



Demographic Highlights:

- The city has grown at an average rate of 2% over the past decade, with an additional 16,000 residents living in the city between 2006-2016.
- The city is expected to grow at an annual rate of 1.1% to 1.7% to reach a population of 126,629 to 141,883 by 2046.
- The city is expected to continue aging, with the largest population growth rates among the 75 to 84 and 85+ age groups, growing at respective annual rates of 3.6% and 5.2%.



Demographic Highlights:

- The city's housing supply is estimated to grow from 39,170 units in 2016 to between 54,143 (38%) to 60,158 (54%) in 2046.
- Total job projections for the city will increase from 46,193 in 2016 to between 58,483 (27%) and 63,844 (38%) in 2046.
- Most of Nanaimo's major employment sectors have recently been growing, including those reliant on heavy and light industrial space.



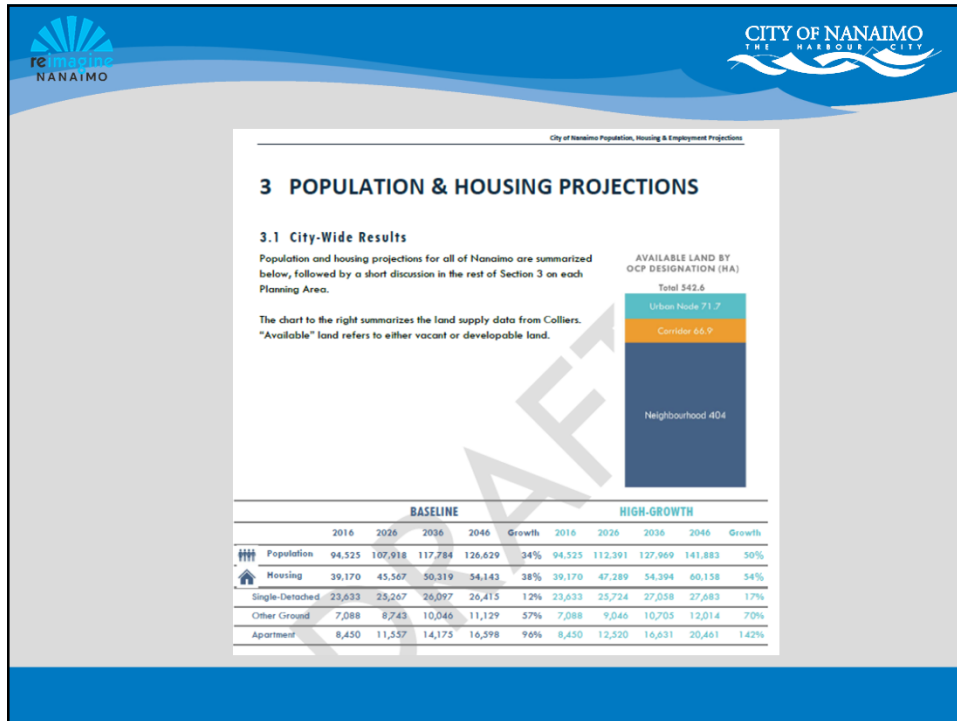
Demographic Highlights:



- The largest number of jobs are provided within retail sectors, followed by health care, accommodation/food services, construction, and education services.
- Nanaimo businesses have experienced strong growth in recent years, particularly in industries related to construction, professional, and health services.
- Since 2011, the adult working population is becoming increasingly educated with participation rates increasing every year since 2015.



Demographic Highlights:

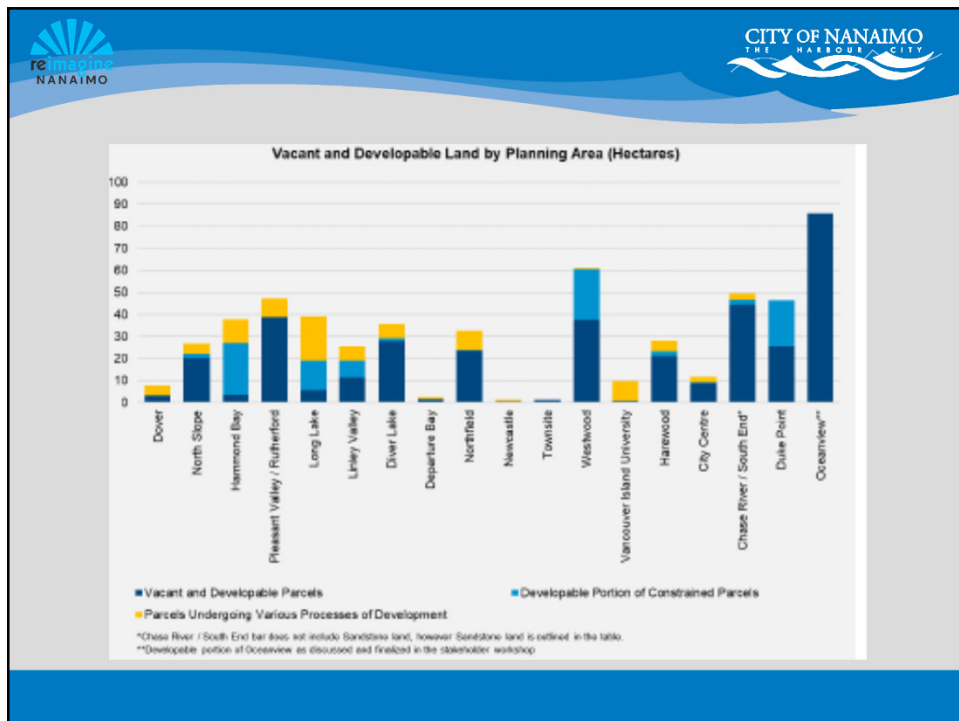
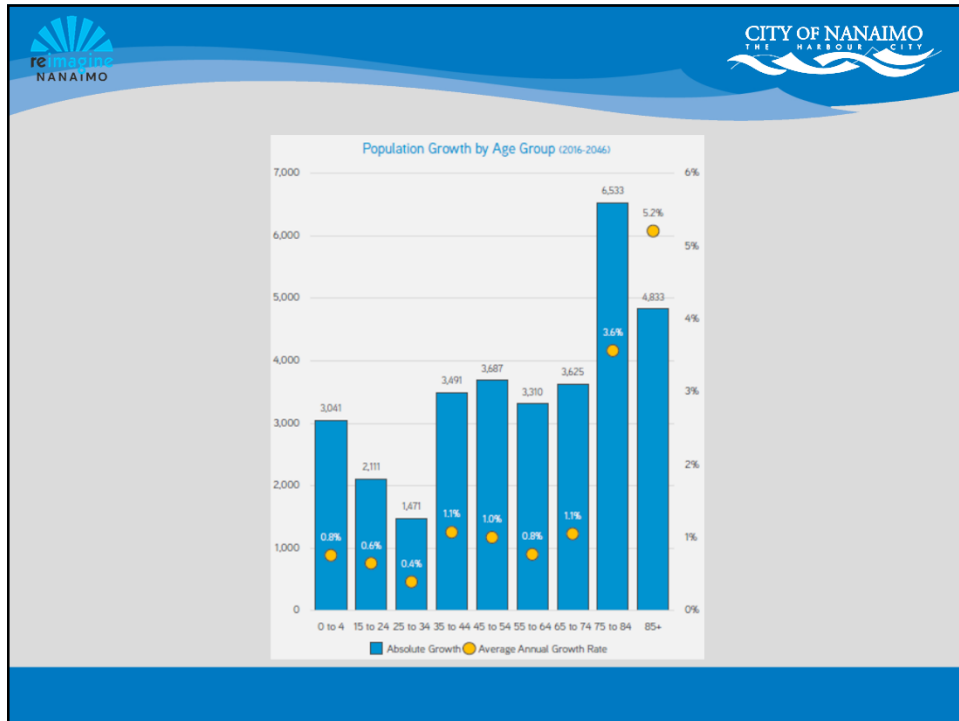
- Indicating a strengthening economy, Nanaimo's labour force participation rate has been increasing at a steady rate since a significant dip in 2014-2015.

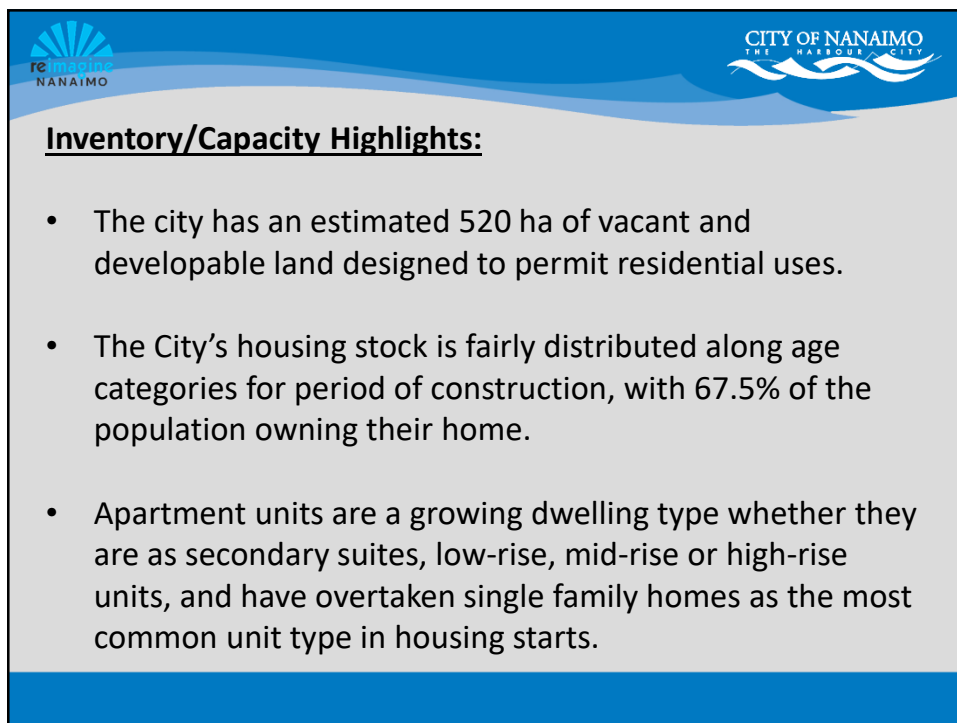


NANAIMO

	BASELINE SCENARIO							HIGH-GROWTH SCENARIO						
	2016	2026	2036	2046	Growth 2016-2046	Average Annual Change 2016-2046	% Growth 2016-2046	2016	2026	2036	2046	Growth 2016-2046	Average Annual Change 2016-2046	% Growth 2016-2046
Population	94,525	107,918	117,784	126,629	32,104	1,070	34%	94,525	112,391	127,969	141,883	47,358	1,579	50%
Age 0 to 14	13,351	15,304	15,526	16,392	3,041	101	23%	13,351	16,110	17,149	18,676	5,325	177	40%
Age 15 to 24	10,834	11,003	12,524	12,945	2,112	70	19%	10,834	11,862	13,618	14,737	3,903	130	36%
Age 25 to 34	12,372	12,070	12,133	13,843	1,471	49	12%	12,372	12,647	13,428	15,763	3,391	113	27%
Age 35 to 44	10,811	14,484	14,078	14,302	3,491	116	32%	10,811	15,061	15,370	16,237	5,426	181	50%
Age 45 to 54	12,228	12,654	16,166	15,915	3,687	123	30%	12,228	13,229	17,452	17,832	5,605	187	46%
Age 55 to 64	14,279	13,718	14,047	17,589	3,311	110	23%	14,279	14,288	15,311	19,464	5,186	173	36%
Age 65 to 74	11,457	15,165	14,572	15,082	3,626	121	32%	11,457	15,722	15,784	16,871	5,414	180	47%
Age 75 to 84	6,102	10,051	12,935	12,635	6,533	218	107%	6,102	10,284	13,719	13,931	7,829	261	126%
Age 85+	3,092	3,469	5,803	7,925	4,833	161	156%	3,092	3,469	5,938	8,372	5,280	176	171%
Housing Unit Demand	39,170	45,567	50,319	54,143	14,973	499	38%	39,170	47,289	54,394	60,158	20,988	700	54%
Single-Detached	23,633	25,267	26,097	26,415	2,783	93	12%	23,633	25,724	27,058	27,683	4,050	135	17%
Other Ground-Oriented	7,088	8,743	10,046	11,129	4,042	135	57%	7,088	9,046	10,705	12,014	4,926	164	70%
Apartment	8,450	11,557	14,175	16,598	8,148	272	96%	8,450	12,520	16,631	20,461	12,011	400	142%







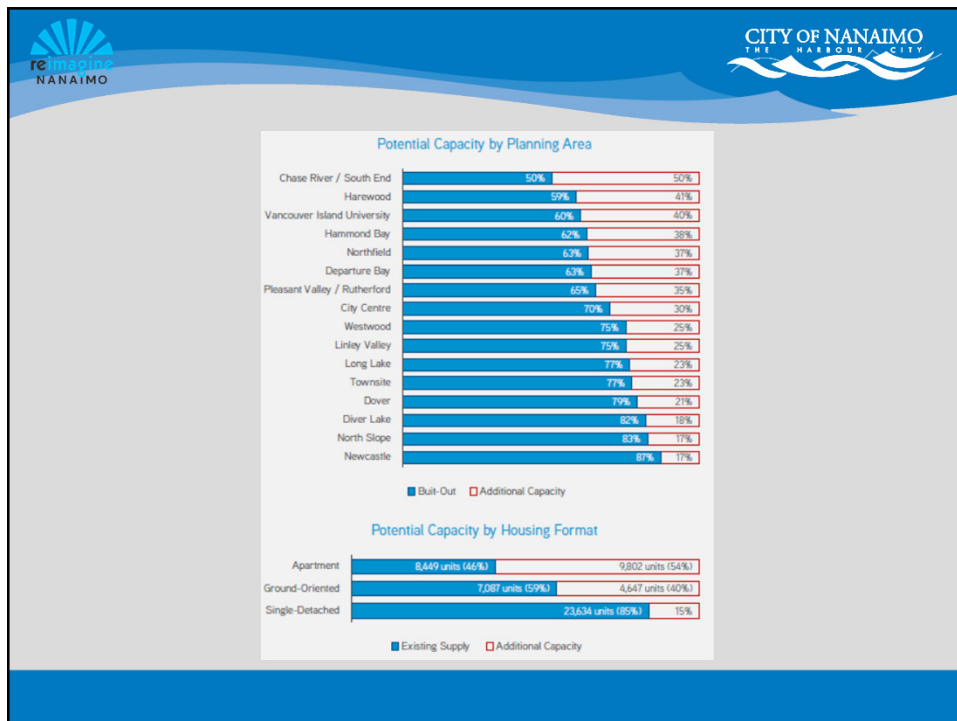
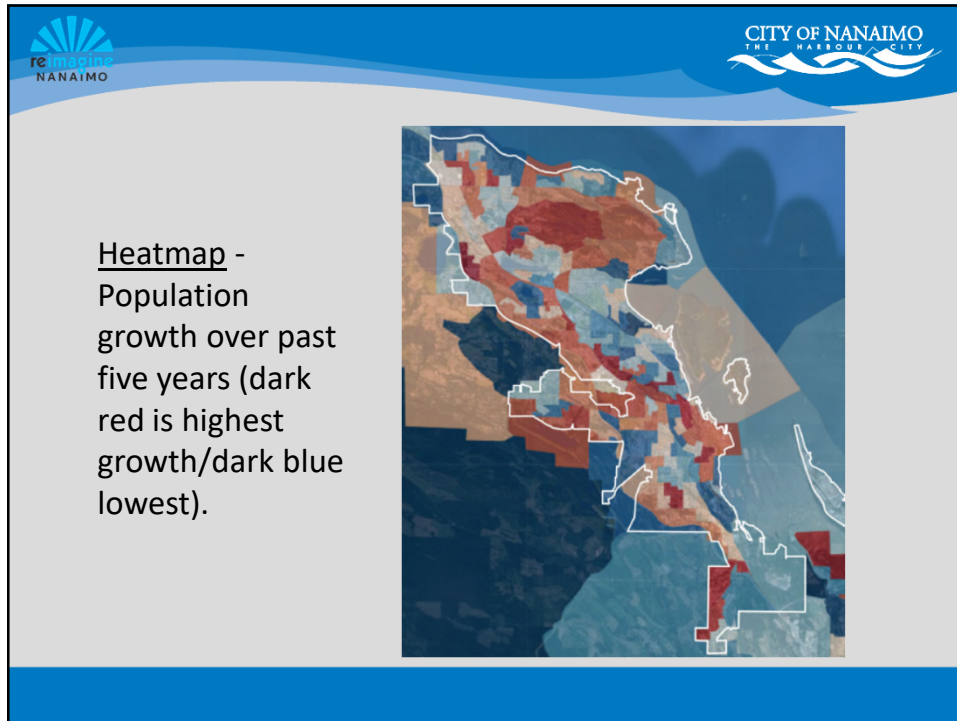
Inventory/Capacity Highlights:

- 2,354 new units were approved in Urban Nodes and Corridors in recent years with an additional 389 units in other residential areas of the city.
- Urban Nodes are meant to be a focal point for multi-residential development and have seen 462 units approved in recent years. This development has been exclusively concentrated in 2 out of the 5 Urban Nodes (Downtown and Woodgrove/North).



Inventory/Capacity Highlights:

- It is estimated the city will experience demand for an additional 253 to 607 hectares of residential land by 2046.
- The city is expected to have enough vacant and developable residential land to support future growth by 2046 except in a high-growth, low-density future land demand scenario.





Recommendation Highlights:

- Based on housing demand projections contained within the Demographic Report (an additional 253 to 607 ha of residential land by 2046), the city is likely to have enough land to fulfill future demand in all future land use scenarios except a high-growth, low-density scenario. In areas where residential development is not occurring, the City should consider partnerships that could act as an anchor or catalyst for residential development.



Recommendation Highlights:

- The City should also consider allowing for greater maximum building heights so that variances do not have to be sought out.
- It is also suggested the City conduct a city-wide parking study, and if possible, reduce parking requirements, especially for affordable housing projects. Continual investment in public transportation while creating complete and walkable communities may help to justify lower parking ratios.



Recommendation Highlights:

- The City should increase the maximum allowable density so that proponents can include more floor area in their developments without having to provide amenities as part of density bonusing. The City will need to decide whether a greater number of residential units is a satisfactory trade-off for the loss of amenities.



Commercial Land Use – Inventory/Capacity and Recommendations



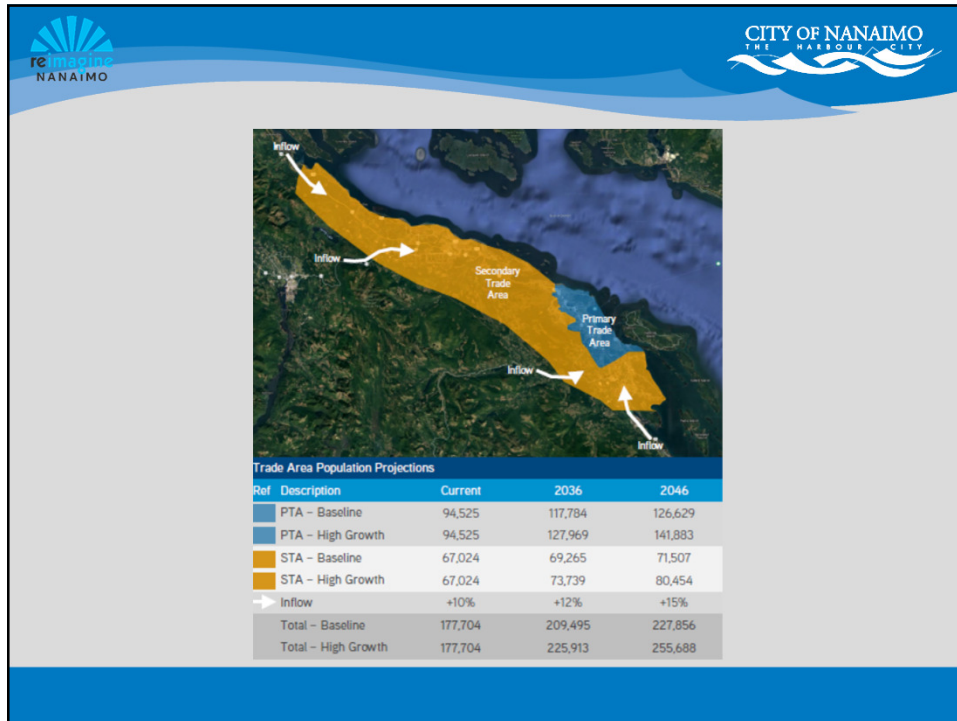
Inventory/Capacity Highlights:

- Most of Nanaimo's major employment sectors have recently been growing, including those reliant on heavy and light industrial space.
- The City is expected to experience gradual overall growth in office space demand.
- The City has an estimated 60 ha of vacant, developable land permitted for commercial development as one of the potential uses.



Inventory/Capacity Highlights:

- There has been approximately 30 ha of new commercial land development over the past decade, 55.2% of which was within Corridor OCP areas.
- The city's primary and secondary trade areas are expected to grow to a total population between 227,856 and 255,688 by 2046 and generate a total of \$3.12 billion and \$3.47 billion in captured expenditure by 2041.



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Inventory/Capacity Highlights:

- The city is expected to have sufficient amount of land designated to accommodate future projected commercial demand including an additional 29-38 ha of commercial employment land by 2041.

Expenditure Potential	2031	2041	Total Additional
Total Traditional Retail Floorspace Demand (sf)			
Baseline Growth	3,545,850	3,850,935	610,170
High Growth	3,628,364	4,015,964	775,198
Total Services Floorspace Demand (sf)			
Baseline Growth	732,444	795,556	126,224
High Growth	749,482	829,631	160,299
Total Office Floorspace Demand (sf)			
Baseline Growth	3,013,975	3,484,555	1,091,746
High Growth	3,345,512	3,867,856	1,403,046
Total Commercial Land Demand (hectares)			
Baseline Growth	310	324	29
High Growth	314	333	38

<u>Recommendation Highlights:</u>	
•	The City is expected to have a sufficient amount of land designated to permit commercial uses to accommodate future project demand. Rather than providing more land for commercial use, the City should identify a strategy to support the overall health of its existing retail nodes, particularly within Downtown and South Nanaimo.
•	Strong focus should be paid towards the retail environment within Downtown Nanaimo. The vitality of any city's downtown is highly reliant on a vibrant and diverse retail experience with a strong amount of footfall.



Recommendation Highlights:

- Aside from the addition of residential supply within Downtown, the City should consider “quick fix” interim projects and events, designed to animate the downtown and encourage better place making.
- Heavy emphasis by the City should be put towards the overall design of ground floor commercial units referring to design and development principles, such as direct street access, patio/exterior display areas, active storefronts, outdoor seating areas, large windows, and impactful signage.



Recommendation Highlights:

- Another key challenge facing many retailers is lack of suitable staff due to low unemployment rates and an aging population. The City could consider partnering with local academic institutions and retailers to create a retail training program that may help to supply more staff.



Recommendation Highlights:

- It is imperative to ensure commercial activity is not too spread out, particularly through the corridor areas, and the City should instead promote and support the infill of existing retail nodes as a way of cultivating a critical mass and mix of offerings, while potentially limiting commercial uses in some parts of the Corridor-designated lands and create more pedestrian connections between the growing residential areas surrounding the existing Urban Nodes.



Recommendation Highlights:

- The one retail format noted as lacking in the city is small-scale convenience nodes within neighbourhoods within five-minutes walk of most residents. The City could designate small parcels of land suitable to accommodate 5,000 – 10,000 sf of commercial floor space within areas lacking true convenience nodes.



Recommendation Highlights:

- Many non-profit groups within Nanaimo have expressed concern regarding the availability of affordable space. To accommodate the needs of these groups, the City could consider the reuse and revitalization of older persistently vacant buildings with sharing-space models for groups that are expected to be compatible with one another. This could also include financial assistance and help negotiating favourable leases with landlords.



Industrial Land Use – Inventory/Capacity and Recommendations



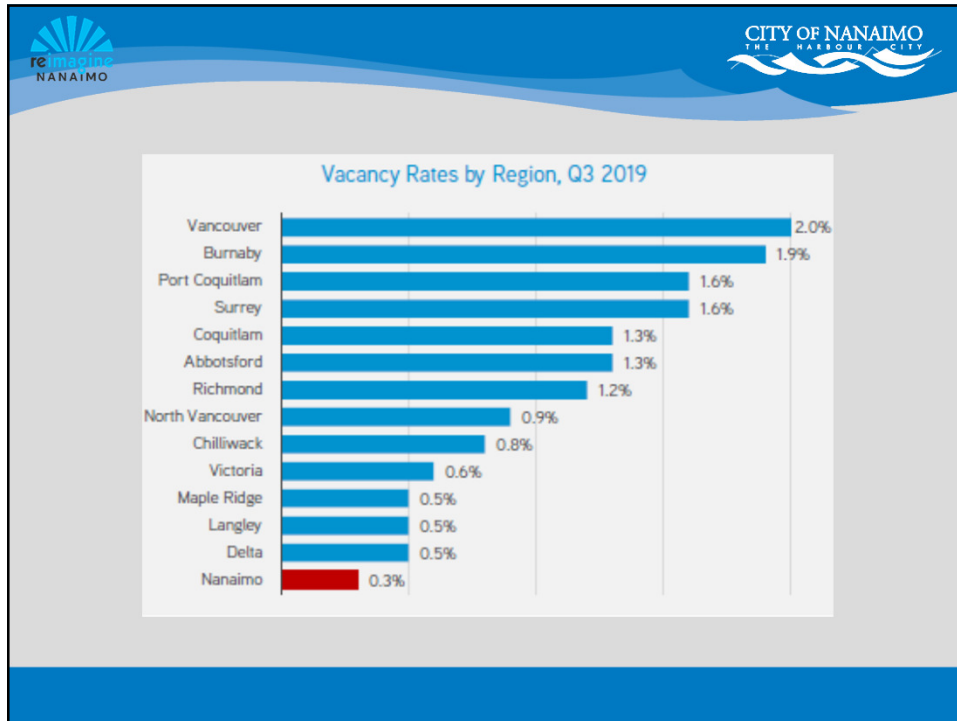
Inventory/Capacity Highlights:

- Industrial space is in high demand in Nanaimo due to limited supply and strong demand. Well located industrial land across the region is scarce.
- The city has a total of 661 ha of industrial-designated land, primarily within the Duke Point and Northfield Boxwood Areas.
- The city currently has an estimated 64 ha of developable industrial land, with an additional 10 ha of land with construction occurring on it.



Inventory/Capacity Highlights:

- There has been approximately 6 ha of new industrial supply developed over the past decade, with development in nearly all suitable land parcels.
- Under a high-growth scenario, the utilization of all developable and potential industrial land represents approximately 18 years of supply.



Recommendation Highlights:

- It is important for the City to create new industrial supply as the amount of vacant industrial land is not expected to fulfill future demand by 2041.
- Within the Boxwood area, the development of the 11 ha of vacant lots south of Nanaimo Parkway (behind Cavalotti Lodge) should be encouraged.
- The owners of industrially-zoned lots over 2 ha in size should be engaged by the City to identify where possible, ways to incentivize the development of this land.



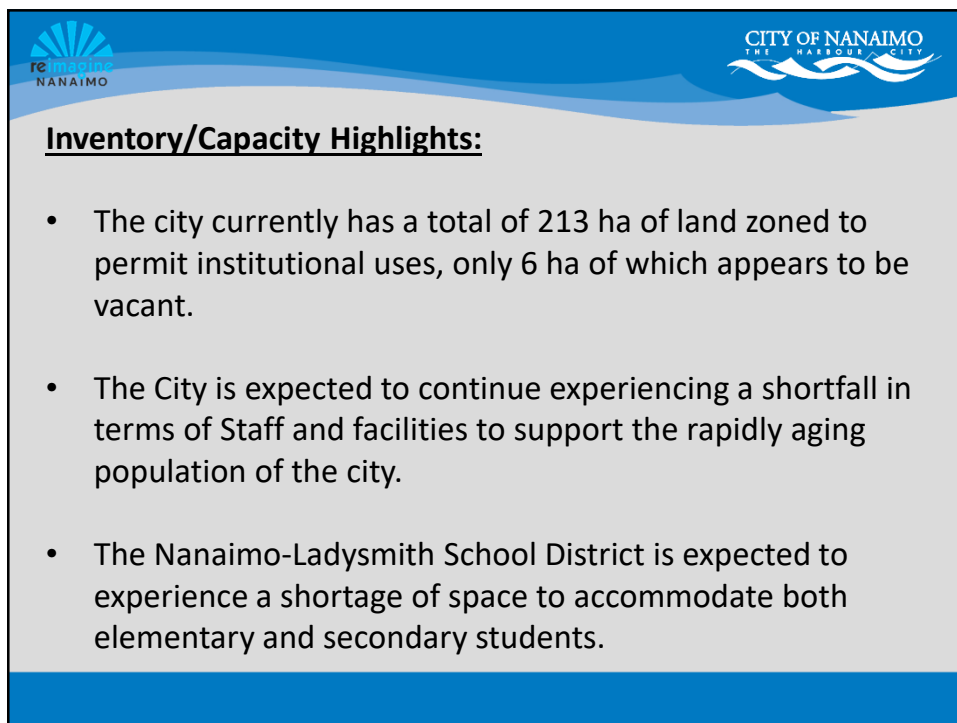
Recommendation Highlights:

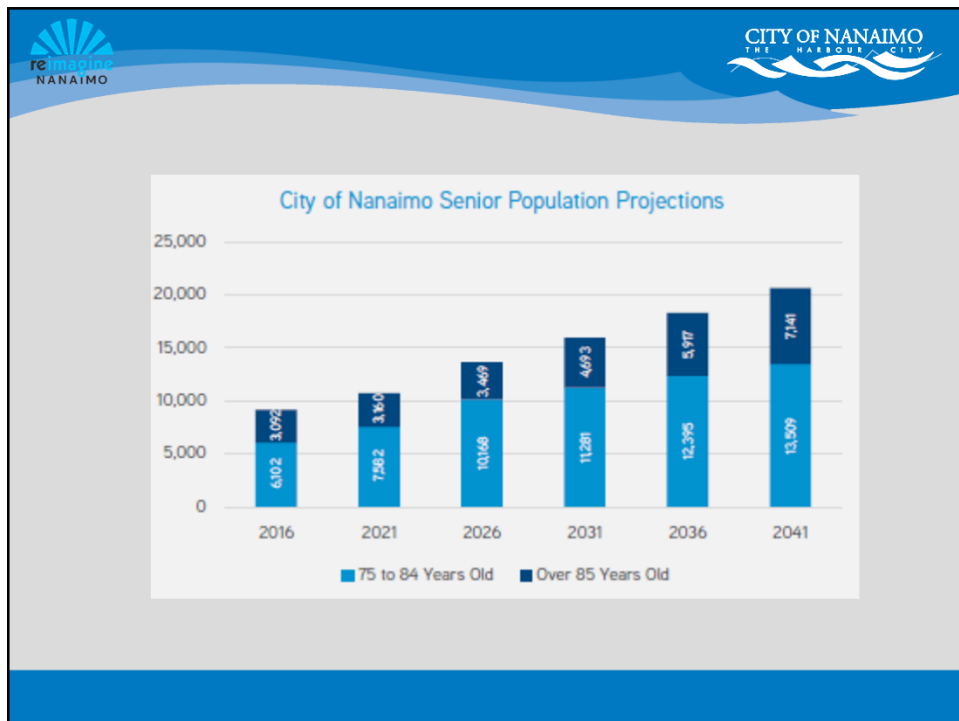
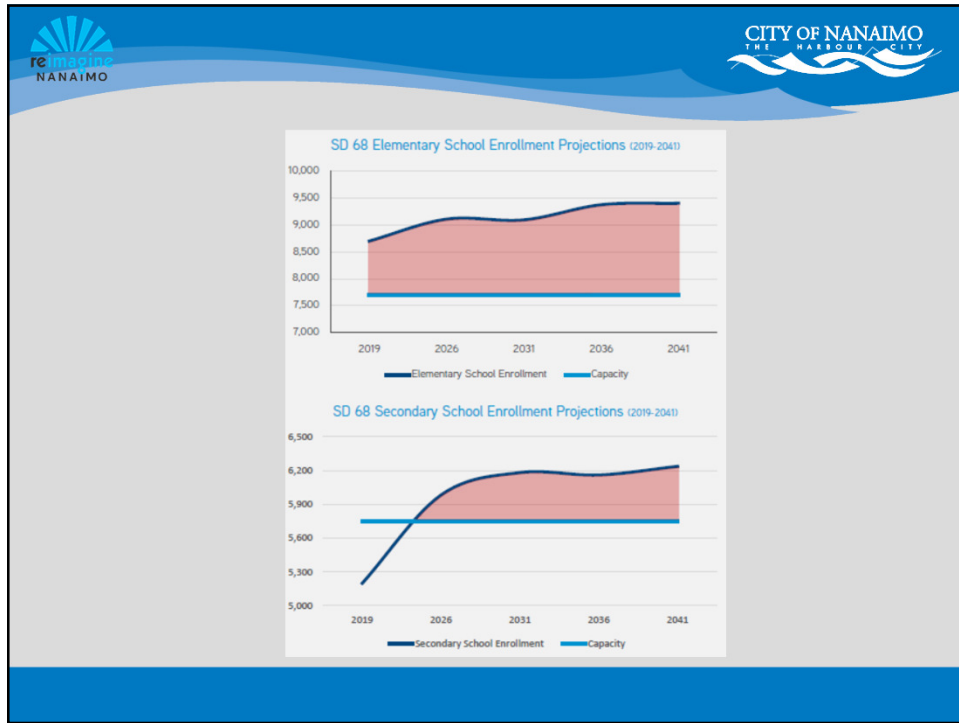
- The process of considering Oceanview for industrial development should begin, including an assessment of the total amount of space within the area that is viable for industrial use.
- The City should support developers if they wish to construct multi-level industrial buildings by reassessing any potential barriers to such development, including permitting new industrial uses, such as e-commerce, and adjusting density caps, such as building height limits, setbacks, and site coverage maximums.



Recommendation Highlights:

- The City could also consider the amalgamation of land outside of the Urban Containment Boundary for industrial use, specifically 44 ha of existing industrial lands south of the city boundary along the Island Highway.







Recommendation Highlights:

- The City will need to work closely with SD 68 as they develop their new long-range facilities plan in identifying the future land needs and potential locations for new or expanded school sites.
- It is also imperative the City examine the growing land demands for seniors' housing and care facilities. The City should work with the Island Health to further identify future land requirements based on internal projections.



Questions?