of less than 30 minutes.
- 615 (52%) commuters had commutes of 60 minutes or more.

Limitations: Data does not distinguish between on-island and off-island commuting. Further information needed to clarify commuting information and desires.

¹¹ Source: Understanding Impact of commuting on people's lives: University of the West of England (Bristol)

¹² Source: 10 Things Your Commute Does to Your Body https://time.com/9912/10-things-your-commute-does-to-your-body/

Employment Income

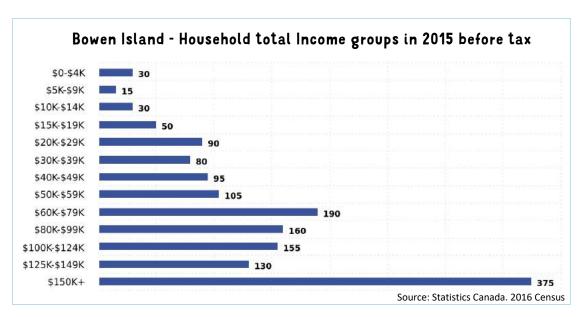
Household income figures are pertinent to a CED findings report as it is households that pay for food, shelter, transportation, health care, housing, clothing, entertainment etc.

With a population at 3,680 people, most households on Bowen Island were above the low-income cut-off, or the income a person must earn to be considered "low-income" as per Statistics Canada's low-income chart¹³, in the 2016 Census. Up to date information is needed to see if this was still the case.

The data below shows how many Bowen Island households fall in each of the income brackets specified by Statistics Canada. These statistics are for all workers, whether on-island or off-island. However, it should be noted that household size greatly affects income levels.

Key Findings

- The top three household income group levels for Bowen Island are over \$80,000 representing 725 households of 1495 (48%).
- The bottom three household income group levels for Bowen Island are over \$14,000 representing 75 households of 1495 (5%).
- Average total income of households in 2015 was \$124,029.
- Average total income of one-person households in 2015 was \$46,450.
- Average total income of two-or-more-person households in 2015 was \$146,855.



Household total income groups in 2015 for private households - 100% data. In the context of households, total income refers to receipts from certain sources of all household members, before income taxes and deductions, during a specified reference period.

Limitations: Data does not specify between income earned on-island and income earned off island. Further data needed to better understand actual on-island earned income levels for households and individuals.

¹³ https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1110024101

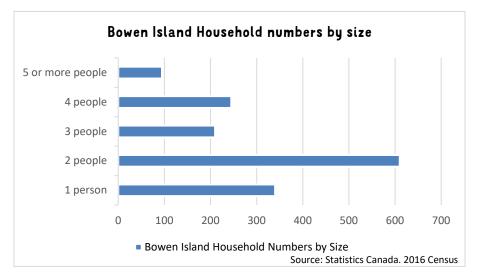
Housing Needs

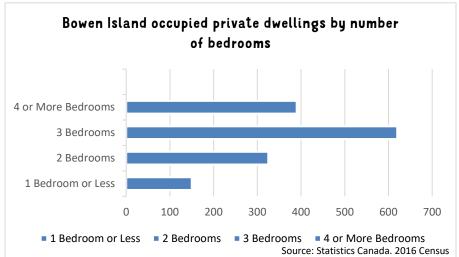
The increase of quality of life is one of the main aims of sustainable community economic development. Within this, appropriate housing is one of the major issues affecting quality of life.

At time of writing, a Bowen-wide Housing Needs Assessment is being undertaken by an external consultant. To avoid repetition, this report uses information from the Statistics Canada 2016 Census on two key areas: household size and occupied dwellings by number of bedrooms to identify potential arising CED needs in relation to the other CED areas identified in this report.

Key Findings

- There were 1495 households on Bowen in 2016. The largest household category was two person households with 610 people.
- The second largest household category was one person households with 340 in total.
- The largest category of occupied private dwellings was 3-bedroom properties with 620 in total.
- The second category of occupied private dwellings 4 or more-bedroom properties with 390 in total.
- This suggests a discrepancy between household size and property size.





Awaiting further information from Housing Needs Assessment for full extent of housing needs impact.

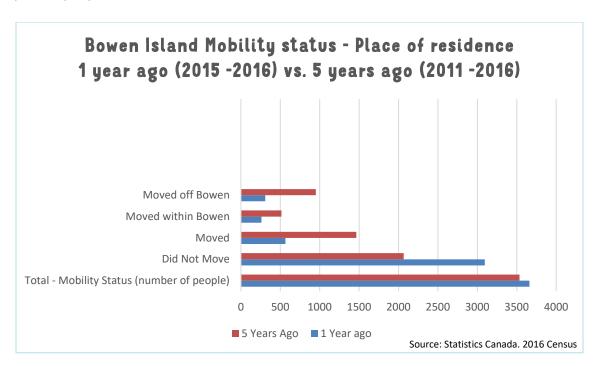
Population Mobility

Population mobility measures migration within a population. For Bowen, the movement of people on and off the island has a large impact on many sociological factors including the island's culture, economic growth, housing markets and demand for services, to name but a few.

Some base research has been done to find out why people move to Bowen and why people might leave through the Bowen Island Municipality Island Surveys, the Bowen Island Residents Survey 2015 and the recent Island Trust State of the Islands Indicator Project, but response rates were low.¹⁴ In order to get a more accurate picture further research with specific questions is needed.

Key Findings

- There were 3095 non-movers between 2015 and 2016 (84.5%), versus 2065 between 2011 and 2016 (58.4%).
- 565 people moved between 2015 and 2016 (15.4%), versus 1465 between 2011 and 2016 (41.4%). That's approximately 8.28% per year.
- Of these movers between 2015 and 2016, 260 people stayed on Bowen (7.1%) and 310 (8.5%) moved off-island.
- Of these movers between 2011 and 2016, 515 people stayed on Bowen (14.6%) and 950 moved off-island (26.9%). That's approximately 5.38% per year.



Definitions: Persons who have not moved are referred to as non-movers and persons who have moved from one residence to another are referred to as movers. Movers include non-migrants and migrants. Non-migrants are persons who did move but remained in the same city, town, township, village or Indian reserve. Migrants include internal migrants, who moved to a different city, town, township, village or Indian reserve within Canada. External migrants include persons who lived outside Canada at the earlier reference date.

¹⁴ Bowen Island Survey 2019 204 / 3680 responses to "Quality of Life" feedback question = 5.5% Bowen Island Residents Survey 2015 response rate: 197 / 3680 = 5% Trust State of the Islands Indicator Project response rate: 82 / 3680 residents = 2%

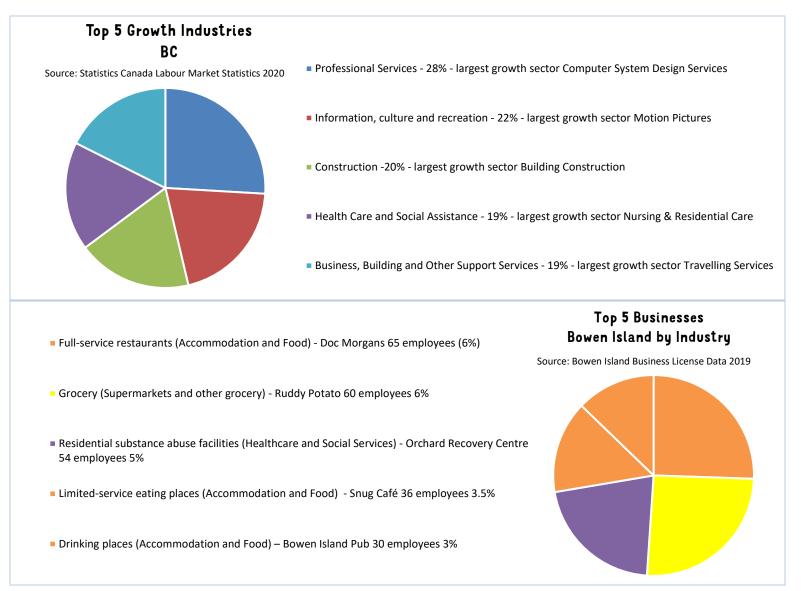
The Economy and Commerce

Growth Industries and Bowen Island Businesses

Understanding Bowen's on-island businesses is important for businesses retention and growth strategies. The following data from Statistics Canada Labour Market Statistics January 2020 and Bowen Island Business License Data 2019 compares BC's top five growth industries and Bowen's current top five businesses.

Key Findings

- Of Bowen's top five businesses, the only one also represented in BC's top five growth industries is healthcare.
- Bowen has a heavy slant towards accommodation and food related businesses, which is not represented in BC's top five growth industries. Further research is needed to see if these results reflect our unique island needs or if there is a disconnect between Bowen Island and BC's trends.
- It should be noted that two of Bowen's largest employers, Bowen Island Municipality (45.7 employees) and Bowen Island Community School (52 employees) are not represented as they do not require business licenses.



Top 5 Industries Bowen Island = total number of employees. Industry defined as per (NAICS) Classification System 2012

Limitations: Not all businesses have licenses therefore data limited. Business licenses in place since 2019 so no established information for on-island growth industries. Further data needed to identify on-island growth trends.

Tourism

In 2018, B.C. greeted nearly 6.1 million international visitors¹⁵ and there were over 19,000 tourism related businesses employing over 300,000 people. It is projected that 106,000 new tourism jobs will be available by 2028. The following tables compare visitor numbers from BC Ferries passenger fare information and the Bowen Island Visitor Centre visitor information collected between 2015 and 2019.

Key Findings

- BC Ferries saw a 17.5% increase between 2015 and 2019 rising from 158,358 full-fare passengers to 186,079.
- In comparison, the Bowen Island Visitor Centre saw an increase between 2015 and 2019, rising from 6,347 visitors to 31,096 and their services have increased year on year.

	BC Ferries		Bowen Island Vi	sitor Centre
Year	# visitors travelling to Bowen	Year	# visitors recorded at visitor centre	% of visitors served by visitor centre year on year
2015 - 2016	158,358	2015	6,347	4
2016 - 2017	161,669 (+2%)	2016	8,054 (+27%)	5
2017 - 2018	180,074 (+11%)	2017	14,071 (+78%)	8
2018 - 2019	186,079 (+3%)	2018	21,139 (+47%)	11
Source: I	BC Ferries Route 8. Full fare passengers only	2019	31,096 (+47%) Source: Bowen Island Municipality Visitor Centre Report 2013 and 2019	NO DATA

Limitations: BC Ferries data only defines difference between full-fare and Experience Card users not visitor types. Seniors and student fares not included as not defined into resident, visitor or other. The visitor centre also does not record this.

Further information needed to better understand visitor types and duration e.g., daytrips, longer stay tourists, visiting relatives etc.

Tourism Concerns Raised by Residents

It should be noted that concerns have been raised by residents regarding the effects of increasing visitors to the island. According to the Bowen Island Residents Perceptions of Tourism on Bowen Island Survey 2015, these were the **top three concerns raised regarding tourism**:

- 74.3% of respondents agreed that tourism has created crowding at ferry terminals.
- 30% felt tourism created user problems in some beaches, parks, and trails.
- 26.6% of those surveyed believed that tourism contributed to water shortages

Further data needed to assess if these concerns need to be considered in conjunction with CED initiatives.

¹⁵ https://www.vancouverisawesome.com/travel/bc-tourism-economic-force-2019-1942621

Economic Leakage

In terms of Community Economic Development, leakage refers to money that "leaks out" of the local economy through expenditures on goods and services.

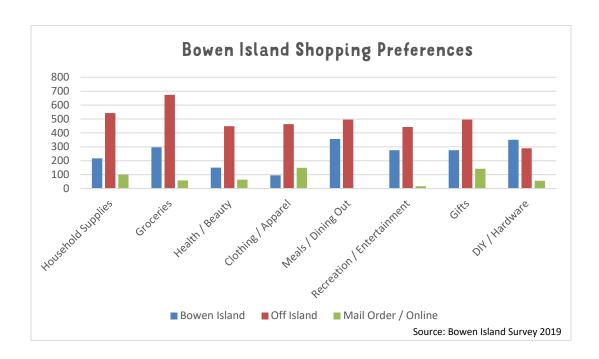
Examples of this for Bowen Island include off-island shopping, and "bought in" services such as food provision, trades, and digital support.

It is important to understand what level of economic leakage is occurring, as these areas can become job creators and business opportunities to create a more self-sufficient community. To fully understand this, a detailed household spending and economic leakage study would need to be undertaken.

As a start, initial analysis of shopping preferences was undertaken through the Bowen Island Survey 2019. 454 people responded to this question of a population of 3680 (at the 2016 Statistics Canada Census).

Key Findings

- 217 respondents reported buying their groceries on Bowen, and 296 also bought their household supplies on Bowen.
- 276 choose to Bowen for recreation and entertainment and 356 for meals and dining out.
- 150 respondents reported buying their health and beauty supplies on Bowen with 448 preferring to buy off island.
- 95 respondents bought clothing or apparel on Bowen with 563 preferring to buy off island and 149 preferring mail order and online.



Limitations: Survey captured 454 respondents. 2016 Census recorded population of 3,680. This is 12% of the population.

Further data needed to understand full extent of household and government spending, thus overall leakage.

Assets Analysis

Definitions

Community assets are the places, people, and groups existing within a community that are beneficial to that community.

Places can be a physical structure or place e.g., Churches, Schools, Police stations, Grocery stores, Local businesses, Parks, Libraries etc. They can also be a landmark or symbol.

People consist of anyone with gifts, skills and capacities that are beneficial to the community's economy. Basically, anyone who uses their abilities to build and transform the community.

Groups are any organization or association through which people come together to serve or benefit the overall community.

Process of asset mapping

Asset mapping includes identifying what positive resources the community has available to it at the present time and where any asset gaps might be. For Bowen Island, local knowledge and previous consultation information was used to identify key assets and asset gaps.

The full tables can be found in **Table 1: BI – Key CED Assets** and **Table 2: BI – Key CED Asset Gaps**.

Research Sources

- Vital Conversations 2014 and 2017
- Conversations with Bowen Businesses 2015
- Bowen Island Visitors' Survey 2015
- Bowen Island Residents' Survey 2015
- Community Lands Workshop 2018
- Interviews conducted with Key CED Stakeholders 2019¹⁶
- Bowen Island Survey 2019

The key assets and asset gaps were formed into two mind maps:

- Bowen Island Key Assets Map
- Bowen Island Key Asset Gaps Map

These will help identify SMART goals and opportunities as part the CED plan development in Phase 3. Please note, the list of assets and asset gaps is not exhaustive and will be expanded during Phase 2 - the Community Engagement Phase - and the later stages of CED Plan development.

¹⁶ See Appendix "CED Interviews"

Bowen Island Key Assets Map



Bowen Island Key Asset Gaps Map



CED Information and Document Analysis

Conflicts between the Land Use Bylaws and the Official Community Plan

Background

Research indicates that conflicting policies between the Bowen Island Municipality Official Community Plan (OCP) and the Bowen Island Municipality Land Use Bylaw No. 57 2002 Consolidated May 2019 (LUB) can be challenging and calls for OCP and LUB reviews have been made by various community members.

"OCP needs greater review to ensure its outcomes are consistent with contemporary community aspirations." 17

Process

Based on this, analysis of the LUB was undertaken to identify those sections which were inhibitive to the progression of CED activities and initiatives. These are outlined in the **Table 3 in the Appendix**.

In conjunction, analysis of the OCP was undertaken to understand Bowen's long-term vision for a sustainable future. These are outlined in **Table 4 in the Appendix**.

This analysis was cross-referenced and grouped into three core CED themes to understand where the key conflicts lie between the OCP and the LUB. In addition, sub-themes were identified noting the individual key conflicts and arising issues. These are below.

It should be noted that the tables below only note the conflicts or arising issues between the OCP and the LUB. Suggestions for possible actions and improvements come at a later stage in the CED Plan Process.

Key Conflicts and Arising Issues between OCP and LUB

Economic sustainability		
Existing business needs	Local retail	
OCP supportive of business growth, especially artists and artisans. Conflict: LUB restrictions e.g., usages, employee numbers for home use, commercial development outside the Cove etc.	OCP encourages retail of various kinds. Conflict: LUB restricts unit sizes, usages, commercial development outside the Cove etc.	
Emerging opportunities / growth sectors OCP supportive of key growth sectors e.g., health and wellness, food growing, artisans Conflict: LUB restrictions e.g., size limitations, zoning etc.	Strategic tourism OCP supports eco-tourism and low impact tourism. Conflict: LUB restrictions room numbers, land-use, zoning, commercial development outside the Cove etc.	

¹⁷ Bowen Island Survey 2019

Community resilience		
Infrastructure and amenities OCP supportive of affordable housing Conflict: LUB restrictions on land-use regarding tiny houses, number of buildings and zoning.	Business resilience No conflicts. Arising Issue: Little inclusion of business resilience in either document.	
Food growing initiatives Both OCP and LUB support agriculture and food growing initiatives. Arising Issue: Crop growing not accounted for as part of sustainable food measures.	Communications Systems No conflicts. Arising Issue: Little inclusion of sustainable communication systems in either document.	

Quality of life		
Protecting our natural environment No conflicts. Both documents speak to protecting our natural environment. Arising Issue: Both OCP and LUB will need to tie into upcoming environmental / climate strategies.	Placemaking plans for better lives. No conflicts. Arising Issue: Little inclusion of placemaking development principles in either document.	
Employment and income opportunities OCP is encouraging of on-island employment. Conflict: LUB restrictions e.g., home occupation employee restrictions	Demographic opportunities – marginalized groups OCP supports a more inclusive community. Conflicts: LUB restrictions e.g., land use, zoning etc.	
Demographic opportunities – diversity OCP supports a more diverse community. Conflict: LUB restrictions e.g., land use in terms of affordable housing development, home occupation restrictions etc.	Community health and wellbeing OCP supports a more active and healthy community Conflicts: LUB restrictions e.g., land use, zoning, size limitations, number of buildings etc.	

Other Bowen Island Documents: Strategies, Plans and Past Consultation

In addition to the LUB and the OCP, the following documents were reviewed:

Research Sources

Strategies and Plans		
Tourism Plan 2007 and 2013	EDC Action Plan 2014-2015	
Bowen Island Brand Research 2015	Bowen Island Cultural Masterplan 2017-2027	
Bowen Island Parks Plan 2018-2028	Bowen Island Transportation Plan 2018-2038	
Island Plan 2019		
Consultation Exercises		
Vital Conversations 2014, 2017	BI Visitors Survey 2015 and Residents' Survey 2015	
Bowen Businesses Conversations 2015	CEDC Business Engagements and Business Summit 2019	
Community Lands Workshop 2018	Bowen Island Survey 2019	

Process

Key CED activities, objectives and issues from each strategy, plan and consultation exercise were identified to understand what activities have taken place, are taking place, or are programmed, and to identify the linkages between them.

The full analysis for the strategies and plans is outlined in **Table 5 in the Appendix**.

The full analysis for the consultation documents is outlined in **Table 6 in the Appendix**.

The summary of overarching themes from all the documents was grouped into the same three core CED themes as the OCP and LUB analysis for cross referencing purposes. In addition to these, arising sub themes were identified which will be used to map out potential CED opportunities and identify SMART goals for the progression of the CED plan.

Please note, this list is not exhaustive and will be expanded during Phase 2 - Community Engagement Phase - and the later stages of CED Plan development.

Key Theme 1: Economic sustainability

"I think there is a balance between the economic need for tourism and attracting so many visitors that it diminishes the cohesiveness and accessibility of resources for residents." 18

Definition

Economic sustainability is any activity which supports long-term economic growth with minimum negative impact on the social, environmental, and cultural aspects of the community.

Sub themes

Existing businesses: non-retail

Additional opportunities needed to share/exchange:

- Information / resources
- Best practice
- Mutually supporting growth opportunities

Existing businesses: retail

Additional support needed for:

- Buying local
- Business visibility
- · Boosting local retail

Emerging opportunities / growth sectors

Recognising Bowen's key growth sectors for:

- Employment opportunities
- Business retention and expansion
- Plugging economic leakage gaps

Strategic tourism

Recognising tourism as a benefit to Bowen Island for:

- Year-round revenue for a wide range of businesses
- Year-round, on-island employment opportunities
- · A mechanism to leverage island-wide funding

¹⁸ Bowen Island Survey 2019

Key Theme 2: Community resilience

"When we need help, we ask and are fully supported." 19

Definition

Community resilience is the ability of a community to use available resources (communications, transport, food, etc.) to respond to, withstand, and recover from adverse situations.

Sub themes

Infrastructure and amenities

Additional support needed for our partners in:

- Promotion and delivery of current strategic plans relating to CED e.g., sustainable transport, affordable housing, sustainable water systems, environment protection etc.
- Futureproofing infrastructure and amenities for a sustainable and resilient community.

Business resilience

Additional support needed for our partners in:

• Emergency Response Program in relation to business resilience before, during and after emergency / disaster e.g., helping businesses continue to operate in short, medium, and long term.

Food growing initiatives

Recognising and supporting Bowen Island Food Sovereignty's "Resilient Food System for Bowen Island" to provide:

- On-island, sustainable food sources to reduce reliance on external food sources.
- Year-round, on-island employment opportunities.
- A mechanism to leverage island-wide funding for food-based initiatives.
- Support for our local farmers, growers, and food suppliers.

¹⁹ Why and How Bowen Does Business – Conversations with Bowen Businesses 2015

Key Theme 3: Quality of life

"Unfortunately, we are becoming a two-tiered community of haves and have-nots, and the quality of life for those two groups is drastically different."20

Definition

The quality of life of a community is their general well-being. It includes health, family, education, employment, wealth, safety, freedom, and the environment.

Sub themes

Protecting our natural environment

Additional support needed for our partners in:

• Delivering environmental initiatives that improve overall quality of life e.g., sustainable transport, affordable housing, parks and greenspaces, sustainable water systems and environment protection.

Placemaking for better lives

Recognising and supporting opportunities for:

• Placemaking, zoning and land-use that support quality of life initiatives e.g., walkable and multi-use developments, streetscaping, community gathering spaces etc.

Employment and income opportunities

Recognising and supporting opportunities for:

- Sustainable, well-paid, on-island employment.
- Reduction in commuting to support well-being.

Demographic opportunities

Additional support needed to:

- Support our on-island youth and senior population to live and work on Bowen.
- Help low-income families and workers address cost of living issues through innovative CED initiatives.

Community health and wellbeing

Additional support needed for our partners in:

- Development of cohesive healthcare and recreation opportunities.
- Identifying healthcare gaps.

Protecting our Island's culture

Recognising and supporting opportunities for development of:

• Community gathering spaces, parks and community-based activities and initiatives to support CED.

²⁰ Bowen Island Survey 2019

IV: Comparator Community CED Plan Analysis

Comparator communities' CED Plans and strategies were reviewed to examine their CED approach to identify common themes and best practices.

The following comparator communities were chosen as they all had CED Plans or strategies completed at time of review.

Comparator Communities

- Gabriola Island
- Ucluelet
- West Vancouver
- Sparwood
- Squamish-Lillooet Regional District
- Hope
- Lantzville
- Tofino
- Malcom Island
- Columbia-Basin Business Retention Plan

Process

Following review, the communities of: **Gabriola, Ucluelet** and **West Vancouver²¹** were identified as key comparators as they are the **closest to Bowen Island in CED nature**.

Five main CED comparator points were used to provide a CED snapshot of each key comparator to provide useful comparison to Bowen Island.

Main CED comparator points

- Community "make-up" i.e., demographics, employment, economy etc.
- Top CED principles
- CED Structure i.e., funding, municipality, chamber of commerce, CEDO (FTE / PTE) etc.
- Engagement activities undertaken to develop CED Plan / Strategy
- Key learning points

The full breakdown of each key comparator community is the Appendix under **Key Comparator Communities.**

²¹ It is acknowledged that West Vancouver have some demographic differences to Bowen Island, however they are still a useful comparator because of the issues they face and their CED initiatives.

Gabriola

CED Snapshot in a sentence

Aging, stagnant population with a CED focus on branding, tourism marketing and population attraction.

Community "Makeup"

Based on their 2017 CED Plan, key conclusions from Gabriola's economic analysis include:

- Stagnant population growth. 2016 population decreased by .03% since 2011 (4045 to 4033)
- Aging population and loss in what looks like families.
- More people now living on the island full-time rather than summer homes: 49 less homes in 2016 than 2011. 19 houses built over the past 5 years that are private dwellings.
- 48.5% unemployment rate
- Top 3 occupations: Retail trade, Professional, scientific, and technical services, Construction

Gabriola's top 5 CED principles

Gabriola's CED mission is "to develop a robust Island economy that thrives within the culture Gabriolans cherish. We will provide tools and resources to create a community working in concert to improve our entrepreneurial capacity."

Their top CED objectives are:

- Strategic tourism and branding: Create a brand to strategically market culture and climate of Gabriola.
- **Develop strategic economic initiatives that speak to their community:** e.g., asset inventory, population growth, funding, small business growth for artisans and youth.
- **CED Plan delivery:** Develop a formal model for the delivery of their Economic Development Plan governed in partnership with their Chamber of Commerce.

Key Learning Points

- Consultation process was short and with focused groups.
- Plan development feedback process was likewise short and focused.
- Gabriola did not already have a community brand, so they were "starting from scratch". Bowen has already developed the "Bowen brand".
- Focus on tourism and branding.
- CED Plan and initiatives tie in with overall strategic missions and values.
- Full-time CED officer with additional support where necessary to aid consultation and development processes.

Ucluelet

CED Snapshot in a sentence

Youthful population with high employment and a CED focus on growing existing industries of tourism and marine activity, plus potential growth opportunities, to retain population.

Community "Makeup"

Based on their 2014 CED Plan, key conclusions Ucluelet's economic analysis on includes:

- Steady population growth over last 30 years.
- Youthful adult population, significantly more residents in prime working-age of 25-54 yrs.
- Median employment incomes are lower than BC average, largely due to seasonality.
- Top 3 occupations: Accommodation and food, Retail trade, Agriculture, forestry, fishing and hunting.
- High number of college graduates. Strong cluster of arts and communications graduates.
- Estimated 60% of residents' everyday spending is in Ucluelet. Key desires are more affordable food and clothing, and a greater variety of goods and services.
- Tourism is viewed as the most important future industry.

Ucluelet's top CED principles

Ucluelet do not have a CED Plan vision. However, their overall community vision is: "Ucluelet's built and natural environment respects, above all, the outstanding diverse natural habitat and optimizes recreational opportunities for its citizens and its visitors. Ucluelet residents enjoy a high quality of life built upon a sustainable and diversified local economy."

Their top CED Plan objectives are:

- Realign economic development structure and tools. The framework for implementing CED.
- Invest in Ucluelet's human potential. Supporting Ucluelet's population to live and work.
- Enhance physical infrastructure for economic development. Providing the infrastructure for CED initiatives e.g., employment, land use, transport, and telecommunications.
- Capitalize on harbor related opportunities. Harbour-related strategies to support one of Ucluelet's main sources of industry.
- Pursue targeted economic development opportunities. Existing and potential business opportunities.

Key Learning Points

- Like Gabriola, Ucluelet's consultation process was short and with focused groups.
- Plan development feedback process was likewise short and focused.
- Ucluelet used consultants to carry out the consultation and plan process.
- Focus on people and businesses.
- CED Plan ties in to Ucluelet's overall strategic missions and values, and is backed by their Council.

West Vancouver

CED Snapshot in a sentence

Aging, bedroom community with affordable housing issues, with a CED focus on strategic tourism and growth opportunities to attract employment and business growth.

Community "Makeup"

Based on their 2018 CED Plan, key conclusions West Vancouver's economic analysis includes:

- Aging population with decline in working age population.
- Large portion of workers do not live in West Vancouver they commute.
- Housing shifting away from single family homes to smaller, apartment style homes.
- Lack of affordable housing 37% had family or friends move due to lack of affordable housing options.
- 44.2% unemployment rate.
- Top 3 occupations: Professional, scientific, and technical services, Health care and social assistance, Retail trade.
- High proportion of residents working in arts, entertainment, and recreation industries.

West Vancouver's top CED principles

West Vancouver's vision is "West Vancouver will inspire excellence and lead by example. Collaborative government and a spirit of personal civic commitment will power the innovations that shape our shared future. The strength of this relationship will secure our treasured quality of life and will be the measure of our success as a community."

Their top CED objectives are:

- Value of tourism and visitor attraction strategy: Support existing West Vancouver businesses by attracting visitor spending at a time when the local population and local market are declining, value of tourism and visitor offerings.
- **Commercial Hubs:** Create opportunities for new business start-ups and grow local employment opportunities. Identifying Commercial Areas: Hierarchy, Role, and Function to encourage growth.
- Local Attraction and Retention Strategy: Broaden the municipal tax base, Regional Economic Growth, Innovation and Entrepreneurial Ecosystems.

Key Learning Points

- Consultation process was with focused groups. Their identification of these key groups was instrumental in their consultation process and subsequent CED initiatives.
- Plan development feedback process was likewise short and focused.
- Focus on people, businesses, and tourism.
- CED Plan ties into West Vancouver's overall strategic missions, other departmental activities and is backed by their Council.
- Full-time CED Officer with additional support to aid consultation, development, and implementation.

V: Bowen's Current CED Snapshot

Based on the research outcomes, we can now identify Bowen's CED Snapshot. The following table represents this as a SWOT analysis. It is by no means an exhaustive list but gives us crucial key insights for the development of the CED Plan. On the next page is a visual representation of this snapshot.

Strengths	Opportunities
 Safe, desirable community with supportive culture The "do-able" Gulf Island e.g., proximity to Vancouver. Substantial support for sustainable practices Large variety of diverse businesses, organizations, and groups Wide range of community assets Not starting CED process from scratch: OCP, Island Plan and key strategies in place, lots of past consultation with clear guidance on community needs 	 Business expansion and retention opportunities Employment and volunteering opportunities Strategic Tourism opportunities e.g., Environmental and Low-Impact Tourism, Island "packages", linkages to Vancouver Placemaking and development opportunities for a "better Bowen Ongoing opportunities for economic, environmental and community sustainability and resilience e.g., food growing initiatives, climate change strategies, Active Transportation Plan etc.
Weaknesses	Threats
 Cost of Living Business resiliency – Proximity to Vancouver (economic leakage), Costs, Lack of affordable housing particularly for employees etc. Aging demographic Lack of "Walkability" e.g., limited footways / trails etc. Lack of diversity? Restrictive policies not conducive to economic sustainability 	 Climate / Demographic / Island related challenges Increases in minimum wage and costs directly affecting small businesses Changes to Policy affecting business and economy Local: e.g., Short Term Rentals, Step-Code Government: e.g., Changes to funding: Rural Dividend BC Ferries e.g., upgrades to HSB, overloads, insufficient capacity etc. Competition for the ever scarcer young worker Crown Lands Issue – what is going to happen? Proximity to Vancouver e.g., visitors, off-island shopping—threatening our way of life



VI: Bowen's CED Outlook

CED Snapshot in a sentence

Aging population with slowing birth rate and gaps in young working age population however, huge potential for strategic tourism, business growth and retention opportunities, and innovative CED practices using abundance of key assets to support and grow a sustainable Bowen Island for generations to come.

Summary

As the research shows, Bowen Island has an abundance of key assets that make it a desirable place to be, especially amongst older age groups. However, like many of our comparators, the research also reflects that more needs to be done in terms of:

- Sustainable Tourism
- Living and working within our community
- Demographic gaps

- Local business resilience, retention, and expansion strategies
- High cost of living
- Improving our community's overall quality of life

"[Bowen is] great for retirees like us who bought our property a while ago. Hard for commuters and low-income people."22

The findings further show that the following additional information would be beneficial to the development of the CED Plan:

- Economic Leakage Study e.g., household, business and government spending off-island
- Employment Information e.g., on-island jobs and income, commuting
- Tourism Information e.g., visitor data
- Community Information e.g., population mobility, quality of life
- Business Retention and Expansion Surveys
- Housing Needs Assessment Data

However, the finding reflected at the core of each strategy, plan and consultation exercise was one main theme:

Bowen Island is unique.

So, whilst we have similar CED focus areas to many of our comparator communities, and they can offer up useful insights for CED Plan development, none of them can quite match Bowen's uniquely rural island yet municipality-run nature. The fact we are also just a stone's throw away from Vancouver—one of the world's top fifty cities—adds another string to our unique bow and, of course, another CED challenge:

How to maintain Bowen's "Bowen-ness"?

²² Bowen Island Survey 2019

And so, if we are to retain Bowen's unique nature, we must develop a CED Plan that not only provides for our resilient future and sustainable, but one which encourages our community to thrive as an independent, rural, island community.

"This place is truly special - let's keep it that way!"23

Next Steps

The next step is to undertake Phase 2 – Community Engagement Phase - of the CED Plan.

Phase 2 will:

- Build on these findings to encompass the comprehensive community engagement already undertaken.
- Provide further community input upon which Phase 3 CED Plan Development will be built.

In this way, Bowen's community will be an integral part of the CED Plan development to ensure it stays true to Policy 409 in our Official Community Plan:

"...to complete an Economic Development Plan that will examine short and long-term issues, needs and opportunities to enhance existing and new businesses and associated employment that is complementary to the objectives of this OCP."

And, above all else, our "Bowen-ness", as we work towards our vision of Bowen Island as a resilient and sustainable Island Municipality within the Islands Trust.



Snug Cove Marina: Courtesy of Canadian Roadstories

VII: Appendices

Appendices - Tables

Table 1: BI - Key CED Assets

Bowen Island key CED Assets			
Places	People	Groups	Intangible
Mountains, Forests	Active Arts and Artisans Community	BIAC "The Hearth"	"Safe" environment
Accessible Trails and Walks	Active entrepreneur / business community	Tourism Bowen Island	Peaceful / rural – away from the hustle and bustle of the city
Parks, Environmental Reserve, Nature	Growing alternative Health and Wellness Industry	Community Foundation	Welcoming / Supportive community
Beaches, Ocean, and Marinas	Growing Professional and Technical Services	Knick Knack Nook	Strong sense of "community"
Unique Businesses and Restaurants: Snug Cove, Village Square, Artisan Square	Skilled Labour Force – contractors, craftspeople, artisans etc.	Volunteer Groups – many and diverse offering lots of opportunities to all sectors of community	Unique / Diverse culture
Golf Course – One of the best in BC!		Municipality Services	Improved Internet System
Museum and Archives		Municipality Committees	"Active" and "Oudoorsy" community
Library and learning Schools – BICS, IPS, Island Discovery etc.		Islands Trust BC Ferries	Great place to bring up kids Genuine people
Emergency Services – Fire, Police		Farmers' Markets, Craft Fairs	Sense of nurturing and calm
Churches		Community Events e.g., Canada Day, Bow Fest	Close but not too close to the city
Recycling Depot		Arts Events - concerts, galas etc.	
Food Bank		Lots going on / to do! – Cultural activities	
Unique neighbourhoods Lakes – Grafton, Killarney, Josephine etc.			

Table 2: BI - Key CED Asset Gaps

	Bowen Island key CED Asset Gaps			
Places	People	Groups	Intangible	
Affordable Housing – worker housing, rental housing, affordable home ownership for younger people	Lack of on-island skilled labourers / employees	Municipality Services – are there enough / too many / too expensive?	Speeding – concerns re: speed of driving across island, particularly in Cove	
Artisan Workshops / places to sell wares	Seniors – Aging in Place	Municipality Committees – too many?	Ferry Line – the zipper merge!	
Medical Facilities: Emergency and Urgent Care, Mental Health, Disabilities, Addictions, Alcoholism, Senior Care	Youth – gaps in youth opportunities to encourage them to stay on island	Islands Trust – do we want to be part of them? Expensive	Parking Issues esp. in the Cove	
Amenities and Infrastructure: water shortages, aging infrastructure, poor transit and connectivity	Tourists – too many? Worries about what it's doing to island culture and amenities	BC Ferries – overloads, not enough ferries	Reactionary Attitudes – people quick to judge, can sometimes be a bit of a "no" culture, e.g., "Everything Else" page	
Artisan Square – lack of visibility / accessibility for businesses	Young working population – people moving off-island because they can't afford it. Effect on businesses		Drinking and Driving / substance abuse issues – not enough support for these services	
Communal Gathering Place – Indoor, outdoor, alternatives to community centre, neighbourhood parks			Communication Styles of Municipal Documents, Programs and Outreach – doesn't "speak" to people	
Walkability - Village / Island / Connections Crown Lands Issue – threat of			Want more Civic Pride e.g., Cove Entrance Restrictive Zoning and LUBs	
logging			– new developments+	
New Firehall needed			Expensive – Cost of living, groceries Proximity of Vancouver: Is it making us a bedroom community? Do we want to be associated with them or independent?	

TABLE 3: LUBs Inhibitive to CED Activities and Initiatives

LUB Number	Key LUB Descriptor	Issue
PART 1 –	"INTENSIVE AGRICULTURE" means for the purpose of this bylaw any	Doesn't include commercial crops which is essential if we
DEFINITIONS	of the following uses: commercial manure based mushroom	are going to be able to grow our own food.
	cultivation; aquaculture; the keeping of livestock in a pasture, at	
	densities higher than its carrying capacity, and adjacent confinement	
	area.	
	"RECREATION, TRAINING AND MEETING CENTRE" means a use	Restrictive – why is this only for this group of people? IF we
	providing recreation, training and meeting facilities for the care and	are looking to grow this industry, this needs to be wider
	rehabilitation of persons with disabilities	usage
	"RETREAT CENTRE" means a use that provides for the operation of	Restrictive room number and usage and accommodations if
	spiritual, cultural or educational indoor or outdoor programs for	we are to grow this industry.
	single-day or in-residence guest use, and may include sleeping	
	accommodation for a maximum of 40 in-residence guests in a single	
	building or cabins; one shared kitchen and eating area; meeting	
	areas; bathrooms; accommodation for staff; one residence for the	
	manager or owner of the retreat centre; and accessory buildings.	
PART 3 – GENERAL	PROHIBITED USES OF LAND, BUILDINGS AND STRUCURES	Where do Tiny Homes fit in this picture? With the need for
REGULATIONS	The following uses are prohibited in all zones, except as otherwise	diverse housing and the uptick in tiny house culture, we
	specifically stated in this Bylaw:	need to take this into consideration as they don't have a
	A use located partially or totally in a tent trailer, motor home,	permanent foundation and would be used for more than
	camper, or other recreation vehicle, without a permanent	temporary sleeping accommodation / 90 days
	foundation or permanent service	
	is used for temporary sleeping accommodation for non-paying	
	visitors for a period not exceeding 90 days in any 360-day period.	

HOME	.3 A maximum of two (2) employees per dwelling, other than	Restrictive . Consider revising this number to 3. This makes a
	residents of the dwelling shall be permitted to engage in each home	max. of 4 people working at the home occupation, which is
	occupation on the lot where the home occupation is located.	reasonable.
	.4 No home occupation shall be permitted if the conduct of the	Why? This seems oddly restrictive
	home occupation entails or necessitates any alteration of the	
	exterior of the dwelling that would change the residential	
	appearance of the dwelling.	
	.5 No outside storage of material or equipment or both shall be	Change to more positive wording:
	permitted unless screened from view by a fence or landscape screen	No-Ooutside storage of material or equipment or both shall
	from adjacent lots or streets.	be permitted unless - <u>if</u> screened from view by a fence or
		landscape screen from adjacent lots or streets.
	.7 Bed and breakfast use is limited to four (4) guest bedrooms on	Restrictive . We have a short-term rental issue especially for
	lots less than 2 ha, and five (5) guest bedrooms on lots 2 ha and	our tourism offerings. We need to at least double this to be
	greater.	able to strategically grow tourism to keep Bowen thriving.
	.8 In a bed and breakfast a separate kitchen or cooking facilities for	Restrictive. Rudimentary kitchen facilities – microwave,
	use by guests of the bed and breakfast are not permitted.	toaster, toaster oven etc. should be permitted to encourage
		longer stays therefore boost Bowen's sustainable tourism
		offering. This should be clearly outlined.
COOKING FACILITIES	3.37 In a retreat centre cooking facilities are not permitted in	In a retreat centre cooking facilities are not permitted in
	bedrooms or cabins.	bedrooms or cabins. There is no reason for this.
PART 4 – ZONE	(4) Zone Variation – RR 1(d)	Neither of these are particularly conducive to affordable
REGULATIONS	(a) The minimum lot area for the creation of new lots through	housing development. We shouldn't just be looking at the
	subdivision shall be 16 ha with min service level of individual septic	Cove.
	tank and either spring, individual well or surface water licence.	
	(5) Zone Variation – RR 3(a)	
	(a) The maximum number of dwelling units shall be one dwelling	
	unit per 2 ha. of lot area.	

4.14.2 Size, Siting and Density of Permitted Uses, Buildings and Structures	Maximum floor area used for artisan industry that may be used for retail use 30%	This is low. 40% would be better
4.18 COMPREHENSIVE DEVELOPMENT 5 (CD 5) ZONE (ORCHARD RECOVERY CENTRE)	Maximum number of guest bedrooms – 9 Maximum number of in-residence guests - 18	This is low; especially given we know a) this industry is one of our growth industries and b) we need more support for people with addictions / drug issues. IF we are to grow as an island – economically and in terms of our health offerings, we should increase this. Recommend 25 – 30 rooms. (50 – 60 guests)
4.31.2 Size Siting and Density of Permitted Buildings and Structures	Maximum combined lot coverage of all buildings and structures 50%	Restrictive. Not conducive to affordable housing / positive community development.
	Maximum total floor area of Daycare Use (square metres) 500	This is very low given our % of families and children.
	Maximum floor area of Office, General Service, Medical Clinic, Retail and Restaurant Uses (square metres) 100 /500	This is very low given we know we need more medical facilities.
4.33.2 Size, Siting and Density of Permitted Uses, Buildings and Structures	Maximum number of guest bedrooms per 0.4 ha lot area – 12 Maximum number of guest bedrooms per lot – 12 Maximum number of in-residence guests per lot – 24 Maximum floor area for accessory retail sales (m2) – 20 Maximum number of meeting/course/workshop participants calculated as follows: 3 participants per each permitted guest bedroom - 36	Restrictive. Not conducive to encouraging shoulder season growth / conferences / workshops / retreats or growing our key growth industries. Need to revise this.
Discompling	7.3 VILLAGE REVITALIZATION DEVELOPMENT PERMIT AREA	All those guidelines fell under placemelting primairles
Placemaking Principles	7.5 VILLAGE REVITALIZATION DEVELOPIVIENT PERIVIT AREA	All these guidelines fall under placemaking principles. Consideration should be given to a placemaking section

	5) Hand painted, carved, or three-dimensional signs of the generic or symbolic kind shall be used. 8) The use of native vegetation and ground cover should be utilized in landscaping. 9) The use of native vegetation and built forms of screening is required around enclosures and parking areas. 11) The use of pedestrian amenities such as benches, arbours, rest areas; decorative lighting and surface treatment of pathways shall be incorporated. 7.4 VILLAGE PERIPHERY DEVELOPMENT PERMIT AREA 1) Landscaping proposals should generally incorporate native vegetation that produces a green landscape to the maximum extent possible and should include additional vegetation where appropriate in order to maintain a green rural backdrop to the village. 2) Design of buildings and landscaping should minimize the obstruction of views from existing properties; blend in well with existing natural features; give the impression of small-scale building forms; and connect with the proposed pathway system for the village. 4) Buildings should reflect the character of the nearby village commercial areas through appropriate choice of finishes, materials and natural colours.	within the LUB that sets out general placemaking principles for the whole of Bowen e.g., "Bowen Island Standards for Streets". They could be Cove specific and Island specific. This would allow us to define what kind of development, streetscaping, landscaping etc. principles we want people to adhere to for more economically viable and standardized development.
7.7 LIGHT INDUSTRIAL DEVELOPMENT PERMIT AREA	2. Where possible, significant trees shall be retained, and landscaping shall be provided along Mount Gardner Road, to enhance the appearance of buildings and provide an attractive transition to Crippen Park. All areas not used for buildings, parking, access and specified outdoor storage shall be landscaped or left in a natural state.	As it's likely this zone will be extended, this should be less descriptive in terms of place and just give overall guidance.

GENERAL	LUB – prescriptive sections	The LUB is very prescriptive to specific places and situations
OBSERVATIONS		which is great for them but not useful for others or future
		development. Consideration should be given to developing
		a more comprehensive and general set of use for overall
		use that can be applied to wider situations.

TABLE 4: OCP Objectives and Policies complementary to CED Activities and Initiatives

Objective / Policy #	OCP Descriptor	Key Theme: key notes
Objective 16	To house residents and visitors in smaller, energy efficient new and retrofitted homes constructed of local materials and powered, in large part, by local low carbon, clean, sustainable, and renewable energy sources.	Economic Sustainability, Community Resilience, Quality of Life: walkable village, cluster development, placemaking, affordable housing, local materials, eco-friendly, local jobs
Objective 17	To reduce the dependence on private vehicle travel.	Community Resilience: Sustainable Transport, Clean Energy Quality of Life: Reduced commuting
Objective 51	To discourage further commercial and residential strip or ribbon development.	Placemaking principles for better land use
Policy 95 Village Periphery	The objective of the Village Periphery area is to provide a compatible transition between the Village Core and the adjacent rural lands A variety of multiple residential unit types and secondary commercial development, including office and medical clinic uses, are also supported on this site.	Placemaking principles for better land use including mixed use and cluster developments
Objective 55	To encourage residential cluster development rather than large lot subdivision, with areas of green space between	Quality of Life: Placemaking principles for better land use and economic development
Objective 56	To maintain the rural character, environmental integrity, and social diversity of Bowen Island	Quality of Life: Protecting Bowen's culture
Policy 111	Outside Snug Cove Village, residential cluster development preferred to large lot subdivision	Quality of Life: Placemaking principles Community Resilience: affordable housing support

3.4.6 Cape Roger Curtis Lands	Develop public, waterfront, walking trails along most of the coastline, connecting to the crossisland greenway;	Quality of life: protecting our natural environment, healthy and active lifestyles Community Resilience: Active transportation – cross-island trail networks Economic Sustainability: eco-tourism opportunities
3.4.7 Snug Cove Residential	significant community endorsement for increased residential development in Snug Cove. The support for this increase relates to the desire for: alternative forms of housing; helping to enhance affordability; a pedestrian-friendly and accessible area close to shops, services, and the ferry; and the redirection of potential new development away from rural areas of the island	Quality of Life: Placemaking principles, protecting our natural environment, healthy and active lifestyles, cost of living Community Resilience: affordable housing support, Active transportation Economic Sustainability: supporting existing businesses and growth sectors
3.4.8 Arbutus Ridge Comprehensive Development Area	planned community, consisting of clusters of detached residential dwellings, interspersed by open space, trails and natural areas, and a Neighbourhood Park a small working farm, studios, and workshops a small café and retail outlet.	Quality of Life: Placemaking principles, protecting our natural environment, healthy and active lifestyles, cost of living Community Resilience: affordable housing support, Active transportation Economic Sustainability: planned community with businesses in key sectors including artisans and food / retail
3.5.1 Snug Cove Commercial Land Use	avoid the creation of new commercial areas outside the Village Commercial area.	Community Resilience: Community needs - As Bowen is growing and ¼ of our population is on the West Side, this may be short sighted. We may want to revise this. Why not have a shop / restaurant etc. at Tunstall, for example?
Tourist and Retreat Commercial Land Use Management Policy 185	Tourist commercial facilities are supported that enhance visitors' enjoyment of the island's natural amenities, without detracting from those amenities. Facilities that are designed to be destination attractions are not supported.	Economic Sustainability: Tourism - Needs revision. We need to think of our overall destination management and what we want to do here. Would this include destination retreat centres, for example?
Policy 190	Campgrounds serving the needs of backpackers and bicyclists may be permitted through commercial zoning regulation or temporary use permit on larger Rural designated properties	Economic Sustainability: Growth opportunity - Eco-tourism Possibility of developing campgrounds for hikers to increase eco-tourism. Look at park P4, for instance.

Policy 193	Owners of small inns, guesthouses, hostels, and Retreat Commercial uses are encouraged to provide guest transportation to and from the ferry terminal in order to minimize private vehicle use.	Community Resilience: Transport Quality of Life: Protecting our natural environment - Great opportunity to discourage extra vehicles on ferry and provide on-island employment for someone.
3.5.3 Commercial	Policy 198	Economic Sustainability: Supporting existing businesses – artisans etc. Could
Marina Land Use	The Municipality will examine potential use,	include markets, as has been suggested.
Management (Snug	including public space use, of the Municipal	
Cove)	Dock and Municipal Wharf Head to ensure that	
	pedestrian access remains a principal activity.	
Policy 200 and 201	Cottage industry that allows for limited	Economic Sustainability: Supporting existing businesses – artisans etc.
	industrial activity in association with a	Encouragement of artisanal industry as requested in consultation. Light
	residential use is acceptable on property zoned	industry supported as requested
	for such use to accommodate resident	
	craftspeople. The teaching of skills and	
	apprenticeship and the use of local island	
	resources are encouraged as part of the cottage	
	industry.	
	Current and future owners or operators of	
	industrial land uses are encouraged to work	
	with the Municipality to find a suitable location	
	where industrial uses serving local needs can be	
	located together, instead of scattered across the	
	island, giving consideration to the criteria	
	established elsewhere in this OCP.	
Objective 85	To provide for the supporting infrastructure	Community Resilience: Food growing
	necessary to maintain and strengthen the	
	agricultural economy.	
Policy 214	Agriculture will be supported on Bowen Island	Economic Sustainability: Supporting existing businesses, growth opportunities
	by:	Community Resilience: Food growing
	public market, farmers' outlets, roadside stands	

	support local food production; farm vacation and retreat centres locally produced agricultural products	
Policy 226 and 228	The use of small portable sawmills and the development of a remanufacturing plant to use local wood resources as a light industrial use is encouraged. To minimize the fragmentation of forests,	Community Resilience: Reusing resources in a sustainable way Quality of life: protecting our natural environment
Policy 230	All public and institutional facilities will be accessible for people with mobility challenges.	Quality of life: supporting marginalized groups, aging in place
Policy 231	A future community centre and a facility for the performing arts should be located within Snug Cove.	Economic sustainability: providing opportunities. for existing and emerging businesses in the arts Quality of life: providing accessible facilities for all
Policy 234	Existing cabins in Crippen Regional Park have a heritage value derived from the Union Steamship eraarts and crafts studio use may include residential use for the artisan and retail sales of the arts and crafts that are produced; accommodation of a caretaker, a parks groundskeeper and a limited number of cabins may be used for short-term tourist accommodation and related ancillary facilities;	Economic sustainability: providing opportunities. for existing and emerging businesses in the arts, strategic tourism, retail Quality of life: job opportunities
Objective 110	To promote multi-modal forms of transportation across the island linking neighbourhoods with each other, to local parks and beaches, and to Snug Cove Policy 249link all parts of the Snug Cove Village together into a walkable village and link the Village to the Park.	Quality of life: protecting our natural environment, active lifestyles Community Resilience: Active transport, green transport links

	Policy 259	
	Snug Cove Village form and character will cater	
	to the pedestrian.	
Objective 137	To develop and maintain public access in	Economic sustainability – sustainable tourism / growth opportunities.
	selected natural areas, parks, shorelines,	
	beaches, trails, and viewpoints for recreational	
	and educational purposes that support	
	community health and wellness, as well as low	
	impact eco-tourism opportunities.	
Policy 332	Non-consumptive marine recreation activities,	Economic sustainability – supporting existing businesses and growth
	such as sea kayaking and sightseeing, are	opportunities.
	encouraged.	
Policy 336	The municipality supports the construction of	Economic sustainability – supporting existing businesses and growth
	multipurpose playing fields to be located on	opportunities.
	both the east and west sides of the Island.	Quality of Life: active lifestyles
Objective 144	To work towards an extensive, interconnected	Economic sustainability – supporting existing businesses and growth
	network of protected natural lands for	opportunities.
	environmental conservation and protection,	Quality of Life: active lifestyles, protecting our natural environment
	recreation and eco-tourism, community health	
	and wellness purposes.	
Policy 346	The Municipality will work towards the	Economic sustainability – supporting existing businesses and growth
	development of non-motorized trails in selected	opportunities.
	Greenway areas, which support local recreation,	Community Resilience: alternative transport opportunities.
	alternative transportation options, and eco-	Quality of Life: active lifestyles
	tourism development opportunities.	
Objective 148 and 149	To remain a diverse community that is a	Community Resilience: affordable, diverse housing
	welcoming home to residents of varying	Quality of life: diversity
	incomes, lifestyles, and ages.	

	To provide for a range of housing types and	
	tenures on Bowen Island within the overall	
	context of the spirit and intent of this OCP.	
Policy 356	Within the Belterra Lands and the Seymour Bay	Quality of life: diversity and placemaking principles
	area of the Cowan Point Comprehensive	
	Development Area, consideration may be given	
	to townhouse, multi-unit housing, including	
	affordable housing, which meets the needs of	
	island residents.	
Policy 363	The Municipality will consider reducing parking	Community resilience: transport / parking, affordable housing
	requirements in any affordable housing project	
	and encourages initiatives for car-sharing.	
Policy 370	Consistent with the recommendations of the	Quality of life: aging in place, diverse needs for marginalized groups
	Age Friendly Community Project	
Policy 381	The Municipality will maintain the baseball field	Economic Sustainability: existing businesses and growth opportunities.
	in its current location, reinforcing its function as	
	a significant community amenity and economic	
	generator for businesses in Snug Cove Village.	
Policy 388 social well-	•outdoor spaces and public buildings that are	Community Resilience: transport, affordable housing
being	pleasant, clean, secure, and physically	Quality of life: accessible services for all, employment opportunities, aging in
	accessible;	place
	 public transportation that is accessible and 	
	affordable;	
	 housing that is affordable, appropriately 	
	located, well built, well designed and secure;	
	•opportunities for social participation in leisure,	
	social, cultural, and spiritual activities with	
	people of all ages and cultures;	
	 opportunities for employment and 	
	volunteerism that cater to older person's	
	interests and abilities;	

Policy 390	The Municipality will establish an "Elders Advisory Council" and assign a Councillor to the "seniors' portfolio", as recommended in the Age Friendly Community Project.	Quality of life: aging in place
Policy 398	Existing farms and orchards should be protected, and new farms encouraged, especially to propagate a variety of heritage fruit trees, to enhance rural and historic aspects of the island.	Economic sustainability: existing business needs / growth opportunities. Community Resilience: Growing food Quality of life: protecting our natural environment
Objective 168	To encourage and support the growth of arts and cultural activities, as outlined in the Cultural Master Plan.	Economic Sustainability: Supporting existing businesses – arts and culture
SECTION 10 TOWARDS A SUSTAINABLE FUTURE: ISLAND ECONOMY		
	Objective 169 work toward an island economy that is relatively diverse and increasingly sustainable and innovative, meeting many of the primary needs of residents and visitors.	Economic sustainability: existing businesses, sustainable tourism Quality of life: residents' needs, diversity
	Objective 170 ratio between on-island jobs and population gradually increases.	Quality of life: on-island employment opportunities
	Objective 171 local employment in island-based sustainable activities.	Quality of life: on-island employment opportunities
	Objective 172 high quality of life can be used to enhance economic viability.	Economic sustainability: leveraging our position to grow our economy

	Objective 173 serve the needs of island residents and visitors while maintaining a scale, form and character of economic development that is in keeping with the objectives of the OCP	Quality of life: protecting our island culture
	Objective 174 •promote economic activity that builds on diversity, sustainability, innovation, and creativity; •explore the formation of a Business Improvement Association 49 for Snug Cove; and •promote "green" business leadership and sustainable business practices.	Economic sustainability: existing businesses, sustainable tourism, growth opportunities. Community resilience: green businesses
	Policy 409 The Municipality will work with the Chamber of Commerce and other interested parties to complete an Economic Development Plan that will examine short- and long-term issues, needs and opportunities to enhance existing and new businesses and associated employment that is complementary to the objectives of this OCP.	Economic sustainability: existing businesses, sustainable tourism, growth opportunities. Community resilience: overall needs for sustainable community Quality of life: employment opportunities. cost of living, overall quality of life improvements
Objective 176	To support cultural tourism, aiming for value- added products that maximize return with minimal impacts.	Economic sustainability: strategic tourism – cultural tourism, growth opportunities. Quality of life: protecting and understanding our natural environment
Policy 411	The Municipality supports the initiatives of Bowen Island artists and craftspeople to export their work. The policies of this OCP encourage home-based business and artisan industry, primarily at Artisan Square.	Economic sustainability: supporting existing business needs / growth opportunities.

Objective 177	To encourage home-based businesses as a	Economic sustainability: supporting existing business needs / growth
	means of maintaining the island character and	opportunities.
	to help promote self-sufficiency and a sense of	Community Resilience: Self-sufficiency
	community.	Quality of life: protecting our island culture
Policy 418	High speed portals, internet, and digital media	Community resilience: Technology
	connections to all areas of the island are	
	encouraged.	
10.5 Tourist Services		
and Accommodations		
Objective 180	To recognize tourism as an integral part of the	Economic sustainability: strategic tourism, growth opportunities.
	island economy, with a focus on sustainable	Community Resilience: sustainability
	practices.	
Objective 181	To support opportunities to nurture the further	Economic sustainability: strategic tourism, low-impact tourism
	development of low-impact tourism	
Objective 182	To continue to position the island as a	Economic sustainability: strategic tourism, growth opportunities. – eco
	destination for eco-tourism, education tourism,	tourism, health and wellness etc.
	retreats, and health and wellness centres	
Objective 183	To provide accommodation for visitors so they	Community resilience: accommodation
	may enjoy the island's unique amenities and	
	environment.	
Objective 184	To support the exploration of a National Park	Quality of life: protecting our natural environment
	Reserve on Bowen Island.	
Objective 185 and 186	To recognize health and wellness institutions	Economic sustainability: growth opportunities.
	and retreats as a desirable business sector and	Quality of life: health and wellness
	to support the growth of this sector.	
	To recognize small business retreats, meetings,	
	and conferences as a desirable business sector	
	and to support growth of this sector.	

Objective 187 and 188,	To position the Island as an ideal location for	Economic sustainability: growth opportunities.
Policy 422, 423 and 424	health and wellness institutions and for small	Quality of life: health and wellness
	business meetings and conferences.	
	To provide accommodation for visitors so that	
	they may participate in these health and	
	wellness and small business conferences.	
	New businesses are supported that provide	
	health and wellness and retreat services.	
	New businesses are supported that provide	
	opportunities for small business meetings and	
	conferences.	
	Accommodation for institutions and retreats	
	shall include bed and breakfast establishments,	
	guesthouses, small inns, lodges, and commercial	
	cottages.	
Policy 425	Owners of the accommodations identified in	Economic Sustainability: business growth opportunities.
	Policy 424 are encouraged to provide guest	Community Resilience: Active / Alternative transport
	transportation to and from the ferry terminal in	Quality of life: employment opportunities.
	order to minimize vehicle use.	
Initiatives from Section	•investigate the benefits of an on-island	Economic sustainability: existing business opportunities, growth opportunities
2 – Natural	composting facility and household organic	Community resilience: self-sufficiency, green energy, active / alternative
Environment	waste pick-up program	transport
	•proactively work with development and	Quality of life: aging in place, diversity, marginalized groups support,
	building industry representatives to build	protecting our natural environment
	knowledge, capacity, and experience in energy	
	efficient and green building practices	

	•develop, coordinate and promote island	
	pedestrian, cycling and transit systems as	
	alternatives to vehicle trips investigate the	
	feasibility of low-speed electric vehicles as an	
	alternative to fuel powered vehicles for on-	
	island travel, as well as the viability of installing	
	electric vehicle plugs in Snug Cove	
	•designate and construct ride-share shelters at	
	strategic locations, particularly where public	
	transit is not available;	
	•investigate viable alternative options for	
	seniors who are unable to drive;	
	•explore the potential of acquiring authority to	
	manage marine uses adjacent to Sandy Beach,	
	Bowen Bay Beach and Tunstall Bay Beach	
	through foreshore tenure;	
	•identify and develop a public boat launch at	
	Tunstall Bay while ensuring no net habitat loss;	
Initiatives from Section	trails to connect the surrounding areas of	Community resilience: alternative transport methods – trail network,
4 – Transportation and	Crippen Regional Park with each other, to link all	walkability
Mobility	parts of the Snug Cove Village together into a	Quality of life: protecting our natural environment, active lifestyles, health and
	walkable village and link the village to the Park	wellbeing, marginalized groups
	(Policy 137); and	
	provide a shared-use trail network for	
	pedestrians, bicycles and equestrians that	
	connects neighbourhoods and facilitates access	
	to parks and public facilities	

TABLE 5: Strategies and Plans key activities and objectives (grouped by theme)

CED Theme	Activity / Objectives	Plan / Strategy
Economic Sustainability:		
Tourism: Strategic Plan	Implement Tourism Plan and Monitor Activity, reciprocal positions	EDC Action Plan
	on various boards, branding and welcoming exercise to establish	Tourism Plan 2013
	Bowen's brand and welcome visitors, establish tourism champion,	Parks Plan 2018 – 2028
	destination management, MRDT, managing visitation, low-impact	Transportation Plan 2018-2038
	tourism, regional connections to grow tourism strategically	Island Plan 2019
Tourism: Awareness and Value	awareness and value of tourism, changing residents' attitudes,	Tourism Plan 2013
	value of tourism model, training and development (including	Cultural Masterplan 2017 -2027
	related retail establishments)	Parks Plan 2018 – 2028
		Island Plan 2019
Existing Business Needs: Business Awareness	Business walks, BRE program, business website enhancements,	EDC Action Plan
and Support	community profile, improvements at function junction (in cove),	Tourism Plan 2013
	wayfinding and signage, Artisans market, artisans retreat,	Cultural Masterplan 2017 -2027
	supporting retail, arts and culture	Parks Plan 2018 – 2028
		Island Plan 2019
Existing Business Needs: growth	Webinars and information to help businesses thrive, training and	EDC Action Plan
opportunities	development, growing key growth industries – eco-tourism, health	Tourism Plan 2013
	and wellness, arts and culture	Cultural Masterplan 2017 -2027
		Parks Plan 2018 – 2028
		Island Plan 2019

Community Resilience:		
Communication and Information: BIM	Electronic newsletter, public information sessions, communication	EDC Action Plan
	plan and tools, CED website, business info. resource library, regular	Cultural Masterplan 2017 -2027
	contact with relevant Ministry reps.	Parks Plan 2018 – 2028
		Transportation Plan 2018-2038
		Island Plan 2019
Infrastructure and Amenities: Parking	More parking in key areas – Cove, public amenities, commuter	Cultural Masterplan 2017 -2027
	parking	Parks Plan 2018 – 2028
		Transportation Plan 2018-2038
		Island Plan 2019
Infrastructure and Amenities: Public	More public washrooms needed at publicly accessed areas	Tourism 2013
Washrooms		Parks Plan 2018 – 2028
		Island Plan 2019
Infrastructure and Amenities: Transport	Better transport options needed. Sustainable transport needed	Tourism 2013
	e.g., shuttle buses, green infrastructure, electric vehicles	Cultural Masterplan 2017 -2027
		Parks Plan 2018 – 2028
		Transportation Plan 2018-2038
		Island Plan 2019
Infrastructure and Amenities: Housing	Diverse, affordable housing for all incomes and lifestyles.	Island Plan 2019
Volunteerism	Giving back, growing our network sustainably, organising,	Cultural Masterplan 2017 -2027
	supporting and leveraging our volunteers	Parks Plan 2018 – 2028
		Island Plan 2019
Self-sufficiency	Important for us to become more self-sufficient as we are an island	Cultural Masterplan 2017 -2027
	e.g., able to grow our own food (community gardens), alternative	Island Plan 2019
	energy sources (windmills), water storage, emergency response	
	(new firehall) etc.	

Quality of Life:		
Employment and income: Employment	Help people get better paid jobs / make a better living.	Cultural Masterplan 2017 -2027
opportunities. / gaps	Opportunities. for selling art etc. to make artists money	Parks Plan 2018 – 2028 Island Plan 2019
Placemaking strategies for better lives:	Develop placemaking competencies and working with private	Cultural Masterplan 2017-2027
policies and regulations	landowners to leverage land e.g., connection s to parks and trails	Parks Plan 2018 – 2028
		Transportation Plan 2018-2038 Island Plan 2019
Placemaking: Civic Pride and community	Cove: Beautification and streetscaping, Making the entrance more	Tourism Plan 2013
gathering spaces	welcoming, overall improvement plan for the Cove. Civic centre	Cultural Masterplan 2017-2027
	facility / community hall	Parks Plan 2018 – 2028
		Transportation Plan 2018-2038
		Island Plan 2019
Community Health and Wellbeing: Seniors	Services and opportunities to support these groups. Esp. active	Parks Plan 2018 – 2028
and marginalized groups	lifestyles activities	Transportation Plan 2018-2038
		Island Plan 2019
Demographic opportunities: Aging in place	More amenities to aid aging in place – healthcare, places to go,	Parks Plan 2018 – 2028
	transport etc.	Transportation Plan 2018-2038
		Island Plan 2019
Demographic opportunities: Opportunities	More amenities to make Bowen better for our youth: volunteering	Cultural Masterplan 2017 -2027
for youth	opportunities., activities, places to go etc.	Parks Plan 2018 – 2028
		Transportation Plan 2018-2038
		Island Plan 2019
Quality of Life: protecting our natural	Key factor in development. Protect what we have. Water	Tourism Plan 2013
environment	conservation. Lower our footprint. Carbon Offsets. Multi-use paths	Parks Plan 2018 – 2028
	using our natural assets for connectivity but while protecting our	Transportation Plan 2018-2038
	environment	Island Plan 2019

Community Health and Wellbeing: Overall	Importance of active lifestyles for health and wellbeing through	Parks Plan 2018 – 2028
	walking, cycling, active recreation etc. and supporting activities and	Transportation Plan 2018-2038
	objectives which will achieve this	Island Plan 2019
Quality of Life: Diversity	Make Bowen a safe, welcoming, and inclusive place for everyone.	Cultural Masterplan 2017 -2027
	Celebrate FN culture, open respectful dialogue, include in	Parks Plan 2018 – 2028
	economic decisions	Island Plan 2019
Quality of Life: protecting our unique	Protecting the things that make Bowen "Bowen": community,	Cultural Masterplan 2017 -2027
community culture	connection, unique culture: artists and artisans, local events,	Parks Plan 2018 – 2028
	spaces etc. that support our "Bowenness"	Transportation Plan 2018-2038
		Island Plan 2019
Quality of Life: cost of living	Cost of living very high, difficult for those on low incomes and to	Cultural Masterplan 2017 -2027
	run a business / be artists and artisans etc. – need more support.	Parks Plan 2018 – 2028
	Accessibility of services for all to ensure everyone can afford	Transportation Plan 2018-2038
	Bowen's various offerings including basic services e.g., transport,	Island Plan 2019
	recreation	

TABLE 6: Past Consultation key issues raised (grouped by theme)

CED Theme	Issue Raised	Consultation Exercise
Economic Sustainability:		
Strategic Tourism: Managing Tourism	Shoulder Season, too many tourists,	Business Breakfast Retail 2018
	need a strategic way of managing	Business Breakfast Food 2018
	tourism	Community Lands Workshop 2018
		Bowen Island Survey 2019
		Business Summit 2019
Existing Business Needs: Business Awareness and Support	Signage, Hours communication, "Buy	Conversations with B Businesses 2015
	Local" campaigns to encourage local	Business Breakfast Retail 2018
	buying, support for businesses at artisan	Business Breakfast Food 2018
	square	Bowen Island Survey 2019
		Business Summit 2019
Existing Business Needs: Independent Business Associations	Creating various business associations	Business Breakfast Trades 2018
	for info. sharing, liaison, advocacy and	Business Breakfast Food 2018
	resources	Bowen Island Survey 2019
Growth opportunities	Have great businesses, but need more	BI Visitors Survey 2015
	diversity esp. to support self-sufficiency	Community Lands Workshop 2018
	– commercial kitchen, equipment	Bowen Island Survey 2019
	rentals, food growing, microbreweries	Business Summit 2019
	etc. Not just restaurants and art galleries	Business Breakfast Health 2020
	– and our growth industries e.g., spa	
	services	

Community Resilience:		
Infrastructure and Amenities: Parking	Not enough in the Cove, causing issues	Business Breakfast Retail 2018
		Bowen Island Survey 2019
		Business Summit 2019
		Business Breakfast Health 2020
Infrastructure and Amenities: Public Washrooms	Not enough, frustration from businesses	Business Breakfast Food 2018
	at tourists using theirs	Bowen Island Survey 2019
Communication: BIM	More consultation on initiatives, more	Business Breakfast Food 2018
	information, respectful and consensus	Vital Conversations 2014
	building rather than "telling" – residents	Community Lands Workshop 2018
	don't feel heard / as though we're	Bowen Island Survey 2019
	listening	Business Summit 2019
Infrastructure and Amenities: Transport	Better transport options needed esp. for	Vital Conversations 2014
	seniors and mobility impaired.	Vital Conversations 2017
	Sustainable transport needed – no buses	Community Lands Workshop 2018
	at night, seniors struggling, reliance on	Bowen Island Survey 2019
	car. Need alternatives now – bikes,	Business Summit 2019
	shuttle buses, electric cars shuttle ferries	Business Breakfast Health 2020
	etc. Walkability. Car-free options.	
	Reduction in commuting and traffic.	
	Addressing ferry issues	
Infrastructure and Amenities: Housing	Diverse, affordable housing for all	Vital Conversations 2014
	incomes and lifestyles. Need to consider	Conversations with B Businesses 2015
	who to partner with to achieve this.	BI Residents Survey 2015
	BIRCH is a good start but who else?	Vital Conversations 2017
		Community Lands Workshop 2018
		BI Survey and Business Summit 2019
		Business Breakfast Health 2020

Volunteerism	Giving back, growing our network	Vital Conversations 2014
	sustainably, organising our volunteers	Vital Conversations 2017
		Conversations with B Businesses 2015
		Bowen Island Survey 2019
Technology	Robust systems, solid internet and IT,	Conversations with B Businesses 2015
	what will we do in a communications	Community Lands Workshop 2018
	breakdown / crisis?	Bowen Island Survey 2019
		Business Summit 2019
Self-sufficiency	Important for us to become more self-	Vital Conversations 2014
	sufficient as we are an island e.g., able to	BI Residents Survey 2015
	grow our own food (community gardens)	Community Lands Workshop 2018
	looking at alternative energy sources	Bowen Island Survey 2019
	(windmills), water storage and reuse of	Business Summit 2019
	water etc.	

Quality of Life:		
Employment and income: Employment opportunities. / gaps	Opportunities to become accredited in	Conversations with B Businesses 2015
	needed fields to fill gaps and hire on-	Business Breakfast Food 2018
	island, need to help people get better	Business Breakfast Trades 2018
	paid jobs. Staff availability a problem.	Bowen Island Survey 2019
	Having to provide housing to keep staff.	Business Summit 2019
	Expensive	
Placemaking strategies for better lives: policies and regulations	Better zoning for industrial land-use	Business Breakfast Trades 2018
	needs e.g., heavy equipment storage.	Community Lands Workshop 2018
	Current policies and regulations	Bowen Island Survey 2019
	preventing progression / development,	Business Summit 2019
	LUB regulations too strict	
Placemaking: Civic Pride and community gathering spaces	Cove: Making the entrance more	Vital Conversations 2014
	welcoming, overall improvement plan for	Conversations with B Businesses 2015
	the Cove including streetscaping.	Vital Conversations 2017
	Neighbourhoods: creating gathering	Community Lands Workshop 2018
	spaces, events, parks, welcoming	Bowen Island Survey 2019
	community "feel", strengthening	
	connections and community	
Community Health and Wellbeing: Seniors and marginalized groups	Offering services e.g., places to go in the	Vital Conversations 2014
	day, support, healthcare etc. to help	Conversations with B Businesses 2015
	these groups	Vital Conversations 2017
		Business Breakfast Health 2020
Demographic opportunities: Aging in place	More amenities to aid aging in place –	Vital Conversations 2014
	healthcare, places to go, transport etc.	Vital Conversations 2017
		Bowen Island Survey 2019
		Community Lands Workshop 2018
		Business Breakfast Health 2020
Demographic opportunities: Opportunities for youth	Bowen is great for very young kids, not	Vital Conversations 2014
	so much for teenagers. We need more	Vital Conversations 2017

	amenities to make Bowen better for our youth: volunteering opportunities.,	Bowen Island Survey 2019 Community Lands Workshop 2018
	activities, places to go etc.	
Quality of Life: protecting our natural environment	Key factor in development. Protect what	Vital Conversations 2014
	we have. Don't over-develop. Crown	BI Visitors Survey 2015
	Lands issue. Water conservation. Lower	Conversations with B Businesses 2015
	our footprint.	BI Residents Survey 2015
		Vital Conversations 2017
		Community Lands Workshop 2018
		Bowen Island Survey 2019
		Business Breakfast Health 2020
Community Health and Wellbeing: Overall	Need for better healthcare but also	Vital Conversations 2014
	recognizing importance of nontraditional	BI Visitors Survey 2015
	healthcare, "forest bathing" yoga etc.	BI Residents Survey 2015
	and supporting these. Support for	Vital Conversations 2017
	addictions, mental health etc.	Community Lands Workshop 2018
		Business Breakfast Health 2020
Quality of Life: Diversity	Make Bowen a safe, welcoming, and	Vital Conversations 2014
	inclusive place for everyone	Conversations with B Businesses 2015
		Vital Conversations 2017
		Bowen Island Survey 2019
		Business Breakfast Health 2020
Quality of Life: protecting our unique community culture	Protecting the things that make Bowen	Vital Conversations 2014
	"Bowen": community, connection,	BI Visitors Survey 2015
	closeness, looking out for each other,	Conversations with B Businesses 2015
	safety, unique culture: artists and	BI Residents Survey 2015
	artisans working at the pharmacy,	Vital Conversations 2017
	Bowfest we should make more of it.	Bowen Island Survey 2019
	Support and encourage local events,	Business Summit 2019
	spaces etc. that support our	Business Breakfast Health 2020

	"Bowenness" as this is what people	
	enjoy about us	
Quality of Life: cost of living	Cost of living very high, difficult for those	Vital Conversations 2014
	on low incomes and to run a business –	Conversations with B Businesses 2015
	need more support. We don't want to	Bowen Island Survey 2019
	become a bedroom community or just a	Business Summit 2019
	home to the wealthy elite. We need to	
	support the people that deliver our	
	services.	

Appendices - Key Comparator Communities Gabriola

CED Snapshot in a sentence

Aging, decreasing population with a CED focus on branding, tourism marketing and population attraction.

Community "Makeup"

Based on their 2017 CED Plan, key conclusions from Gabriola's economic analysis include:

- 2016 population decreased by .03% since 2011 (4045 to 4033)
- Aging population and loss in what looks like families.
- More people living on the island full-time rather than summer homes: 49 less homes in 2016 than 2011. 19 houses built over the past 5 years that are private dwellings.
- They have a 48.5% unemployment rate
- Top 3 occupations: Retail trade, Professional, scientific, and technical services, Construction

Gabriola's top 5 CED principles

Gabriola's CED mission is "to develop a robust Island economy that thrives within the culture Gabriolans cherish. We will provide tools and resources to create a community working in concert to improve our entrepreneurial capacity."

Their top CED objectives to achieve this are:

- Strategic tourism and branding: Create a brand to strategically market culture and climate of Gabriola.
- **Develop strategic economic initiatives that speak to their community:** e.g., asset inventory, population growth, funding, small business growth for artisans and youth
- **CED Plan delivery:** Develop a formal model for the delivery of their Economic Development Plan governed in partnership with their Chamber of Commerce.

CED Structure

Gabriola is part of the Islands Trust and falls under the Regional District of Nanaimo. Their Community Economic Development Officer works 30 hours per week as part of the Chamber of Commerce and has a support assistant. Their CED initiatives are funded jointly by the Rural Dividend, the Regional District and Destination BC and tie in directly with their community's overall strategic missions and values.

Process undertaken to develop CED Plan

Gabriola undertook the following process to develop their CED Plan:

Phase I – Stakeholder Buy-in and Feedback to Future Direction

Two, half-day sessions with operators to share the current status of tourism and economic development on Gabriola, refresh operators on the findings of the Gabriola Economic Readiness Report, summarize the recommendations/activities implemented to date and solicit feedback as to report findings, current relevance, future opportunities and priorities.

Phase II – Strategic Planning developed from Phase I

1-day session based on feedback from the strategic partners. Reporting on feedback, recommendations and priorities that were captured in the two, $\frac{1}{2}$ day Stakeholder sessions CED mission, pillars, actions etc. were defined.

Phase III

Strategic plan drafted and presented to partners for feedback. Revised as necessary then adopted.

Key Learning Points

- Consultation process was short and with focused groups.
- Plan development feedback process was likewise short and focused.
- Gabriola did not already have a community brand, so they were "starting from scratch". Bowen has already developed this which is to our advantage.
- Focus on tourism and branding.
- CED Plan and initiatives tie in with overall strategic missions and values.
- Full-time CED officer with additional support where necessary to aid consultation and development processes.

Appendices - Key Comparator Communities

Ucluelet

CED Snapshot in a sentence

Youthful population with high employment and a CED focus on growing existing industries of tourism and marine activity, plus potential growth opportunities, to retain population.

Community "Makeup"

Based on their 2014 CED Plan, key conclusions Ucluelet's economic analysis on includes:

- Steady population growth over last 30 years.
- Youthful adult population, significantly more residents in prime working-age 25-54 yrs.
- Median employment incomes are lower than BC average, largely due to seasonality.
- Top 3 occupations: Accommodation and food, Retail trade, Agriculture, forestry, fishing and hunting
- High number of college graduates. Strong cluster of arts and communications graduates.
- An estimated 60% of everyday spending by residents is in Ucluelet. Residents desire more affordable food and clothing and a greater variety of goods and services.
- Tourism is viewed as the most important future industry.

Ucluelet's top CED principles

Ucluelet do not have a CED Plan vision. However, their overall community vision is: "Ucluelet's built and natural environment respects, above all, the outstanding diverse natural habitat and optimizes recreational opportunities for its citizens and its visitors. Ucluelet residents enjoy a high quality of life built upon a sustainable and diversified local economy."

Their top CED Plan objectives are:

- Realign economic development structure and tools. The framework for implementing CED.
- Invest in Ucluelet's human potential. Supporting Ucluelet's population to live and work.
- Enhance physical infrastructure for economic development. Providing the infrastructure for CED initiatives e.g., employment, land use, transport, and telecommunications.
- Capitalize on harbor related opportunities. Harbour-related strategies to support one of Ucluelet's main sources of industry.
- Pursue targeted economic development opportunities. Existing and potential opportunities.

CED Structure

Ucluelet is a district municipality and falls under the Regional District of Alberni-Clayoquot. Their Economic Development Officer works under the Chamber of Commerce (a project manager and program continuity coordinator) for their Ucluelet Business and Employment Retention and Expansion Program, dubbed UBERE, in response to the CED Plan. These initiatives are funded by the District of Ucluelet and the Island Coastal Economic Trust and tie in to Ucluelet's strategic missions and values, backed by their Council.

Process undertaken to develop CED Plan

Ucluelet hired an external consultant to prepare their plan. The main three objectives were:

Community economic analysis, Community survey, Economic development strategy (with additional funding for harbor related issues)

The main activities undertaken to achieve this were:

- Survey: 2 interviewers, in-person interviews. Plus, analysis for the community economic analysis
- Workshop with District Council and Staff presenting results of the economic analysis and survey, discussing issues to be addressed in the strategy.
- Additional meetings with key community members also conducted.
- 2 additional public workshops with the public and a 2nd workshop with Council
- Draft version of the strategy was presented and discussed with Council at the Annual General Meeting of the UEDC in July 2011.
- Report completed and final draft presented and received at Council.

Key Learning Points

- Like Gabriola, Ucluelet's consultation process was short and with focused groups.
- Plan development feedback process was likewise short and focused.
- Ucluelet used consultants to carry out the consultation and plan process.
- Focus on people and businesses.
- CED Plan ties in to Ucluelet's overall strategic missions and values and is backed by their Council.

Appendices - Key Comparator Communities

West Vancouver

CED Snapshot in a sentence

Aging, bedroom community with affordable housing issues, with a CED focus on strategic tourism and growth opportunities to attract employment and business growth.

Community "Makeup"

Based on their 2018 CED Plan, key conclusions West Vancouver's economic analysis includes:

- Aging population with decline in working age population.
- Large portion of workers do not live in West Vancouver they commute
- Housing shifting away from single family homes to smaller, apartment style
- Lack of affordable housing 37% had family or friends move due to lack of affordable housing options
- 44.2% unemployment rate
- Top 3 occupations: Professional, scientific, and technical services, Health care and social assistance, Retail trade
- High proportion of residents working in arts, entertainment, and recreation industries
- Lack of entertainment opportunities seen as a barrier to growth opportunities

West Vancouver's top CED principles

West Vancouver's vision is "West Vancouver will inspire excellence and lead by example. Collaborative government and a spirit of personal civic commitment will power the innovations that shape our shared future. The strength of this relationship will secure our treasured quality of life and will be the measure of our success as a community."

Their top CED objectives to achieve this are:

- Value of tourism and visitor attraction strategy: Support existing West Vancouver businesses by attracting visitor spending at a time when the local population and local market are declining, value of tourism and visitor offerings
- **Commercial Hubs:** Create opportunities for new business start-ups and grow local employment opportunities, Identifying Commercial Areas: Hierarchy, Role, and Function
- Local Attraction and Retention Strategy: Broaden the municipal tax base, Regional Economic Growth, Innovation and Entrepreneurial Ecosystems

CED Structure

West Vancouver is a District Municipality. Their CEDO works full time and has various paid and voluntary support. Their CED initiatives are funded by the District of West Vancouver and Destination BC and they will be seeking funding through the MRDT and other government opportunities.

Process undertaken to develop CED Plan

West Vancouver engaged the following groups to develop their plan:

- Local business community to help identify commercial hubs e.g., Horseshoe Bay Business Association (HBBA), Caulfield Business Association
- Destination Marketing Organizations to help with visitor attraction strategy e.g., Destination BC, Vancouver's North Shore Tourism Association (VNSTA), Tourism Vancouver
- Industry Partners in film, technology, real estate etc. to help identify business growth opportunities

There isn't any information on how they conducted this process but conversations with their CED officer reveals it was done through a series of meetings and workshops to help identify key objectives and actions that were then used to develop the plan.

Key Learning Points

- Consultation process was with focused groups. Their identification of these key groups was instrumental in their consultation process and subsequent CED initiatives.
- Plan development feedback process was likewise short and focused.
- Focus on people, businesses, and tourism.
- CED Plan ties into West Vancouver's overall strategic missions, other departmental activities and is backed by their Council
- Full-time CED Officer with additional support to aid consultation, development, and implementation.

Appendices - CED Interviews

Paul Vallee (Tourism Bowen Island)

- 1: What, in your opinion, is TBI's role? How can BIM build a better relationship with them / you?
- 2: What are your current goals? What is the status of your strategic tourism plan?
- 3: In your opinion, what are Bowen's CED sticking points and how should they be addressed?
- 4: Who are the key groups / industries / economic drivers for Bowen now and moving forward?
- 5: How do you envision Bowen's sustainable future? What would you like to see?
- 1 Destination stewardship. Manage experience not just by getting more people but the right people. Sustainable development of the island for everyone. People feel welcome, they look after the island etc.
- 2 Community alignment. How do you align the different groups, so everyone works towards a similar goal? Get residents, businesses, groups to work together to common goal.
- 3 Digital conversion: connecting with visitors on mobile devices to drive real-time sales in destination e.g., like Trip Advisor, reviews, maps, GPS, connectivity. It's all connected.

MRDT for sustainable funding of initiatives. Needs to be sold as an opportunity.

We need a destination plan showing TBI as a solution not a problem.

- 4: TBI, businesses, residents everyone needs to be on board and working together.
- 5: More success stories for tourism and a sustainable tourism plan. More retreats and corporate retreats to enhance Bowen's potential in shoulder season esp. Winter. Would also allow some of our "experts" to stay on-island in employment. Sees a "Centre of Excellence" for Bowen's future.

Gordon Ganong (Past Chair - Community Economic Development)

- 1: In your experience, what did you find the most successful way of engaging Bowen's residents and businesses?
- 2: In your opinion, what are Bowen's CED sticking points and how should they be addressed?
- 3: Who are the key groups / industries / economic drivers for Bowen now and moving forward?
- **4:** How do you envision Bowen's sustainable future? What would you like to see?
- 1: Clear goals from the outset. Regular contact in lots of different formats: business walks, newsletters, workshops etc. keep communicating what you're doing, what you're trying to achieve and listening to feedback
- 2: Business awareness people don't seem to recognize that you're in business unless you have a storefront. It can be a huge challenge.

Construction – lots of external providers. Why can't we provide on Bowen?

Forestry industry – need to consider management and development especially for fire purposes.

Housing – been an issue for years. Cost, construction costs, has been a constant issue and affects everything.

- 3 Businesses and key industries helping them survive and grow for our future
- 4 Would like to see more green technology. Everything from building codes to windmills and solar. Working from home rather than commuting. Maybe even an electric cable ferry!

Murray Atherton (Tourism Bowen Island and past Chamber of Commerce)

- 1: Tell me about your experience on the Chamber what worked, what didn't, why do you think it failed?
- 2: Tourism in your experience what's working well and what needs work?
- 3: In your opinion, what are Bowen's CED sticking points and how should they be addressed?
- 4: Who are the key groups / industries / economic drivers for Bowen now and moving forward?
- **5:** How do you envision Bowen's sustainable future? What would you like to see?
- 1: Grew tourism offering through Chamber initially newsletter, leaflets etc. Very successful. However, change of leadership in 2010 shut down all promotions and efforts and Chamber ultimately then failed.
- 2: Done a lot with not very much! But money is an issue. Too much to do and not enough funding.

It's also seen as a dirty word despite the fact we rely on it as a key economic driver.

3: BC ferries is problematic – difficult to get information and we are beholden to their schedule.

Accommodation – not enough and short-term rentals policy prohibitive.

- 4 Key businesses and stakeholders, Destination BC
- 5 Would like something positive to happen with Bowen Lodge i.e., a rehab centre. We also need a conference centre.

Total rewrite of OCP and Land Use Bylaws to encourage development.

Ferry marshalling that works!

Park and ride, commuter ferry from Government Wharf... anything that sustains tourism 12 months a year.

Tim Rhodes (past Chamber of Commerce, Tourism and Health)

- 1: Tell me about your experience on the Chamber what worked, what didn't, why do you think it failed?
- 2: Tourism in your experience what's working well and what needs work?
- 3: In your opinion, what are Bowen's CED sticking points and how should they be addressed?
- 4: Who are the key groups / industries / economic drivers for Bowen now and moving forward?
- **5:** How do you envision Bowen's sustainable future? What would you like to see?
- 1: Realising the need to help people get through winter, he started the Bowen Island Guide to drive tourism and help drive \$. This made a huge impact, doubling tourism dollars in 3 years. However, in change of Chamber leadership in 2010, all their work was dismantled, the guide and everything died off (as Murray also mentioned).
- 2: Did the guide for 10 years. Lots of people were very appreciative but didn't want to help or be involved. They just wanted it to "happen". After a while, they ran out of steam and stopped.
- 3: Council 2011-2014 were particularly restrictive and not forward thinking Cape Roger Curtis was the catalyst of this. Not enough information / communication for the public.

Housing and the economy – need to be addressed. Rentals in particular.

Healthcare – Lots of anxiety around healthcare.

Water – concerned about sustainable harvesting options e.g., collecting from roof etc.

- 4: BIRCH, Bowen Island Health Centre, TBI (or some version of it), Arts, Environmental groups, special interest groups e.g., Caring Circle, Rotary etc.
- 5: Sustainability Where to start? We need housing, healthcare, more people working from home and electronic commuting.

Also, overhaul OCP and Land-Use Bylaws to get rid of contradictions.

John Parker (past chair Community Economic Development)

- 1: Tell me about your experience on the CEDC what worked, what didn't?
- 2: In your opinion, what are Bowen's CED sticking points and how should they be addressed?
- 3: Who are the key groups / industries / economic drivers for Bowen now and moving forward?
- 4: How do you envision Bowen's sustainable future? What would you like to see?
- 1: "Village as a venue" was one key idea (put forward by Chris Corrigan) rather than seasonal tourism that John tried to promote. Supporting Arts, Eco-tourism etc. to support sustainable tourism.

Found Council processes a little restrictive to progression of CED initiatives and activities. Would be good to see more flexibility and forward thinking.

2: "Economy" – some people just didn't want growth. No tourists. No change. They found this was the residents' view however, not the businesses'.

Lack of communication and bureaucracy – lots of hoops to jump through and people getting frustrated. This was a constant issue.

Tourists - the constant dilemma!

- 3: Businesses they are the key to our economy
- 4: Need to grow our key industries e.g., tech and provide the infrastructure for them to be able to work here spaces to work, decent internet

Housing.

Mix of small, artisanal businesses and workshops

Either another ferry or alternative transport.

Decide if we want to be a bedroom community or a more self-sustainable, resilient community. If the latter, we need to open some larger businesses to help people love and work here, build housing, grow food etc.

Appendices - References

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