

# **City of Nanaimo**

## **Five-Year Official Community Plan Review**

### **GROWTH CENTRE CONCEPT ASSESSMENT**

## **Policy Directions Report**

(including Technical Background)



*Town Centre – Downtown Nanaimo*

# **FINAL REPORT**

Prepared for

**The City of Nanaimo**

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## **Executive Summary**

### **Background**

The City of Nanaimo is undertaking a four-phased review of Plan Nanaimo. Phase Two and Three of this review involves an assessment of the Plan's Growth Centre Concept. The City retained a consultant team of UMA Engineering Ltd., Urban Futures Incorporated, and Urbanics Consultants Ltd. to carry out this assessment. The Technical Background Document summarizes a review of past, future and current population, residential and commercial characteristics and the relationship of the analysis to the Growth Center Concept.

### **Introduction**

The Growth Centre Concept is pivotal to Goal One of Plan Nanaimo to build complete, viable communities. Growth Centres is the collective name for Town Centres (6 are identified in the Plan) and Neighbourhood Villages (11 are identified). Plan policies support a range of urban land uses within growth centers where residents can live, work and play within close proximity. Previous studies related to the Growth Centre Concept were also reviewed.

### **Population Review**

Projections of population growth and change, together with their associated impacts on housing occupancy demand for Nanaimo were prepared. Highlights of the population review include the following:

- The City's population is projected to grow by an additional 37,000 people over the next 30 years – 48% growth
- Regional growth will continue at a faster rate than the City's population
- The 65 to 79 age group will have the greatest relative growth, an indication of a rapidly aging population

### **Housing Implications**

The impacts of population growth and change are shown by the following anticipated projections for housing demand:

- Housing occupancy demand will increase faster than total population due to rapid growth in the older age groups and higher household maintainer rates
- Net additional demand for 11,420 ground oriented units is over one and a half times the additional for other structure types (7,410 units) – this is driven by the growth in the 50 plus population where maintainer rates for ground oriented accommodate predominate
- Aging population will result in demand for owner occupied dwellings

### **Commercial Forecast**

A review of commercial, both retail and office components, was undertaken. The following highlights some of the key findings:

- Retail development is a function of population growth both within the City and the larger trade area – representing the City’s role as the regional retail/service center for central/north Island
- The geographical distribution of new retail and service floor-space towards the north sector emphasizes the high visibility, high exposure locations offered by the area in contrast to other parts of Nanaimo
- Downtown office space has experienced a substantial decline proportionally compared to other parts of the City

### **Issues Matrix Preparation**

In order to gain an understanding of the implications from the analysis, an issues matrix was prepared to assess common themes generated from the findings. The issues matrix considers questions raised, issues addressed, an assessment of findings, potential monitoring indicator, and the implications for scenario development.

### **Community Consultation**

Opportunities for public input during the Growth Centre Assessment included a stakeholder workshop with invited community members, two public information open houses and a meeting with the Plan Nanaimo Advisory Committee. The nature of the comments generally supported the growth center concept with some suggestions to:

- eliminate or re-order specific growth centers or include others
- better define the spatial extent, nature of land uses, and unique characteristics of Town Centres and Neighbourhood Villages
- provide specific development guidelines for each Town Centre
- continue support for Downtown and emphasize harbour and waterfront areas

### **Potential Scenarios for the Growth Centre Concept**

The findings suggest a refocusing of the vision for the growth center concept in Nanaimo. The following are key considerations for refocusing:

- reduce the number of Town Centres to recognize population forecasts and characteristics
- consolidate two of the Town Centres to recognize existing development patterns (Woodgrove/Rutherford)



- realign target population and densities in Town Centres and Neighbourhood Villages to reflect changing demographics and forecast for ground oriented housing
- focus on hierarchy of centers to acknowledge the regional function of three unique town centers: Woodgrove/Rutherford, Hospital, and Downtown and prioritize the development of Structure Plans for the three regional centres

### **Scenario Development**

Three scenarios for consideration were developed including:

**Scenario 1:** Status Quo with no major policy changes to established OCP policy framework of 6 Town Centres, 11 Neighbourhood Villages, and the current urban containment boundary

**Scenario 2:** Refocused Growth Centres with 3 Regional Centres (Woodgrove, Hospital, Downtown) and 8 Neighbourhood Villages (North Wellington, Country Club, Northfield and Bowen, Bruce and Fifth Street, Chase River, Northbrook, Terminal Park, Wakesiah and Jingle Pot).

**Scenario 3:** Refocused Downtown with a refocusing of development Downtown Nanaimo as the primary growth center and one large regional shopping concentration in Woodgrove/Rutherford.

Following a City staff workshop, Scenario 2 a Refocused Growth Centre Concept was confirmed as the preferred scenario.

### **Sensitivity Analysis**

A sensitivity analysis was undertaken to determine the potential impact of varying population growth alternatives for the City on future needs for housing and retail commercial office floor area. The analysis determined a population increase ranging between 27,300 (low forecast) to 52,700 (high forecast) new residents, and a housing forecast ranging between 15,300 and 24,300 additional dwelling units. For commercial retail space a range of 2.3 million square feet to 2.8 million square feet was determined, while for office space a range of .9 million square feet to 1.7 million square feet was forecast.

### **Recommendations for Policy Change and Action**

Policy changes to Plan Nanaimo which would refocus the growth centre concept as currently embraced in Plan Nanaimo are recommended. Generally, the fundamental changes to Plan Nanaimo with respect to the growth centre concept are:

- Reduction in the number of primary growth centres from 6 Town Centres to 3 Regional Service Centres
- Reduction in the number of secondary growth centres from 11 Neighbourhood Villages to 8
- Recognition of the specialty function of each of the Regional Service Centres
- Emphasis on the need to develop Area Structure Plans for each of the growth centres

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## **1.0 Introduction**

### **1.1 BACKGROUND**

The City of Nanaimo is currently undertaking a four-phased review of its Official Community Plan also known as Plan Nanaimo. Adopted in 1996, Plan Nanaimo is now more than five years old. Phase One of the review has been completed. The first phase involved extensive community consultation with the public, stakeholder groups, Council, and City staff. From this process, the priorities for Plan improvement were determined. The first priority identified was an assessment of the “Growth Centre Concept” of the Plan.

In June, 2002, following a selection process, the consulting firm of UMA Engineering Ltd. in association with Urban Futures Incorporated and Urbanics Consultants Ltd. was retained by the City of Nanaimo to provide a Phase Two and Three review of the Plan with respect to the viability of the Growth Centre Concept. The City sought consultation on the growth centre concept and the effectiveness of the concept given future projections for community growth and change in the City and its surrounding region, specifically population and residential/commercial demand.

#### **The Issue**

The growth centre concept is pivotal to Plan Nanaimo. Therefore, an assessment, more than five years after Plan adoption, of its validity and applicability to Nanaimo is critical. Unlike other regional urban centres, such as Greater Vancouver and the Capital Regional District, Nanaimo:

- has experienced a significant recent decline (late 90's) in the local economy, after the initial adoption of the plan,
- contains relatively inexpensive single family housing, and
- requires changes in standard development practices in order to achieve complete, viable communities.

These factors, as well as other issues, such as the changing retail market and an aging population, may affect the City's ability to achieve the growth centre concept. The questions being asked are: “Is the growth centre concept achievable in the City of Nanaimo?” “What are the advantages and disadvantages?” And, if the growth centre concept is achievable, “What actions are required to achieve viable growth centres within the Official Community Plan?”

#### **The Project**

The assigned project was undertaken over two phases, to produce a Technical Background Document at the conclusion of Phase Two. The Technical Background Document summarizes a

review of past, future and current population, residential and commercial characteristics and the relationship of the analysis to the Growth Center Concept. The draft Technical Background Report was submitted to City staff for review and comment in March 2003.

This Policy Directions Report followed the completion of Phase Three (April 2004). The focus of this Policy Directions Report is an assessment of the viability of the growth centre concept as Phase Two and the development of scenarios as Phase Three of the OCP review.

Public consultation was a component of the assessment. A combination of City staff meetings, a stakeholder workshop, public open houses and a Plan Nanaimo Advisory Committee meeting provided opportunities for appropriate input at project milestones.

The Growth Centre Assessment has:

- Reviewed trends in population, residential and commercial development and how they may impact the development of growth centres as presented in Plan Nanaimo. (What are the implications to the development of growth centres in Nanaimo?)
- Consolidated information to gain an understanding of implications for growth centre evolution.
- Included input for the public, stakeholders, Council and City staff. (What are the opinions of the community towards growth centres and implications given various trends?)
- Suggested various alternative planning scenarios for OCP policies (What scenario results when different options are tested?)

## **1.2 REPORT PURPOSE AND ORGANIZATION**

The purpose of this Policy Direction Report is to summarize:

- the Technical Background used as a basis to develop various growth scenarios including an assessment of current and future population, implications for residential and commercial demands/trends
- community consultation
- development of growth scenarios and preferred growth scenario
- sensitivity analysis
- recommendations for policy change and action

As such, this report is organized to provide the following information:

- Review of Plan Nanaimo and the Growth Center Concept
- Review Relevant Past Studies related to the Growth Centre Concept
- Outline of Demographic Characteristics: Historical Growth, Current Population, and Forecast
- Description of Housing Projections (demand and type)
- Overview of Commercial Development: Historical and Projections
- Implications for Future Scenario Development: The Issues Matrix
- Summary of Community Consultation
- Development of Various Growth Scenarios
- Understanding of Sensitivity Analysis
- Recommendations for policy change and action

### **1.3 PLAN NANAIMO AND THE GROWTH CENTRE CONCEPT**

Nanaimo’s Official Community Plan (OCP), or Plan Nanaimo, sets out broad objectives and policies for managing future growth with respect to the form and character of existing and future land use and servicing in the City. Following a comprehensive public involvement process, the Plan was adopted in 1996.

The City’s Official Community Plan establishes a new direction for Nanaimo, outlining urban, environmental and mobility goals within a long term strategy. Drawing on the vision created through “Imagine Nanaimo”, the Plan lays out five main goals. Goal One is to “Build Complete, Viable Communities” which “means creating Town Centres, Neighbourhood Villages and Neighbourhoods that support a variety of lifestyle choices and that offer a pleasant, convenient, urban environment.” (page 1-1) The manifestation of this goal in the Plan is the focus of this project to assess the Growth Centre Concept Assessment.

Growth Centres, as defined in Plan Nanaimo, is the collective name of “Town Centres”, “Regional Shopping Town Centres” and “Neighbourhood Villages”. Policies in the Plan indicate that future growth is to be focused within Growth Centres. Growth Centres are intended as complete communities to “offer a broad range of shopping and commercial services, employment opportunities, housing forms, open space, and amenities” (page 1-1). Plan policies direct urban densities and a mix of land uses to the Growth Centres. The Centres are identified in Plan Nanaimo on Schedule A: Future Land Use and Mobility.

The Growth Centre Concept is pivotal to Goal One of Plan Nanaimo to build complete, viable communities. Growth Centres is the collective name for Town Centres (6 are identified in the Plan)

and Neighbourhood Villages (11 are identified). The Plan states: “Build complete, viable communities means create Town Centres, Neighbourhood Villages and neighbourhoods that collectively support a variety of lifestyle choices and that offer a pleasant, convenient, urban environment.” and that “Town Centres, Regional Shopping Town Centres and Neighbourhood Villages are Growth Centres...”. As a result, the Plan identifies growth centres and provides policies to focus urban development within these centres. The Plan provides for a number of growth centres, together with a mix of land uses within the growth centres, including public open space. In essence, Plan Nanaimo policies support a range of urban land uses within growth centers where residents can live, work and play.

Plan policies related to Goal One include the following:

- Emphasize a wide variety of permitted uses: residential, commercial, institutional, community uses
- Encourage a range of housing options (form and tenure)
- Promote the creation of “mainstreets” for most growth centres
- Encourage a mix of use within each development site

The Plan identifies the need to create Structure Plans for each of the Town Centres and suggests that the Structure Plans be based on a population of 5,000 to 10,000, with target residential density for the core 100 to 150 units per ha. The Town Centres are clearly delineated on Schedule A in the Plan. Generally, the Town Centres are allocated around existing commercial nodes (shopping centres) that are spaced to reflect Nanaimo’s linear development pattern with Woodgrove/Rutherford in the northern sector and Chase River located to the south.

There are six Town Centres identified in the Plan, including:

- Chase River (also referred to as Southgate)
- Downtown
- Townsite (also referred to as Hospital)
- Country Club
- Rutherford
- Woodgrove Regional Shopping

In addition, there are 11 Neighbourhood Villages identified in the Plan, including the following:

- Bruce and Eight Street
- Bruce and Fifth Street
- Southend (Haliburton)
- Wakesiah and Jingle Pot (Second Street)
- Terminal Park to Pearson Bridge (Estevan and Terminal Avenue)
- Northbrook
- Sealand
- Departure Bay
- Northfield and Bowen Road
- Wellington Townsite (North Wellington)
- Southside (Tenth Street)

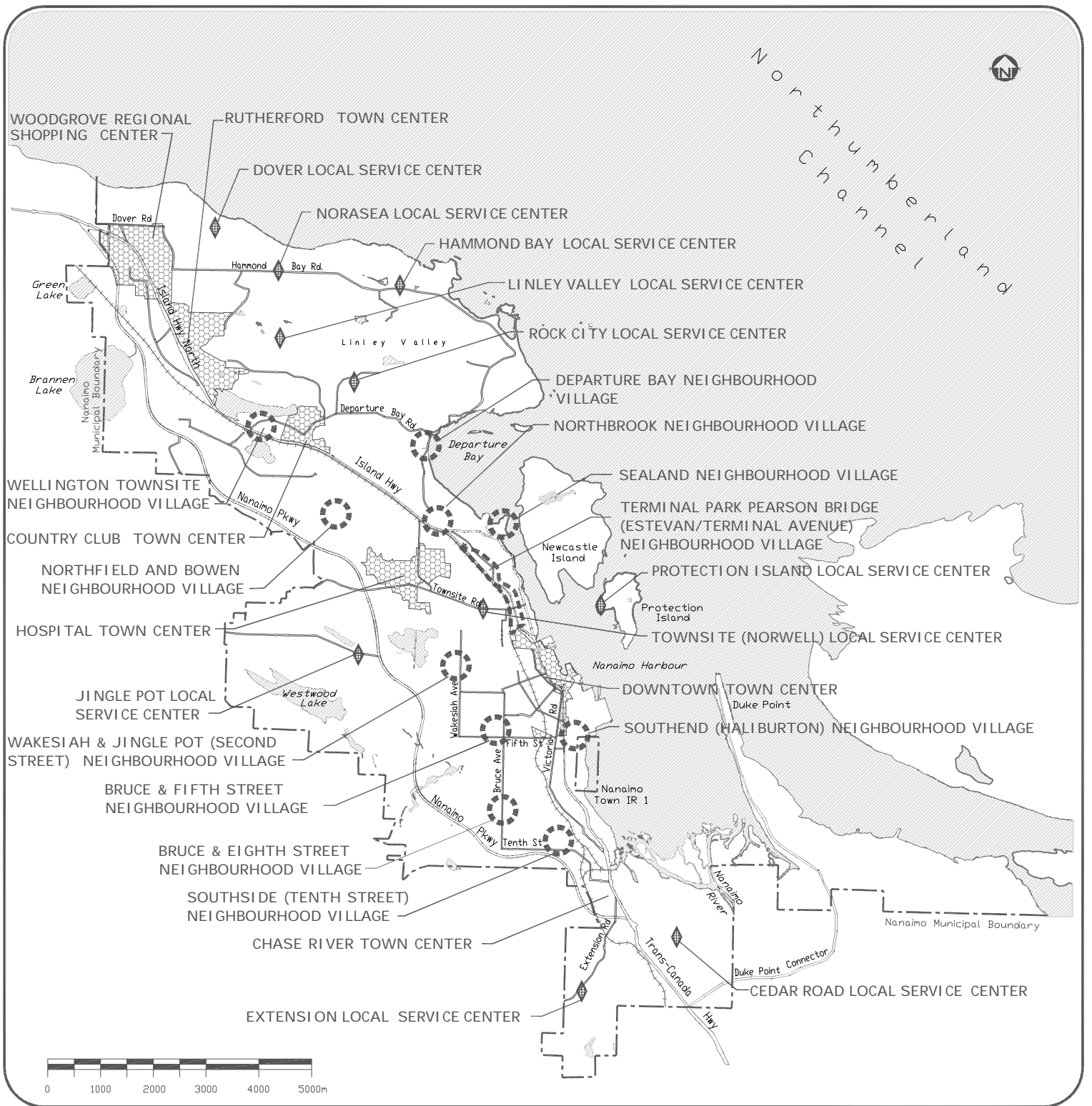
Neighbourhood Villages are conceptually shown on Schedule A of the OCP rather than specifically identified. The Plan establishes the goal to develop Neighbourhood Village Concept Plans, part of which is to include Main Street locations in many of the Villages. To-date, a Structure Plan has been completed for Woodgrove Regional Shopping Centre (not adopted by Council). Neighbourhood Plans have been completed for: Chase River, Old City, Downtown, and Hammond Bay.

Related to the Growth Centre Concept, the Plan also establishes:

- Local Service Centres - defined as “small scale service centers providing commercial and community services for local neighbourhoods” (page 1-2). They are conceptually identified and their location dependant on Neighbourhood Plans. They are not intended as complete communities/but rather centres to serve the local communities convenience needs.
- Mainstreets – defined as “pedestrian oriented forms of commercial and residential development that form the core or center of Neighbourhood Villages” (page 1-2) and some Town Centres including Hospital and Chase River
- Highway Commercial Designation
- Neighbourhood and Suburban Neighbourhood Designation.

A map showing the schematic locations of growth centers is provided on the following page.





## City of Nanaimo

### GROWTH STRATEGY REVIEW

# LOCATION OF GROWTH CENTERS

## The Issue

The “Growth Centre” concept is one of the cornerstones of the Plan Nanaimo. The primary objective of the concept is to build complete, viable communities within identified growth centers. A growth center is intended as a complete community within the larger City-wide geographic area. Growth centers are proposed as an alternative to suburban living, offering a denser, mixed community where residents can live, work and play within walking and cycling distances.

The growth centre concept is pivotal to Plan Nanaimo. Therefore, an assessment, more than five years after Plan adoption, of its validity and applicability to Nanaimo is critical. Unlike other regional urban centres, such as Greater Vancouver and the Capital Regional District of Nanaimo:

- has experienced a significant decline (late 90’s) in the local economy after initial adoption of the Plan,
- contains relatively inexpensive single family housing within and outside city boundaries, and
- requires changes in standard development practices in order to achieve complete, viable communities.

These factors, as well as other issues, such as the ever-changing retail market and an aging population, may affect the City’s ability to achieve the growth centre concept. The questions being asked are: “Is the growth centre concept achievable in the City of Nanaimo?” “What are the advantages and disadvantages?” And, if the growth centre concept is achievable, “What actions are required to achieve viable growth centres within the Official Community Plan?”

The Growth Centre Assessment has:

- Reviewed trends in population, residential and commercial development and how they may impact the development of growth centres as presented in Plan Nanaimo. (What are the implications to the development of growth centres in Nanaimo?)
- Consolidated information to gain an understanding of implications for growth centre evolution.
- Included input for the public, stakeholders, Council and City staff (What are the opinions of the community towards growth centres and implications given various trends?)
- Suggested various alternative planning scenarios for OCP policies (What scenario results when different options are tested?)

## **1.4 REVIEW OF RELEVANT PAST STUDIES**

To provide a basis of understanding the growth centre concept, a number of documents including past studies was reviewed. A summary of the documents reviewed for the Growth Centre Concept assessment is provided in this section. Since the adoption of Plan Nanaimo and immediately prior to OCP adoption, the City of Nanaimo undertook a significant number of planning-related studies and collected a range of data and information.

The focus of this document review has been an understanding of the vision, goals, and key policies contained in Plan Nanaimo and other City documents as they relate to the Growth Centre Concept. A review of the most relevant documents has been provided which form a basis of planning information. Documents on economic trends etc. and others have been reviewed for information but, in an interest of brevity, a summary of each these has directly related documents has not been provided but forms the backdrop of the economic section in this document.

### **1. City of Nanaimo Strategic Planning, Progress Nanaimo, 1998, “Monitoring Achievement of Plan Nanaimo Goals”**

Progress Nanaimo is an audit of the progress toward Plan Nanaimo goals and objectives. Progress Nanaimo establishes indicators to track progress and outlines targets to be reached. With respect to Growth Centres, Progress Nanaimo asks “Are vibrant, mixed-use Growth Centres being created?” The indicators measured were: number of residential units per hectare (uph) and proportion of land in different uses. It was found that residential density averaged 5.8 uph in 1996, well below target density of 100 to 150 uph and while most Centres had some mix of uses, largely devoted to commercial and residential, averaged only 4% park/open space, compared to a target of 20%. The report concludes that more residential and public open space are required in Town Centres.

### **2. Nanaimo Official Community Plan 5-Year Review “Phase One Results of the Preliminary Consultation Process”, Prepared for the City of Nanaimo by Urban Aspects Consulting Group, November 2001**

The primary goal of the Phase One review was to obtain input on the impact of Plan Nanaimo policies: what worked, what didn't and what needs to be addressed through consultation with stakeholders and the public? The highest priority indicates the need to review growth centers, including the Downtown. (page 23)

### **3. “Nanaimo Downtown Plan”, adopted as part of the City of Nanaimo Official Community Plan on 2002 May 27 in Bylaw No. 6000.038.**

This document reformats the Concept Plan for Downtown Nanaimo, prepared for the City of Nanaimo by the Spaxman Consulting Group Ltd., November, 2001. The Downtown Plan

provides context, outlines a vision, establishes policies and land use, and implementation measures. The Plan is based on: encouraging Downtown living, improving the physical environment, strengthening downtown businesses, enhancing the waterfront/natural environment, improving accessibility, identifying distinct character areas, and creating attractive linkages.

**4. “Analysis of the Downtown Residential Market in Nanaimo”, Prepared by: Coriolis Consulting Corp., April 2002, Draft.**

The report’s objective was to describe the downtown residential market and prospects for the future in an effort to prepare a marketing strategy to heighten the Downtown’s residential market profile. The Report outlines the nature of the Downtown housing market, opportunities/constraints for future residential growth, and target markets. The Report concludes that “there are good prospects for drawing more people to live in downtown Nanaimo, in condominium and rental housing, because downtown’s attractiveness will continue to increase and because the market is growing in all age groups. However, prices for new units must increase significantly before the rate of new unit construction will exceed the very low rate of activity experienced...” Target markets are: Nanaimo regional residents moving out of single family homes, near retirement and retirement couples from outside the region, self-employed people, younger people looking for rental housing/affordable condo units.

**5. Feasibility of New Market Housing In Downtown Nanaimo, prepared by John Jessup, January, 2001, Draft.**

The study objectives included the development of a pro forma model for assessing profitability of new market housing in Downtown Nanaimo using three test sites. The report concludes with a number of recommendations for changes to zoning densities, setbacks, parking requirements and height restrictions for multi-family development to make multi-family more viable. The study also recommends elimination of Development Cost Charges for multi-family within specific zones and consideration of density transfer for heritage buildings.

**6. Action Plan for Downtown Residential Conversion, prepared by Mainstreet Designers et. al., January, 2001.**

The Action Plan is a summary report with recommended strategies to implement residential conversion in Downtown Nanaimo. The strategy includes incentive program, changes to City policies, and streamlining the approvals process.

**7. Mainstreet Guidelines for Nanaimo’s Neighbourhood Villages, prepared by Spaxman Consulting Group/Reid Crowther & Partners Ltd., July, 1997.**

Plan Nanaimo identifies 11 neighbourhood villages, 7 of which has a mainstreet component – the commercial and social focus of each village. This study expands on the Mainstreet elements outlined in Plan Nanaimo, including the development of design guidelines, zoning bylaw regulations, and engineering standards for mainstreets. The study provides an outline of mainstreet elements, reviews the characteristics of proposed mainstreets, and uses Departure Bay as a test case study.

**8. Chase River Neighbourhood Plan, adopted as part of the City of Nanaimo Official Community Plan as Bylaw No. 6000.023**

Within the framework of Plan Nanaimo, the Chase River Neighbourhood Plan outlines the vision and policies unique to Chase River, the southern gateway community with a rural atmosphere. The Chase River Plan follows through with the Growth Centre Concept policies of Plan Nanaimo containing policies for building complete and viable neighbourhoods with a town centre, and two local service centres.

**9. Regional District of Nanaimo, Growth Management Plan, Bylaw No. 985, adopted 1997, Consolidated November 9, 1999**

The Regional District’s growth strategy provides a vision of a desirable future for the regional district and outlines a strategy for attaining that future. Eight goals are established, including one to “create complete, liveable communities” (page 14). The nodal structure provides a vision of pedestrian-friendly, mixed-use communities surrounded by open space (page 28) – they are intended as complete communities. Plan Nanaimo’s Growth Centre Concept is consistent with the nodal structure policies of the RDN’s Growth Management Plan.

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## **2.0 Population and Housing Review**

### **2.1 INTRODUCTION**

As part of the growth centre concept assessment, Urban Futures Incorporated was retained to prepare projections of population change and growth and their associated impacts on housing occupancy demand in the City of Nanaimo between 2001 and 2031. These projections provide the City with estimates of the magnitude and character of change it will experience in the size and the composition of both its population and its households. As well, it will provide the City with demographic and housing demand inputs for a number of its long-range land use, transportation and service delivery planning programs. These projections will provide the basis for a greater understanding of the change that the City must both anticipate and, more importantly, plan for, in the coming years.

Section 2.0 has two major sub-sections. Sub-section (2.2) focuses on the demographics of the City of Nanaimo and its surrounding Regional District. It opens with a brief review of the history of population growth in Nanaimo followed by a discussion of the age structure of its current population, and of the trends that will shape its future population. It then presents a trend projection of Nanaimo's population from 2001 to 2031 that establishes the demographic base for the housing occupancy demand projections that are the focus for the second major section of the report.

Sub-section (2.3) opens with an examination of the link between demographics and housing that is revealed in the City's prevailing household occupancy patterns. In this context, the focus is on age of householders, structure type, and tenure of dwellings. These factors establish the life cycle pattern of housing occupancy. Combining the life cycle pattern with the population projections, demographically-based projection of future occupancy demand by structure and tenure type for the City of Nanaimo is presented. (Appendix A contains the detailed numeric output of the Urban Future's population and housing projections and has been included at the end of this document).

Reference material used in this assignment was derived from federal, provincial, and municipal sources, and from Urban Futures information system. Outputs are from Urban Futures Population and Housing Projection Models. The data and information used in the conduct of this assignment and presented in this report have been compiled from sources believed to be reliable: their accuracy, however, cannot be guaranteed.

## 2.2 THE DEMOGRAPHIC CONTEXT

Over the past two decades community issues and strategic planning have largely focused on issues of growth and growth management. While such issues will continue to be part of community concerns, they will be increasingly supplemented by issues of change and change management. The growing appreciation of the importance of change will come from the acknowledgement of the implications, for both public and private life, of an aging population. In the context of population projections, the focus will shift from projection of a total population to analysis of changes in the age composition of the population and its associated implications. As a result, the preparation and analysis of age specific population projections will be the foundation of effective planning. As much of the future change in a community's demography is rooted in the characteristics of its current population, consideration of the future is based on the analysis of the past and the present. Further, as the City is functionally part of its larger region (the area which houses the City's total labour force), influencing and being influenced by, the region's changes, it is necessary to consider the demographic trends in the region as setting the context for the City.

### 2.2.1 Historical Population Growth in the Nanaimo Region

#### Total Historic Population

The recently released data from the 2001 Census of Canada indicated that the population of the Nanaimo Regional District was 126,985 people, 58,150 more than in the 1996 Census. The 1996 to 2001 average annual growth rate of less than one percent was considerably below the average for the preceding decade, when annual growth rates were in the range of two to six percent. Having said this, the Nanaimo Regional District was the fifth fastest growing district in the province between 1996 and 2001, doing significantly better than the 16 of the province's 28 Regional Districts whose populations declined between 1996 and 2001.

#### Census Undercount

It is important to note that Census of Canada population counts do not include the total population:

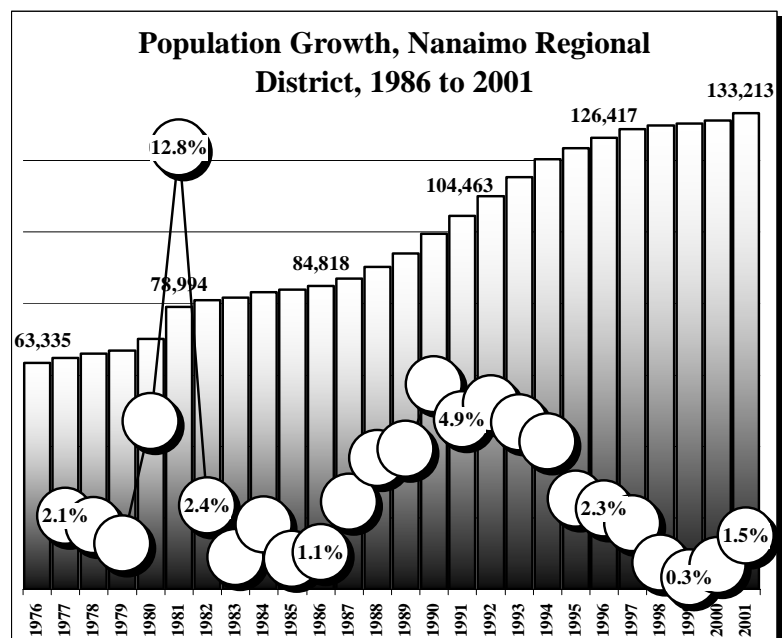


Figure 2.1



by Statistics Canada's estimates, the Census generally misses between two and three percent of the population in a community, a margin referred to as the Census Undercount. Acknowledging this, both Statistics Canada and BC Statistics prepare population estimates adjusted for the under count. Statistics Canada's Annual Demographic Statistics estimates the Nanaimo Regional District's 2001 population at 133,213 persons, while BC Statistics estimated 133,502. In more recent data analysis, BC Statistics is using 133,502 as a 2001 base for the Regional District, very close to Statistics Canada's estimate: as a result, the Statistics Canada data series is used here as the historical annual data base. As Figure 2.1 shows, population growth in the region in the post-1996 period established the record low for the past quarter century, below even the depth of the early 1980s recession. From 1976 to 2001, the Regional District's population increased by 69,878 people (110 percent), from 63,335 people in 1976 to 133,213 in 2001.

### Age Profile

The typical resident of the Regional District in 2001 was a 45 year old: there were 2,155 people of this age, more than the number of people of any other age. Of the 45 year-olds, there were 1,135 females and 1,020 males, making typical person in 1999 a 45-year-old female. When compared to the province as a whole, the Regional District has a slightly older population, with the most typical resident of the province being 41 years of age four years younger than the region district's mode of 45 years of age.

The Regional District's population profile shows the typical post war "Baby Boomer" bulge common in age profiles of most regions throughout Canada, the United States and many parts of Europe (Figure 2.2). The Baby Boom generation, born between 1947 and 1966 (age 35 to 54 in 2001), accounted for 31 percent (41,900) of Nanaimo's 133,213 residents (as compared to 33 percent of the province's population).

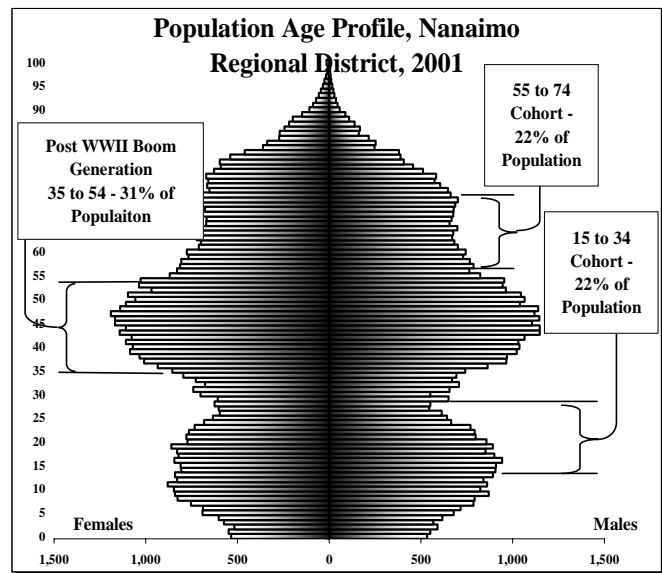


Figure 2.2

### Implications

Other than this bulge, the Regional District's age profile has little in common with that of the province as a whole, having a significantly greater share of its population in the older, and a smaller share in the younger, age groups. While the region's 55 to 74 age group (28,650 residents) accounted for 22 percent of its population, this age group was only 17 percent of the provincial population: the

11,610 people aged 75 plus made up nine percent of the region’s population, compared to the age group’s six percent share of the province’s population.

The 15 to 34 age group accounted for 22 percent of the region’s population, compared to its 27 percent share of the provincial population. A particular characteristic of the region’s age profile is the relatively small share – 15 percent – of the region’s population that was in the 20 to 34 population, compared to 21 percent of provincial population, coupled with the fact that there are more people in the kindergarten to 12 age groups than there are in the slightly older post-secondary and labour force age groups (the “waist” on Figure 2.2). This indicates the historical net outflow of people from the region after completion of high school, as young adults leave the region to pursue educational, career and life style objectives.

## 2.2.2 Historical Population Growth in the City of Nanaimo

Over the 1976 to 2001 period the City of Nanaimo grew from a population of 41,294 to 76,892, an increase of 35,598 people (86 percent, or an average annual growth rate of 2.6 percent). While impressive growth, the Regional District’s population increased faster than that of the City. As a result, the City’s share of the regional population fell from 65 percent in 1976 to 58 percent in 2001, with other communities in the region increasing their share. For example, between 1976 and 2001 Parksville’s share increased from five to eight percent (a 53 percent increase), while Qualicum’s share almost doubled from three to six percent. The share of people residing throughout the rest of the region increased from 27 to 30 percent.

Figure 2.3 illustrates the similarity between the City’s and Region’s age profiles.

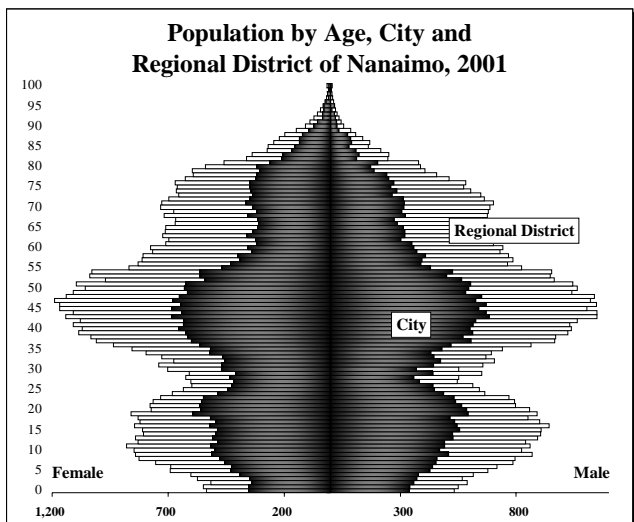


Figure 2.3

### Implications

Marked differences are seen in the working and retirement stages of the lifecycle: given the hub function the City plays for employment throughout the region, it exhibits a greater proportion of people in the working stage of the lifecycle (specifically in the population between the ages of 15 and 34, representing 25 percent of the City’s population and 22 percent of the Regional Districts’). Conversely, the Regional District has a greater proportion of people in the pre- and retirement stages of the lifecycle, with the 55 to 74 age cohorts representing 22 percent of the region’s population and 18 percent of the city’s. Although the region

also shows a greater proportion of population in the elderly age groups, the difference diminishes from that seen in the 55 to 64 (nine percent in the region versus eight in the City) as elderly individuals may move back towards the city for suitable housing and/or services.

### 2.2.3 Components of Growth and Change in the Nanaimo Region

Change in the size and age composition of a region's population is brought about by the processes of births, aging, deaths and migration into and out of the community. The difference between births and deaths is referred to as natural increase, although increasingly there is little natural about either births or deaths, and in the long run these processes will lead to decreases rather than increases in the population. The difference between in- and out-migration is referred to as net migration, and is the sum of the number of people moving to the community from other parts of the province, other provinces, and other countries and the sum of the number of people moving from this area to other parts of the province, other provinces and other countries. Two aspects of these flows are important in projecting future population: the aggregate level or size of the flow, and their age structure.

#### Birth Rates

Ultimately, the most significant demographic variable is what is variously called the birth, fertility or natality rate; this being the average number of children born to women during their lifetime. The pivotal value for this rate, called the replacement level birth rate, is slightly above an average of 2 children born per woman during her life. Above this rate, a population grows and grows younger. Below this rate, not only will the population decline but it will grow older as the decline is the result of the shrinking of the younger population.

In the 1938 to 1967 era, the birth rate in Canada was well above the replacement level, reaching an average of almost 4 children per woman in 1960. The 1960s witnessed a dramatic decline in birth rates: by the early 1970s, they had dropped below the replacement level, and have continued to decline (albeit more gradually) since then, reaching an average of 1.4 births per woman during her lifetime by 2000. There has also been a shift during this period on the timing of when women have children, with women now having children later in their lives (the median age for women giving birth to a child during a year now being 29 years of

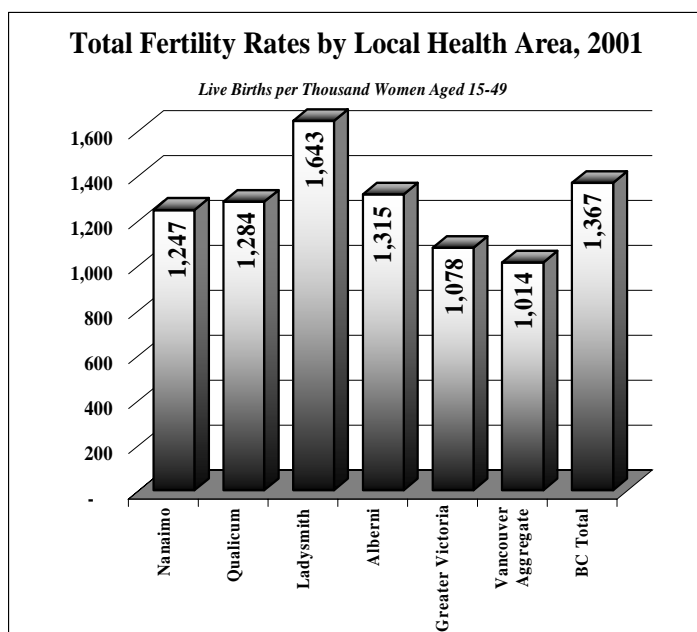


Figure 2.4

age). While the high birth rates of the late 1940s, 1950s and early 1960s created the baby boom bulge, the combination of the three subsequent decades of below the replacement level birth rates and later in the life cycle timing of births produced the tapering of the age profile in the younger age groups.

Fertility rates also demonstrate regional differences (Figure 2.4). For example, in 2001 the Nanaimo Local Health Area (which includes the City of Nanaimo and its adjacent communities, and which together with the Qualicum Local Health Area essentially makes up the Regional District) had a total fertility rate of 1,214 births per 1,000 women aged 15 to 49, similar to the situation seen in Qualicum (1,284 per 1,000), and slightly below the provincial average of 1,367. When other surrounding jurisdictions are considered, the urban character of the Nanaimo Local Health Area becomes apparent; both the Ladysmith and the Alberni LHA's had significantly higher fertility rates, 1,643 and 1,315 per 1,000 respectively. In comparison, the province's highly urbanized metropolitan region's had much lower birth rates (Victoria's rate was 1,078 births per 1000 women aged 15 to 49 and Vancouver's was 1,017).

It is important to note that all of these areas have below the replacement level birth rates (the level where mom and dad replace themselves, or 2. 1 children per woman during her lifetime) which, without net in-migration, will lead to an absolute decline in population and significant increases in the average age of the population, over the long run.

For the purposes of the projection of population in the Regional District, it has been assumed that the age specific pattern of fertility will remain at its current level below the replacement level birth rate. While this does not continue the declining trend in fatality that has prevailed in the post 1970 period, it does acknowledge that the rate of decline has generally slowed over the past decade, and that future declines will be marginal, as rates stabilize over longer projection horizons.

**Death Rates**

The second aspect of demographic change is mortality. Age specific mortality rates were also assumed to remain constant at the level that prevails today. Once again, while mortality rates have declined substantially over the past fifty years, and further declines will certainly occur, it is necessary to acknowledge that these declines will inevitably be subject to the laws of

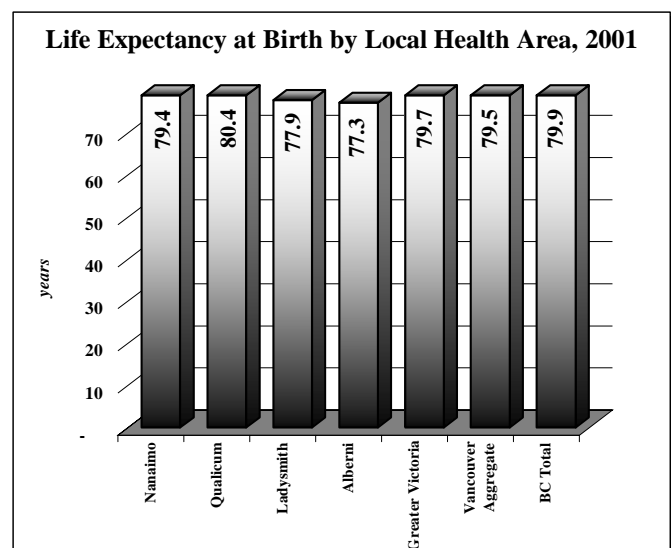


Figure 2.5

diminishing returns, with each additional decline requiring increasing levels of medical and health resources.

Note that there is much less variance in life expectancy (the mirror of mortality rates) across regions (Figure 2.5) than there is in birth rates (Figure 2.4). This is a reflection of the relatively uniform levels of public health and health care delivery in the province. It is only at the very local level that wider differences would be observed.

### Net Migration

The third component of demographic growth and change is net migration to the region. Net migration is comprised of people moving to and from other regions in the province (net intra-provincial migration), people moving to and from other provinces (net inter-provincial) and those moving between Canada and other countries (net immigration). In projecting the future level and composition of each of the individual migration flows to the Regional District, a 10 year historical migration trend to the region was used to represent both the high growth period experienced in the early 1990's and the more recent lows of the late 1990s. In terms of the age composition of this net flow, the average of the past decade has also been assumed to be reflective of the age composition of people moving to the district over the projection period.

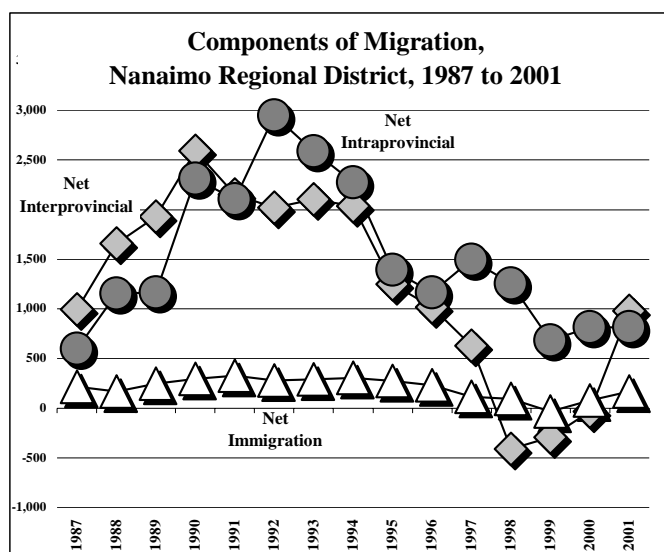


Figure 2.6

Figure 2.6 shows the magnitude of the three net migration flows into and out of the Nanaimo Regional District between 1987 and 2001. Over this period the linkage between net intra-provincial migration and economic conditions is clearly shown with high migration to the region during the 1989 to 1995 period while the province's economy was relatively strong, followed by slowing intra-provincial migration as the economy stalled in the post-1996 period. Over this period net intra-provincial migration to the Regional District ranged between a peak of 2,948 in 1992 and a low of 692 in 1999.

Net inter-provincial migration followed a similar pattern, achieving relatively high levels in the 1989 to 1994 period and then declining sharply, to the point that from 1998 to 2000, more people left the region for other provinces in Canada than

came to the region from other provinces. The preliminary data indicate that this pattern has reversed, with positive net inter provincial migration during 2001. Net immigration is not a significant component of migration to the Regional District: what there is generally follows the pattern at the provincial level.

### 2.2.4 Future Growth and Change in the Nanaimo Region, 2001 to 2031

Combining assumptions about natality, mortality and migration together with the region’s current population results in a projection of the Nanaimo Regional District’s population growing from its current 133,213 residents to 218,083 by 2031 (Figure 2.7). This addition of just over 84,870 new residents to the region’s population (63.7 percent growth) would involve adding an average of 2,800 people each year. Annual growth rates would increase from the recent one percent increase to the range of two percent by 2020 and then decline slowly to the 1.4 percent range by 2031.

This low to moderate growth trend is in contrast to the relatively high growth experienced in the

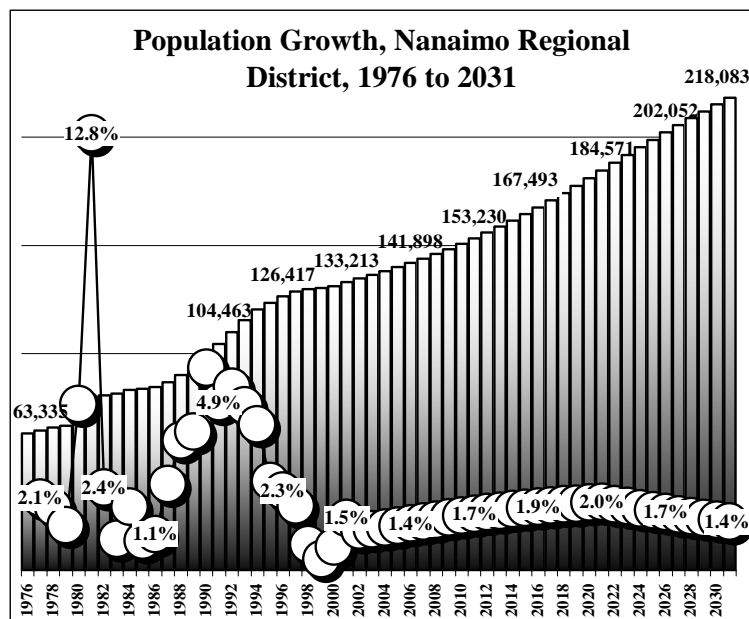


Figure 2.7

Regional District over the past two and a half decades: external factors, both past and future, are the reason for this long run change. Over the past 15 years, recessions, economic change and administrative restructuring in Alberta and Ontario pushed people (labour force migrants, families and retirees) towards a robust economy in British Columbia. At the same time the province grew rapidly as a result of international pull factors such as the “Asian Tiger” economic boom, political uncertainty in Hong Kong and Taiwan and changes in federal immigration regulations in Canada.

Combined, these factors resulted in record levels of migration to the province. With their administrative and economic restructuring essentially complete, the push from BC’s 1990s sources of domestic migration (Alberta and Ontario) is not likely to be experienced again. As has been seen more recently, these two provinces are likely to continue to pull people from other provinces.

As indicated earlier, the most recent published projection from BC Statistics (PEOPLE 27) is closer to Statistics Canada's estimates for the regional population, being only 289 people different in 2001. From this point forward BC Statistics projects the region to grow to 157,496 by 2011, 189,557 by 2021 and 216,264 people by 2031. By the end of the projection period the difference between the BC Statistics and Urban Futures projections are roughly 1,800 people. In both the base and final projection year, there is less than one percent difference between the each projection. This is considered insignificant over the 30 year projection period. It should also be noted that the rapid growth seen in 1981 (12.8 percent) is from BC Statistics database and, given data availability can not be verified with estimates from Statistics Canada.

It is a fundamental demographic fact that Canada's population growth is entirely dependant on immigration: with the aging of Canada's population, and it's below the replacement level birth rate, its population would stop growing in the short run and decline in the long run, without immigration. Other countries such the United States and many parts of Europe share the same demographic challenges of a significantly aging population. These challenges will result in an increasing degree of competition between these countries for young skilled labour force participants. Regardless of targets established by the Federal Government, without explicit consideration of both this competition and the entry hurdles established by current regulations, the targets will be increasingly difficult to achieve. As a result, Canada will not experience significant population growth: in this context, few regions' can anticipate sufficient levels of migration to achieve the levels of growth they did in the late 1980s and early 1990s.

### 2.2.5 Population Change in the Regional District

Aging of the region's current population and below the replacement birth rates will bring much greater change to the region's population than indicated by its overall growth. Figure 2.8 shows the upward shift that will occur in the age profile of the region's population as a result of the aging of its current 133,213 residents. Births and the net inward migration of an overwhelmingly young population will fill, and expand (albeit only slightly), the base of the age profile. Even with the relatively large elderly population currently in the region, given the large cohort that will age into these age groups over the coming decades and the age profile of the projected net migration flows, the widening

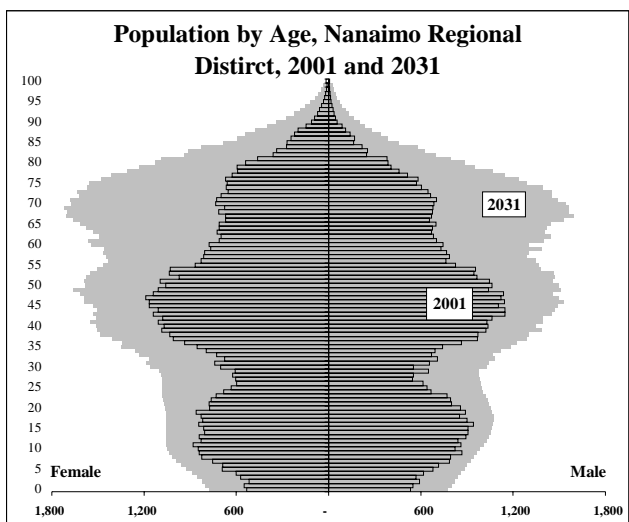


Figure 2.8

of the top of the age profile will be much greater than that of the base.

### Implications

The 65 to 79 age group will experience the greatest absolute growth, increasing by 25,039 people (130 percent growth) over the next 30 years (Figure 2.9). The greatest relative increase will be in the 80 plus age group: its 159 percent over this period will be the result of the leading edge of the baby boom generation reaching this group by 2030. The 50 to 64 age group will also experience rapid growth, adding 18,521 people (73 percent growth). Collectively, these three age groups will account for 62 percent of total population growth anticipated in the Regional District over the next three decades.

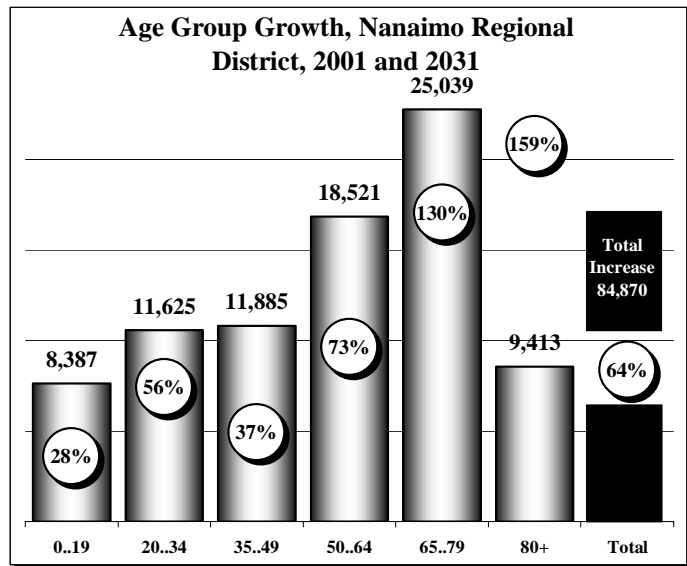


Figure 2.9

Comparatively, each of the cohorts under the age of 50 will grow slower than total population, increasing by between 28 and 56 percent, adding 8,387 to 11,885 new residents over the next 30 years. These age groups will account for 38 percent of future growth in the District.

In conclusion, growth and change in the Nanaimo Regional District over the coming three decades will be characterized by a moderate total growth with rapid and significant aging of its population. Over the next three decades the most typical person will go from today's 45 year old to being a 69 year old in 2031. The aging of the region's population will result in significant planning opportunities and challenges ranging from the level of public involvement in planning issues, to longer crosswalk lights and providing social services to an aging population.

### 2.2.6 Future Growth and Change in the City of Nanaimo, 2001 to 2031

The first step in the projection of population growth and change in the City of Nanaimo has been to project growth and change in the functional economic region, the Nanaimo Regional District, within which the City plays both a part and a core. The regional economy (including its retirement and recreational components) will determine the levels of in- and out-migration to the region, which, with the region's birth and death rates, will determine the future size and composition of population in the region. Land use and transportation will determine the distribution of the population within this functional region.



Thus the second step in the projection of population growth and change in the City of Nanaimo is to determine how the growth and change of the region will be allocated in the region. Allocation of growth and change will ultimately depend upon the Land Use Plans of the City and the other communities, and hence will be in part a product of the Official Community Plan. As an assessment of Plan policies is the reason for this research growth determined by OCP Policies cannot be an input to it: as a result, an alternative approach was necessary. Within this context, a step-down comparison model to determine the components of demographic change (natality and mortality rates and net migration) was employed to prepare the baseline population projection for the City of Nanaimo.

### **Birth and Death Rates**

Upon examining the difference between vital events (birth and deaths) for the City and the Regional District, it was determined that there was a general consistency between both natality and mortality rates at the regional and City levels. For example, according to the BC Vital Statistics Agency in 2000 there were 955 births recorded in the Nanaimo Regional District. Of these births, approximately 616 (65 percent) occurred in the City of Nanaimo. In modeling the number of births in the region and City, the projected number of births in the base projection year (2001) was 975 in the region, 650 (66 percent) of which occurred in the City. Although differences in rates are evident within the region (as was illustrated in Figure 2.4), the City of Nanaimo and surrounding urban communities form such a large proportion of the region that differences in rates are not evident until smaller rural areas in the district are considered.

Given the similarity in underlying birth rates between the City and the Region, it was assumed that the age specific pattern of births was consistent between what was experienced in the region and the City. A similar consistency was seen with age specific mortality rates, and the pattern of mortality by age was also assumed to be represented by the experience at the regional level.

### **Net Migration**

In modeling the future net migration flow to the City, it was necessary to determine the number of future migrants and the age characteristics of this flow. Their magnitude was estimated by comparing the age profile of the 2001 populations of both City and Region to their 1996 profiles aged by 5 years (e.g., comparing the number of 11 year olds in the City in 2001 to the number of 6 year olds in the City in 1996). Adjusted for births and deaths, these net differences provide a profile for net migration for both geographies, and hence the ability to calculate the City's share of the Region's net migration. This share of total migrants by age (ranging from negative in the 29 to 35 age groups where the City lost people while the Regional District gained, to positive in the younger and older age groups where changes in both the City and the Region moved in the same direction)

was applied to the total migration stream projected at the regional level to derive the total number of net migrants to the City by age.

Once again combining the assumptions about fertility and mortality rates and a constant age specific share of net migration to the City into a cohort survival population projection model results in annual projections of the City's population. This projection shows the City's population growing from its 2001 population of 76,892 residents to 113,954 by 2031 (Figure 2.10). The addition of 37,062 new residents to the region's population (48 percent growth) would involve adding an average of 1,235 people to the City's population each year. Annual growth rates would increase from the recent .06 percent range to 1.2 percent by the end of this decade, to the 1.6 percent range by 2020 before leveling off at the 1.3 percent range by the end of the projection period.

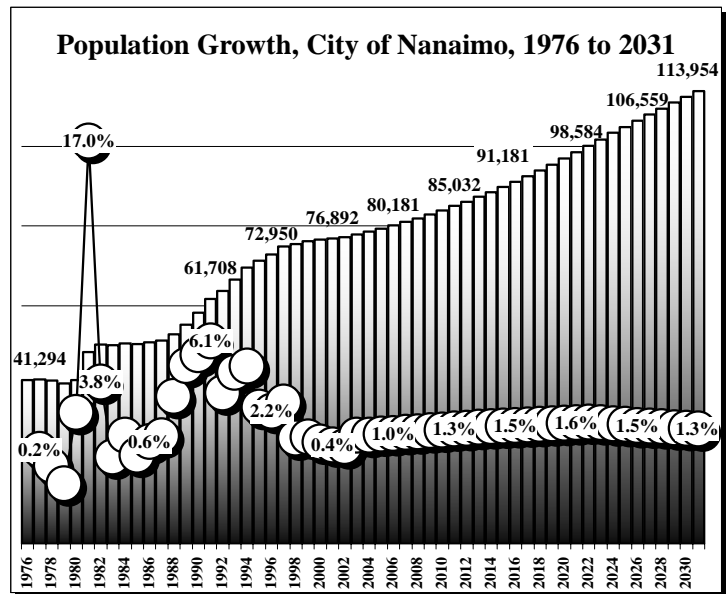


Figure 2.10

### 2.2.7 Changes in the Characteristics of the City's Population

As at the regional level, aging of the City's population will bring much greater change than is indicated by overall growth. Migration and aging of its current residents will ensure that the 50 and older population in the City will increase significantly in the future, while migration and the births to migrants will increase the size of the under 40 population (Figure 2.11).

The aging process is represented in the 65 to 79 age group having the greatest relative growth, increasing 2.45 times (a 145 percent increase, or 13,295 people) over the next three decades, compared to the 48 percent increase for the total population of the City (Figure 2.12). The 50 to 64 and 80 plus age groups will also grow faster than total population over the projection period, each growing by 61 percent

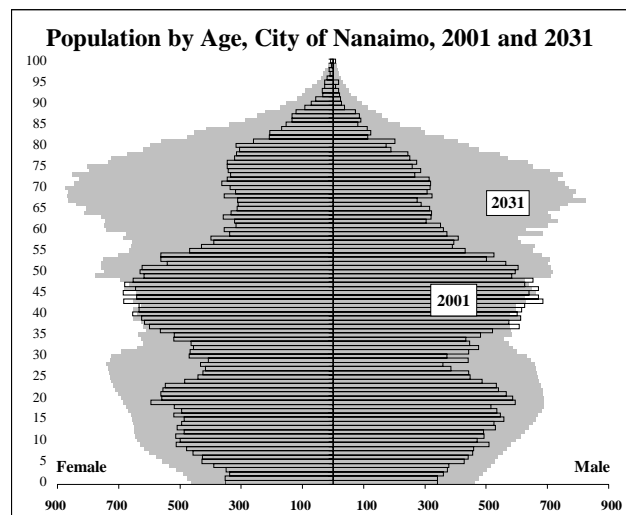


Figure 2.11

(7,976 people) and 125 percent (4,158 people) respectively.

Each of the cohorts under the age of 50 will grow slower than total population: the 0 to 19 group would grow by 28 percent, the 20 to 34 by 42 percent and the 35 to 49 only marginally by two percent. Each of these groups will only grow by between 424 and 5,999 people over this three decade period.

### Implications

Following patterns at the regional level, growth and change in the City will also be characterized by a rapid and significant aging of its resident population. Over the next three decades the most typical person in the City is projected to go from being 43 years of age to 67 in 2031.

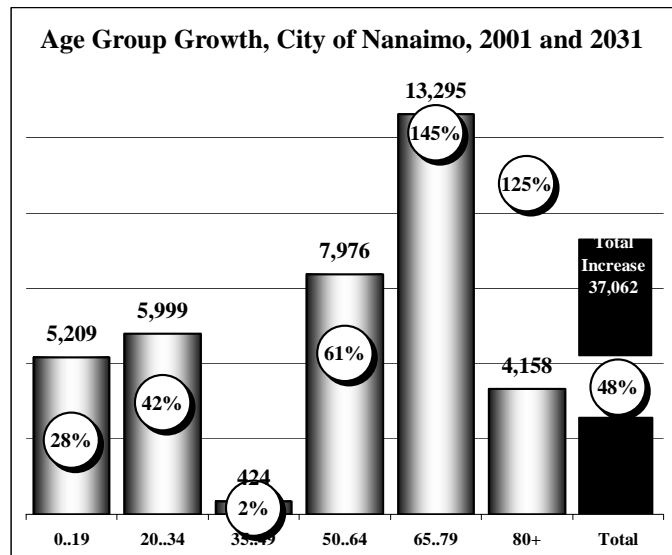


Figure 2.12

An increase in the City’s population over the age of 65 that is almost three times greater than total population and almost five times greater than the population under the age of 65 will have profound implications on community planning issues within the City. From the number and form of housing units that must be added to the City’s housing stock to the day-to-day operations in transit services, curbside garbage pickup and recreational centres, issues of catering to an aging population, while recognizing the needs of younger generations, will come to the forefront of many planning agendas.

## 2.3 HOUSING IN THE CITY OF NANAIMO, 2001 TO 2031

### 2.3.1 The Lifecycle Pattern of Private Housing in the City of Nanaimo

#### Household Maintainer Rates

In the Census questionnaire, used to gather data on housing, each household is (or group of people living together in a dwelling unit), asked to provide information on the age and other attributes of the person who is primarily responsible for financial support of the household. This person is defined as the primary household maintainer. The percentage of people in the community who are defined as household maintainers is referred to as the crude household maintainer rate.

### **Age Specific Factor**

There are a number of elaborations that can be made to the crude household maintainer rates in utilizing them in housing demand projections. For example, as children are not household maintainers but are in the total population, the crude household maintainer rate under-emphasizes the propensity to be household maintainers, as it calculates a rate on a base of a population that is ineligible to be included in the numerator. A necessary refinement is to calculate the percentage of people in an age group who are household maintainers, or an age specific household maintainer rate. As is shown in the next section of this report, there is a very strong correlation between age and age specific household maintainer rates, a relationship that is referred to as the life cycle of housing occupancy.

### **Tenure Specific Factor**

Another elaboration to household maintainer rates is to make them specific to the type of housing unit that the household occupies. As Census data are the main source of information about housing occupancy, the definitions of housing used by Statistics Canada are employed throughout this analysis. The basic concept of housing is that everyone (except the homeless) lives in a dwelling, defined as a space that encloses their living quarters (essentially the space in which a person most regularly eats, sleeps and uses a bathroom). A private dwelling is defined by Statistics Canada as “a separate set of living quarters with a private entrance either from outside or from a common hall, lobby, vestibule or stairway inside the building. The entrance to the dwelling must be one that can be used without passing through the living quarters of someone else.”

Private dwellings include those that are occupied by tenants or by their owners (fee simple, strata and co-operative ownership, including housing on leased land and band housing in First Nations’ communities). Adding this dimension of housing gives rise to age and tenure specific household maintainer rates, the percentage of people in an age group who maintain households in rental or owner occupancy housing.

### **Structure Specific Factor**

A final permutation of maintainer rates is to consider them by structure type. Private dwellings are aggregated into single detached houses (a single dwelling unit in a single structure), attached ground oriented dwellings (semi-detached and side by side duplex houses, row houses, dwellings attached to non-residential structures, mobile homes and other moveable dwellings) and apartments (dwellings in multi-unit low- and high-rise buildings). Note that units defined as “apartments and suites in detached houses” are included here in the attached ground oriented category based on their overall structural character (in houses); they are sometimes included in the apartment category based on their specific character (as suites in multi-dwelling structures). Adding the structure type dimension

of housing gives rise to age, tenure and structure type specific private household maintainer rates used in this report.

### Implications

The following sections present the age specific lifecycle patterns of maintainer and occupancy rates for both private and collective dwellings for the City of Nanaimo from the 1996 Census data. A review of these propensities shows that, as there is a distinct age related pattern of housing occupancy for each of the major types of dwellings, the projected aging of the City's population will have profound implications for both the demand for, and the occupancy of, housing in the community over the next three decades.

### 2.3.2 The Lifecycle Pattern of Private Housing Maintainer Rates

Figure 2.13 shows the strong age correlated pattern of household maintainer rates in the City. This pattern is similar to that which prevails in every urban region throughout North America, with low maintainer rates in the young adult stage of the lifecycle, followed by significant increases in propensities as people age in to the family formation stage of the lifecycle.

The Census shows that people under the age of 15 are not household maintainers, as they live with parents or guardians who are the household maintainers. Many, but not all, of the 15 to 19 year olds also live in households maintained by someone else. However, four out of every 100 people aged 15 to 19 in the City of Nanaimo are primarily responsible for the financial support of a household, and hence the household maintainer rate for this age group is four percent.

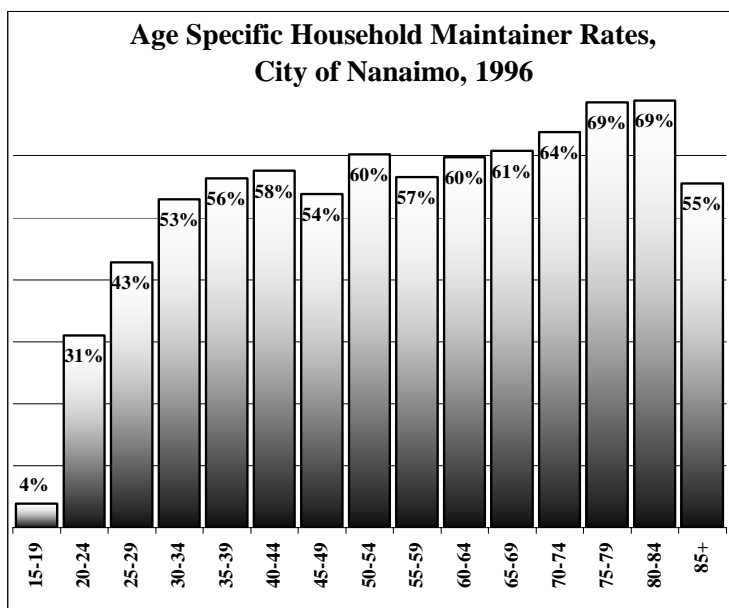


Figure 2.13

Once the age of 20 is reached, household maintainer rates increase significantly when young adults begin to move out of the parental home for education or career paths. Many more of the 20 to 24 year olds become household maintainers, with 31 percent of the people in this age group in the City having this responsibility; over seven times the maintainer rate of the 15 to 19 age group. The rate increases

significantly again as the 25 to 29 age group is reached, with 43 percent of individuals in this age group being household maintainers.

Although maintainer rates continue to increase with age, increases are not nearly as dramatic in the 30 plus age groups. For example, in the 30 to 34 age group, 53 percent of the people are household maintainers, while 61 percent of the people in the 65 to 69 age group are considered maintainers. The pattern of increasing maintainer rates over the lifecycle peaks in the 75 to 79 and 80 to 84 age groups where 69 percent of individuals are household maintainers. From this peak, rates decline slightly, returning to 55 percent in the oldest (85 plus) age group as the proportion of people living in private housing falls (the result of a shift towards collective dwelling such as seniors' homes and care residences).

### Implications

The pattern of age specific household maintainer rates, with their highest levels being attained in the later years of the life cycle, means that with an aging population, the number of households in the region will increase faster than the population.

### 2.3.3 Maintainer Rates by Tenure and Structure

The age specific propensity to maintain ground oriented owner occupied dwellings dominates the lifecycle of housing occupancy in the City of Nanaimo (Figure 2.14). Propensities to maintain households living in other tenure and structure type combinations form around this core propensity, with the rental ground oriented and apartment formats exhibiting strength in the younger (under 35) age groups and rental and owner-occupied apartments in the older (over 75) stage of the lifecycle.

Household maintainer rates for owner occupied ground oriented accommodation increases from under two percent in the under 25 population (where maintainer rates of two to 14 percent are seen for apartment rental units) to 43 percent in the 50 to 54 age group, peaking at 48 percent in the 70 to 79 group. From this point, ground oriented owner occupied rates decline (to the 34 percent seen in the 85 plus age group), with significant increases in maintainer rates for both

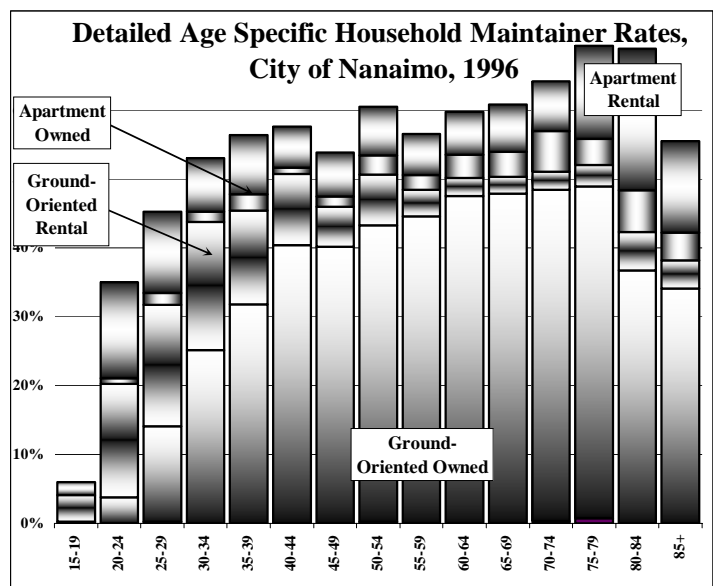


Figure 2.14

rental and owner-occupier apartment accommodation. From the 50 to 54 age group on, apartment rental maintainer rates triple from seven to 21 percent, and ownership apartment rates double from two to four percent. By comparison, over this portion of the lifecycle, maintainer rates for ground oriented rental accommodation decline from seven to three percent, from highs of 18 percent in the 30 to 34 age group.

### **Implications**

The current picture of maintainer rates shows relatively high rental apartment maintainer rates in the young adult, student and senior adult stages of the lifecycle. High propensities in the younger age groups are reflective of both the mobility sought by, and required of, this stage of the lifecycle and the relatively low level of capital resources available to younger adults.

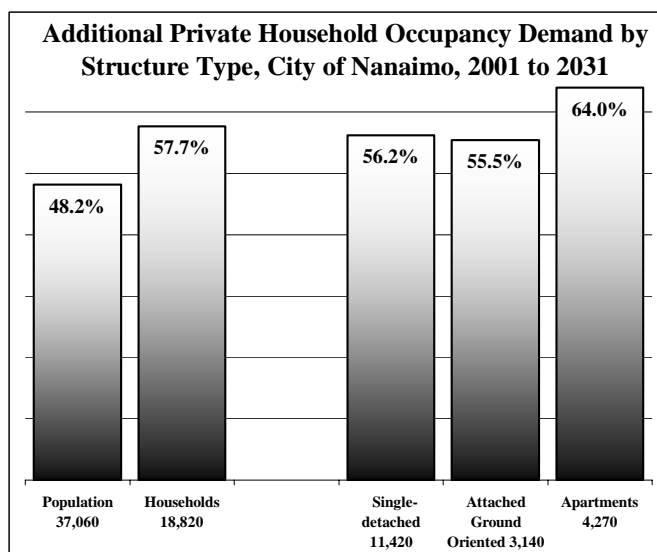
In the case of the older age groups, maintainer rates still show a predisposition to ground oriented accommodation. This pattern starts early in the lifecycle and holds for the balance of the age cohorts; only in the youngest and oldest age groups do rates for apartments rival those for ground oriented units. Associated with this strong connection with being close to the ground are issues of security of tenure, with the vast majority of people moving towards owner occupancy over the lifecycle.

### **2.3.4 Changing Household Demand in the Future**

In projections of the future of housing occupancy demand, age specific maintainer rates are used together with the population projection to produce estimates of the number of occupied households in the City by age, tenure and major structure type. In this, and other occupancy based projections, maintainer rates are generally held constant at the most recent observed values. [The 2001 release date for the detailed dwellings data from Statistics Canada is October 22. Although the general pattern is not expected to change dramatically, a review of the data will be completed once made available.] Holding private household maintainer rates constant over the projection period focuses the analysis on the impact that demographic change will have on housing occupancy demand, rather than on how these rates will change over time. While it is certain that these rates will change over time, this analysis provides a baseline of future occupancy demand given changes in the population's underlying demography. Having said this, the magnitude of future changes in maintainer and occupancy rates will be marginal, with slight changes over the past decades providing ample evidence.

## Implications

The result of combining the age specific population projections and the private household maintainer rates is a projection for the City housing market where, as anticipated from the pattern of maintainer rates and the aging of the region's population, net occupancy demand for housing will increase faster than total population (Figure 2.15). Over the next 30 years, there will be a net increase of 18,620 occupied private dwelling units, a 57.7 percent increase, to accommodate the 37,060 projected increase in population (a 48.2 percent increase).



**Figure 2.15**

Figure 2.15 also shows that, although the rate of growth will be faster for apartment units, the absolute number of single detached units will far outweigh the other structure types; the 56.2 percent increase in single detached units will be lower than the 64.0 percent growth in apartments, but the 11,420 single detached units will be double the additions for other structure types (3,140 attached and 4,270 apartment units).

This growth in demand will largely be driven by rapid growth in the 50 plus population where maintainer rates for ground oriented accommodation predominate. The leading edge of the baby boom moving in to the older age groups where apartment maintainer rates begin to increase will lead to growth in the apartment sector towards the end of the projection period, which is projected to grow by 64.0 percent or 4,270 additional occupied units.

In terms of tenure, the aging and growth of the City's population will result in additional occupancy demand being predominated by owner occupancy; between 2001 and 2031: there will be a net increase in demand of 62.7 percent for owner occupied units and 47.6 percent for rental accommodation (Figure 2.16). The largest relative increase in owner occupancy demand will be seen in the apartment segment of the market, growing by 80.4 percent over the next 30 years or 1,130 units. The greatest absolute increase will be seen in owner occupied single detached segment of the market where net occupancy demand is projected to grow by 10,590 units or 59.0 percent. Over this period owner occupied attached ground oriented homes (such as row homes) will see net occupancy demand grow by 79.7 percent or 1,940 units.



The largest relative and absolute increase in rental occupancy demand will be seen in apartments (59.7 percent or 3,140 units). Growth in occupancy demand for single detached, other attached ground oriented and apartment units will be 35.1, 37.2 and 59.7 percent respectively as each adds 830, 1,200 and 3,140 units respectively.

This demographically based projection of growth in housing demand shows a relatively steady pattern of annual increases in occupancy demand, with between 390 and 750 additional occupied dwellings demanded per annum. Smaller increases at the beginning of the projection period will be the result of slower population growth in the age groups with high maintainer rates (Figure 2.17). The most substantial increases in demand will be seen in the 2010 to 2025 period when the bulk of the baby boom generation ages through the high household maintainer stage of the lifecycle.

Over the next 30 years additional occupied housing demand will be dominated by ground oriented units. Annual net additional occupancy demand for single detached units is projected to grow from 260 to 450 single detached units. Attached ground oriented units will see net annual occupancy additions in the range of 50 to 130 units. Additions to occupancy demand for apartments would be between 80 and 200 units each year over the next three decades.

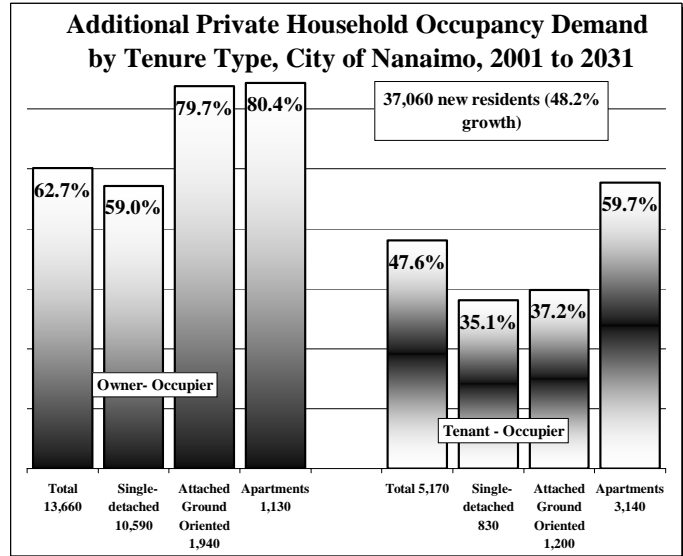


Figure 2.16

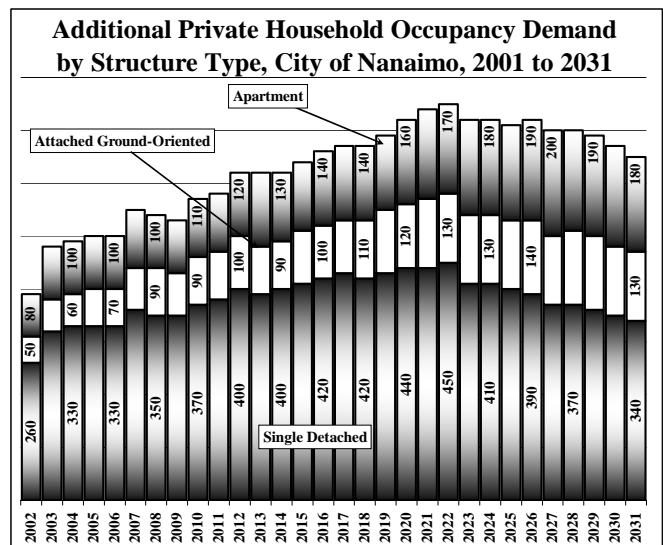


Figure 2.17

## **2.4 PROJECTION OF INSTITUTIONAL USES**

### **2.4.1 Population in Collective Dwellings**

In Canada the vast majority (approximately 95 percent) of seniors aged 55 plus live in private dwellings. This section focuses on the other five percent, those over the age of 55 residing in collective type accommodation such as care homes and seniors residences (here after referred to as collective dwellings). The question asked here is: “how many people over the age of 55 will be living collective dwellings in the City of Nanaimo over the next 30 years?”

Data from the 1996 Census on the population living in collective dwellings was tabulated by detailed structure type and applied to the overall population by age group for the province of British Columbia. The result is a measurement of the age specific propensity for individuals to live in collective dwellings to be calculated. Applying these propensities to the age specific population projection for the City of Nanaimo provides estimates of the future number of individuals living in collective type dwellings. This projection assumes the 1996 headship rates for the province of British Columbia are representative of the situation that is seen in Nanaimo and that this will remain constant over the projection period.

The types of collective dwellings outlined by Statistics Canada on the Census Survey include institutional collective, service collective and communal dwellings. Institutional collective dwellings include hospital and related institutions (care homes and residences for the elderly and chronically ill), group homes and orphanages, and correctional and penal institutions. The major categories in service collective dwellings include motels, hotels and tourist accommodation, lodging and rooming houses and other service commercial dwellings. The major categories of communal and other non-institutional collective dwellings include religious establishments, work camps, military camps, and Hutterite colonies.

Like private dwellings, the propensity for people to reside in collective dwellings shows a distinct pattern when defined by age. For example, the rates for seniors living in care homes and seniors residences increases from a low of 0.25% of the population in the 55 to 64 age group to 10.1% in the 75 plus age group (Figure 2.1). The increase in the rate of individuals living in this form of dwelling increases by 40 times between these two age groups. . Although only tabulated for the 75 plus age group at the provincial level, national data show this trend continuing past the age of 75, with the probability that an individual will move towards institutional type accommodation continuing to increase along with age.

The impact of demographic growth and change in the City of Nanaimo over the coming three decades would result in the number of people residing in collective dwellings growing faster than total population: the age composition of the 46 percent projected growth in the City’s population

would result in a 120 percent increase in the number of people residing in collective dwellings. Growth in the number of people in collective dwellings will be driven by the projected rapid increase in the population over the age of 55 (118 percent).

The greatest relative growth will be seen in hospitals and care and seniors residences, each growing by 120 percent over the next 30 years. The greatest absolute growth will be in residents in care and seniors residences which is projected to increase by almost 850 residents over this period. It is important to once again note that the vast majority of seniors reside in private dwellings, as evidenced by the 23,500 person growth in the 55 plus population versus the 937 person growth in residents of collective dwellings. Although growing rapidly over the projection period (at over 2.5 times that of total population), the majority of growth, and hence change in land uses, will result from net additions to the private sector of the housing market within the City of Nanaimo.

At this point it is pertinent to note the driver behind growth in the senior's population in Nanaimo over the coming two decades. Figure 2.3 shows that between 2001 and 2021 the 60 to 79 population is projected to more than double, growing by 13,275 residents. The City has become renowned as a significant retirement destination in the province. This has led to the common perception that growth in the senior's population in the future will largely be driven by migration to the region. In reality most of the growth will be home grown: if all the 21,175 residents between the ages of 40 and 59 in 2001 are assumed to remain in the city in 2021 they would account for 82 percent of the 25,795 persons 60 to 79 in 2021 (Figure 2.3). Therefore, issues related to growth in the seniors population in the city will largely be driven by the aging of existing residents into the retirement stages of the lifecycle and supplemented by the migration of residents from snowier climates.

#### **2.4.2 School Enrolment**

This section focuses on elementary and secondary school enrolment for the population under the age of 24 in the City of Nanaimo. The question asked here is: “how many people under the age of 24 will be enrolled in elementary and secondary schools in the City of Nanaimo over the next 30 years?”

#### **2.4.3 Methodology**

Data from Statistics Canada outlining the percentage of full-time elementary and secondary school enrolment was applied to the population projection for the City of Nanaimo to establish a baseline number for elementary or secondary enrolment by age. As the capture rates for elementary and secondary schooling is relatively constant both temporally and geographically (with enrolment being relatively mandatory), this projection assumes the 1996 rates for the province of British Columbia are representative of situation that is seen in Nanaimo. It has also been assumed that these rates will remain relatively constant over the projection period.

The full-time elementary and secondary capture rates include students enrolled in public, private and federal schools and schools for the visually and hearing impaired. While it would have been possible to employ a similar methodology to estimate postsecondary enrolment, the education function that the City of Nanaimo plays for a large portion of Vancouver Island would result in far greater capture rates than that seen at the provincial level (for which data were available). Further research in to the extent to which Nanaimo attracts students from the island and other jurisdictions within BC and Canada would be warranted to provide a reasonable estimate of post-secondary enrolment within the City.

Relating the full-time elementary and secondary school capture rates to the population projection shows that population growth and change in the City will lead to approximately 3,212 additional elementary and secondary school positions within the City over the next three decades. The age breakdown shows the greatest relative growth being in the 18 year old age group (32 percent) and the smallest relative increase in the 19 year old age group. In absolute terms, significant growth will be seen in the 15, 16 and 17 year old age groups (771 additional students). The 7 to 14 groups is expected to grow by 2002 enrolled students over the projection period (unfortunately disaggregation to single years of age is not possible due to Statistics Canada's base data).

#### **2.4.4 Census Boundary Changes**

Two boundary changes from the Census were identified: Qualicum experienced a boundary between the 1996 and 2001 Census periods, and Parksville had a boundary change between 1981 and 1986. As such, boundary changes allow only historical comparisons between the City of Nanaimo and the rest of the Regional District (including Qualicum, Parksville and the rural areas though the rest of the District).

Therefore, over the 1976 to 2001 period the City of Nanaimo grew from a Census population of 41,294 to 76,892, an increase of 35,598 people (86 percent, or an average annual growth rate of 2.6 percent). While impressive growth, the Regional District's population increased faster than that of the City. As a result, the City's share of the regional population fell from 65 percent in 1976 to 58 percent in 2001, with other communities throughout the rest of the Regional District increasing their share. For example, between 1976 and 2001 the rest of the Regional District (net of the City of Nanaimo) grew in share from 35 to 43 percent, while the City declined from 65 to 58 percent.

## **2.5 SUMMARY AND STRATEGIC CONSIDERATIONS**

### **2.5.1 Regional District Population Growth**

Over the next three decades the Nanaimo Regional District's population is projected to grow from 133,213 to 218,083 residents by 2031. This addition of just over 84,870 new residents to the region's population (63.7 percent growth) would involve adding an average of 2,800 people to the region each year. Annual growth rates would increase from the recent one percent increase to the range of 2.0 percent by 2020 and then decline slowly to the 1.4 percent range by 2031. This moderate growth in the Regional District over the coming three decades will be characterized by a rapid and significant aging of its population. Of this projected total increase in population, the 65 plus population will account for over 40 percent of future growth.

### **2.5.2 City of Nanaimo Population Growth**

The City of Nanaimo is projected to grow from its current population of 76,892 residents to 113,954 by 2031. The addition of 37,062 new residents to the City's population (48 percent growth) would involve adding an average of 1,235 people to the region each year. Annual growth rates would increase from the under one percent experienced recently, to 1.2 percent by the end of this decade, to the 1.6 percent range by 2020 before levelling off around 1.3 percent by the end of the projection period.

### **2.5.3 Age Group Profile**

The 65 to 79 age group having the greatest relative growth, increasing by 2.5 times (a 145 percent increase, or 13,295 people) over the next three decades is indicative of a rapidly aging population at the City level (this growth rate compares to a 64 percent increase for the total population). The 50 to 64 and 80 plus age groups will also grow faster than total population over the projection period, each growing by 61 and 125 percent respectively.

### **2.5.4 Household Maintainer**

Rapid growth in the older age groups will combine with high household maintainer rates in these age groups to cause housing occupancy demand to increase faster than total population over the projection period. Over the next 30 years, there will be a net increase of 18,820 occupied private dwelling units, a 57.7 percent increase, to accommodate the 37,060 projected increase in population (a 48.2 percent increase).

### **2.5.5 Housing Type**

Growth in occupancy demand will largely be driven by rapid growth in the 50 plus population where maintainer rates for ground oriented accommodation predominate: although the 55.7 percent increase in ground oriented units is lower than the 64.0 percent growth projected for apartments, the net addition of 11,420 ground oriented units is over one and a half times the additions for other structure types (7,410 total units).

### **2.5.6 Housing Tenure**

In terms of tenure, the aging of the City's population will result in additional occupancy demand being weighted towards owner occupancy. There will be a net increase in demand of 62.7 percent for owner occupied units and 47.6 percent for rental accommodation. This will lead to net additional occupancy demand for 13,660 owner occupied units and 5,170 tenant occupied units.

### **2.5.7 Strategic Considerations**

This assessment of how population growth and change will influence the magnitude and nature of housing development within the City illustrates the degree to which population change, and not merely growth, will be an influential factor in planning issues in the City over the coming decades. For example, Figure 2.18 shows the difference between total housing occupancy demand generated by the projected future population in the City (the trend projection) and housing occupancy demand generated by those who are residents today and their children (i.e., a no migration or natural increase scenario). Over the next decade, 90 percent of total occupancy demand will be generated by the housing needs of today's population or their children. Over longer projection periods, the vast majority of future housing occupancy demand will be generated by people who were either resident in City today or born to these families; even in 2031, 65 percent of total housing occupancy demand would be generated by this home grown (and aged) population.

Clearly, planning issues and challenges of tomorrow will not be those of yesterday. Concerns with the effective containment and management of growth will become included in the broader and more fundamental issues of the effective management of change; in providing the required infrastructure and services for a rapidly aging population while identifying and acknowledging the needs of the younger population in the City, and the City's need to attract and retain a younger workforce to provide the services the community requires. With a projected 48 percent increase in population over the coming three decades, physical and social infrastructure in the City, be it housing, roads, youth or seniors programs, will certainly need to expand. With over 40 percent of this growth projected to be in the over 65 population, the acknowledgement of change will need to be made in their effective and efficient delivery.

## 3.0 Commercial Development Review

### 3.1 INTRODUCTION

As part of the assessment of growth centres, Urbanics Consultants Ltd. was retained to examine historical development trends, particularly insofar as they relate to retail and office land uses. On the basis of ongoing trends, particularly related to employment and demographics, Urbanics was also retained to forecast the City of Nanaimo's future needs for retail and commercial office land uses.

Section 3.0 represents a summary review of the above-noted issues and is organized in two major sub-sections: a review of historical (and current) development trends (3.2), and a forecast of future retail and office land use requirements (3.3).

### 3.2 HISTORICAL DEVELOPMENT TRENDS

Population growth patterns have direct bearing on the rate and distribution of commercial development. Considerable variations in the rate of population growth within the Regional District of Nanaimo (hereafter RDN) over the last twenty-year period have yielded distinct patterns in commercial development.

Over the last five Census periods, population growth within the RDN has been as follows:

**Table 3.1**  
**Population Growth Patterns, 1981 - 2001**  
**Regional District of Nanaimo**

Period	Average Annual Growth	Population (End of Period)
1981 to 1986	1.4%	84,818
1986 to 1991	4.3%	104,463
1991 to 1996	3.9%	126,417
1996 to 2001	1.1%	133,213

*Source: Statistics Canada. Census Canada.*

Within the City of Nanaimo, population growth has been as follows:

**Table 3.2**  
**Population Growth Patterns, 1981 - 2001**  
**City of Nanaimo**

Period	Average Annual Growth	Population (End of Period)
1981 to 1986	0.8%	49,029
1986 to 1991	4.2%	60,129
1991 to 1996	3.1%	70,130
1996 to 2001	2.0 %	77,583
<i>Source: Statistics Canada. Census Canada.</i>		

The growth spurt that began in the Nanaimo area during the mid 1980's resulted in increased demand for both retail and office land uses, however, as is typically the case, there was somewhat of a lag in terms of the subsequent and associated surge in commercial development. This is evident in the City of Nanaimo's historical building permit activity, which is highlighted in Table 3.3 (following page).

A summary of building permit activities indicates:

- The high rate of population growth beginning in 1986 began to yield historically high levels of associated development activity during the early 1990's, particularly during 1992 and 1993, when total permit values exceeded \$142 million per year.
- As is to be expected following such a prolonged period of population growth, the vast majority of this development activity, roughly 80% over the 1992-93 period, was residential in nature. In contrast, commercial development permit values accounted for only 16% and 13% of all activity over the 1992-93 period.
- Although the 1994-95 period represented a cooling of overall activity relative to the 1992-93 period, with total recorded values of \$127 million and \$90 million, respectively, this still represented healthy levels of activity on a historical basis. What is interesting to note during this period is the increased proportion of commercial development permits, which accounted for 20% and 17% of all development permit values over this period.



**Table 3.3**  
**City of Nanaimo**  
**Historical Construction Activity, 1990 - 2001**

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	Average
<b>Commercial Construction (% of total)</b>	17%	13%	16%	13%	20%	17%	36%	27%	23%	56%	31%	46%	
Total permit values	\$19,425,000	\$14,234,000	\$22,262,000	\$18,124,000	\$25,504,000	\$15,681,000	\$61,572,000	\$27,974,000	\$17,839,000	\$48,202,000	\$24,084,000	\$29,896,000	\$27,066,000
<b>Residential Construction (% of total)</b>	59%	55%	79%	81%	67%	69%	60%	59%	43%	34%	37%	37%	
Total permit values	\$69,312,000	\$59,781,000	\$112,404,000	\$116,846,000	\$85,058,000	\$62,478,000	\$104,863,000	\$60,593,000	\$34,265,000	\$29,857,000	\$29,002,000	\$23,898,000	\$65,696,000
<b>Industrial Construction (% of total)</b>	4%	2%	1%	2%	1%	2%	1%	1%	7%	3%	1%	2%	
Total permit values	\$4,169,000	\$2,284,000	\$1,274,000	\$2,555,000	\$1,258,000	\$1,528,000	\$2,541,000	\$1,137,000	\$5,469,000	\$2,492,000	\$942,000	\$1,612,000	\$2,272,000
<b>Institutional Construction (% of total)</b>	19%	28%	2%	1%	8%	8%	1%	9%	22%	4%	27%	10%	
Total permit values	\$22,585,000	\$31,150,000	\$2,736,000	\$1,071,000	\$10,159,000	\$7,478,000	\$1,241,000	\$9,089,000	\$17,307,000	\$3,057,000	\$20,728,000	\$6,151,000	\$11,063,000
<b>Total Building Permit Values*</b>	\$117,381,000	\$109,678,000	\$142,288,000	\$143,403,000	\$126,850,000	\$90,404,000	\$173,332,000	\$102,264,000	\$78,843,000	\$86,634,000	\$78,023,000	\$64,544,000	\$109,470,000

1996 saw a dramatic increase in overall development activity, with total recorded permit values of just over \$173.3 million. This surge was driven mainly by a sharp increase in Development Cost Charges, which was implemented in 1997. Many development interests pushed their projects ahead in order to take advantage of the lower DCC rates. Although residential activity (\$105 million) again approached 1992-93 levels, it is the particularly dramatic increase in commercial activity, which drove the overall increase. Fully 36% of all development permit values recorded in 1996 were related to commercial construction projects.

Therefore, as the rate of population growth in the area was actually beginning to slow, commercial development was reaching a frenzied pace – in a very real sense “catching up” with the population surge that was just coming to a close.

It is important to note also, that since 1996, while overall development activity has been well below the average of the last decade (\$109 million), commercial development has continued to account for a more significant proportion of activity relative to the early 1990’s. 1999 saw over \$48 million in commercial development permits, second only to 1996’s record \$61.6 million, yet overall activity for this year totalled only \$86.6 million, well below the period average.

This activity is evidence of the typical pattern of residential versus commercial development. In other words, there is generally a significant lag, often as long as three or more years, after a period of strong population influx, before significant commercial development follows. The nature of this commercial development, and the determinants of future associated commercial land use needs are the subject of this document. Retail and office land use development and the current composition of respective floor space within the City of Nanaimo are dealt with in the following sub-sections.

### **3.2.1 Retail Development**

Given the City of Nanaimo’s status as the regional retail and service centre for both central and northern Vancouver Island, it is not surprising that the retail industry is the largest individual municipal-level employment sector – accounting for 15% of the total labour force and roughly 5,800 jobs. Significant growth in the City’s retail infrastructure has in fact taken place over the last decade and, in particular, since the mid 1990’s:

Major retailers in particular sought out locations in North Nanaimo, as a means of accessing a rapidly growing mid-to-north Island market. Significant growth in the city’s retail infrastructure has in fact taken place over the last decade and, in particular, since the mid 1990’s, as is outlined in the following table:

**Table 3.4**  
**City of Nanaimo**  
**Development of New Retail & Service Space (Sq. Ft.)**

Period	New Sq. Ft.	Avg. Sq. Ft. Per Year
1985 to 1989	652,000	163,000
1990 to 1995	1,075,359	215,000
1996 to 1999*	1,099,080	275,000
<b>Sources:</b> 1996 Retail Study (Coriolis), *City of Nanaimo building permit data.		

This increasing rate of retail development is a function of population growth not only within the City of Nanaimo, but also within the entire central and north Island region. (A discussion of the City of Nanaimo’s trading area is presented in section 3.1). Again, the surge of population growth in the region during the 1986-1996 period was the primary driver of strong retail development after 1996.

It is important also to consider the geographical distribution of new retail and service floor-space developed since 1996, as this is a strong indication of market forces and locational preferences:

**Table 3.5**  
**City of Nanaimo**  
**Retail & Service Space (Sq. Ft.)**

	North	Central	South	Total
1996	2,072,803	2,007,255	111,212	4,191,270
2001	2,969,206	2,192,170	111,410	5,272,786
Change	869,403	184,915	198	1,054,516
<b>Source:</b> 1996 Retail Study (Coriolis), B.C. Assessment Authority, DEC. 2001.				

The trend toward new-format or “box” retailing and the North sector’s attractive orientation relative to the Island Highway coupled with the existing retail infrastructure prior to 1997 (centered on Woodgrove Shopping Centre) led to this sector’s dominance in terms of attracting new development. In short, new format retailers sought out such high visibility, high exposure locations, as they offer the most direct means of reaching their respective target markets, and sufficient parking capacity.

New developments of note in the North sector since 1997 include:

- Longwood Station (new retail complex) – 103,700 sq. ft.
- Woodgrove Centre expansion – 260,000 sq. ft.
- Real Canadian Superstore – 140,000 sq. ft.
- Gateway Centre – 60,132 sq. ft.
- Wosks/United Furniture Warehouse – 54,200 sq. ft.
- Safeway supermarket – 47,000 sq. ft.
- Chapters bookstore (now Chapters-Indigo) – 16,000 sq. ft.

Clearly, the designated Woodgrove Regional Shopping Town Centre already exhibits elements of a strong northern gateway to the City of Nanaimo. While development within the North sector of the city has been consistently strong, additions and improvements to the Central (particularly the downtown area) and South sectors of the city have been (in recent years), relatively speaking, quite minimal. One of the issues to examine over the course of this study is the optimal distribution of future commercial development within the planned context of existing growth centre designations.

### **3.2.2 Office Development**

The market for office space in the City of Nanaimo consists mainly of local and regional service providers, including professional, health care, insurance, financial, government, institutional, business and resource company uses. Again, it is worthy of mention that the rate of office development increased significantly after 1994, at which point the total office inventory for the city stood at 1,327,488 sq. ft. – only two years before the RDN's population growth rate began to decline.

As shown in Table 6, in 1994, the total office inventory reflected a per capita office floor-space ratio of 19.1 sq. ft. (based on municipal population), somewhat lower than it had been in the mid 1980's (19.6 sq. ft.). The rate of commercial office development activity began to increase, in response to high levels of local and regional population growth over the 1986-1996 period, after 1994.

By 1999, the City of Nanaimo's total office inventory stood at 1,667,415 sq. ft., reflecting an increased per capita office floor area ratio of 21.9 sq. ft. By 2000, this figure, according to data released by B.C. Assessment Authority, is estimated to have increased to 23.9 sq. ft. per capita (based on an estimated inventory of over 1.8 million sq. ft.)

Generally, it is common for a municipality of this size and regional influence to see an increase in its per capita office floor area ratio over time, as it continues to adapt to the needs of a growing local and regional resident population and workforce. However, fluctuations in the rate will tend to occur as a natural result of the timing of increased demand and development of new supply.

**Table 3.6**  
**City of Nanaimo**  
**Historical Office Space Growth, 1984 - 2000**

	1984	1989	1994	1999	2000
Population	50,463	55,218	69,640	76,151	76,588
Total Office Floor Area (sq. ft.)	989,504	1,083,168	1,327,488	1,667,415	1,830,110
Per Capita Office Floor Area (sq. ft.)	19.6	19.6	19.1	21.9	23.9
Downtown Office Floor Area (sq. ft.)	604,955	617,744	677,405	788,623	847,801
Downtown Office as % of Total	61%	57%	51%	47%	46%
<b>Sources:</b> <i>B.C. Stats, B.C. Assessment Authority, Coriolis Consulting Corp.            City of Nanaimo Community Economic Development Office.</i>					

There has been substantial decline in the overall proportion of downtown office space as shown in Table 6. Although the total amount of office floor area within the downtown increased from roughly 605,000 sq. ft. in 1984 to over 847,000 sq. ft. in 2000, the downtown area's share of the City of Nanaimo's total office inventory fell from 61% in 1984 to only 46% in 2000.

Although a decline in the Downtown's share of office space is natural in a growing municipality, particularly with an increase in more suburban service-based office space, the rate of decline in this case reflects several important factors, which were identified in a 1994 Coriolis Consulting Corp. study. These include: higher population growth in the north end of the city, problematic vehicular access characteristics in the downtown area, the downtown area's limited supply of vacant land relative to other areas of the city, and the tendency for regional-serving office space users to locate further north, in order to take advantage of better access to the highway and thus the regional population.

The importance of Nanaimo's downtown in the context of the OCP's growth centre review will be more clearly examined in subsequent study tasks. However, having reviewed the Draft Downtown Development Plan, which outlines objectives, principles, policies, concepts, and actions designed to guide downtown development over the next five to ten years, there appears to be a need to re-evaluate the growth centre concept on a case-by-case basis. In other words, there exists a strong

need to clarify the respective roles and character of each individual growth centre and to prioritize development objectives based on relative importance over the short, medium, and long terms.

New development and revitalization within the downtown core should be of the highest priority in the context of the City of Nanaimo, as a strong downtown is an essential component of an attractive centre for both employers and residents. The decline of downtown Nanaimo, as reflected by high levels of vacancy (over 22% in 1998), decreasing user satisfaction, and significant decline in resident and visitor attractiveness, needs to be stemmed, perhaps even at the expense of planned growth in other areas of the city.

This is not to say that other defined growth centres should not see the desired improvements (in terms of the overall mix, design, population growth, etc.), but rather that the relative importance and timing of these growth centres' development needs to be more clearly investigated.

### **3.3 FORECAST LAND USE REQUIREMENTS**

In order to effectively forecast retail and office land use requirements for the City of Nanaimo, consideration must be given to anticipated employment and demographic-related changes, as these will have a direct impact on the extent and nature of demand.

#### **3.3.1 Employment Growth**

The nature of employment growth within the Nanaimo Regional District is both a function and determinant of the nature of population growth in the region. Anticipated changes in the RDN's sectoral employment profile are noted in the following table:

**Table 3.7**  
**Regional District of Nanaimo**  
**Sectoral Employment Forecast**

Category/Sector	Historical 1996		Estimated 2001		Anticipated 2021	
	#	%	#	%	#	%
Agriculture, other Primary	2,698	5.0%	2,689	4.4%	2,619	3.1%
Manufacturing	2,759	5.1%	2,994	4.9%	3,579	4.2%
Construction	4,973	9.1%	5,683	9.3%	7,432	8.8%
Transportation, Comm., Util.	5,341	9.8%	5,377	8.8%	5,530	6.5%
Trade	11,868	21.8%	13,993	22.9%	20,640	24.4%
F.I.R.E.	3,942	7.2%	4,094	6.7%	5,030	6.0%
Business Services	2,310	4.2%	2,566	4.2%	3,295	3.9%
Educational Services	2,184	4.0%	3,055	5.0%	3,380	4.0%
Health & Social Services	6,370	11.7%	7,027	11.5%	12,082	14.3%
Accom. & Food Services	5,444	10.0%	6,233	10.2%	10,646	12.6%
Other Services	3,713	6.8%	4,766	7.8%	6,709	7.9%
Public Administration	2,838	5.2%	2,627	4.3%	3,549	4.2%
Total Employment	54,440	100.0%	61,104	100.0%	84,489	100.0%
<i>Source: Regional District of Nanaimo. Economic Planning Strategy. February 1998.</i>						

Although primary industries will actually be the only sectors expected to nominally decline over this period, it is important to consider the changing proportions of each sector's employment base relative to total employment. In terms of share of overall employment, the following sectors are likely to see the most significant growth by 2021:

- **Trade (Wholesale and Retail):** 21.8% share in 1996, 24.4% share by 2021, growth of well over 8,000 positions
- **Health & Social Services:** 11.7% share in 1996, 14.3% by 2021, an increase of roughly 5,700 jobs
- **Accommodation & Food Services:** 10.0% share in 1996, 12.6% by 2021, or a nominal increase of over 5,000 positions.

These proportional changes reflect Nanaimo's continued role as a regional retail and service centre for the central and north Island regions, as well as the anticipated aging of the regional population (i.e. as evidenced particularly by growth in health and social service employment).

### **3.3.2 Demographic Changes**

The aging of the city and RDN populations will have a profound effect on demand for housing, services, and related commercial (both retail and office) development within the City of Nanaimo. According to 2001 Census information, while the region's 55 to 74 age group accounted for 22% of the overall population, the same was true of only 17% of the population at the provincial level. The 75 and over group accounted for 9% of the regional population, compared to only 6% B.C.-wide.

The correspondingly small proportion of residents in the 20 to 34 age group (15% in the region vs. 21% province-wide) is indicative of the historical net outflow of people from the region after completion of high school, as young adults seek educational, employment, and lifestyle opportunities in other areas of the province and the country.

Over the 2001 to 2031 period, the RDN's 65 to 79 age group will experience the greatest nominal increase of over 25,000 people; this also reflects a 130% increase relative to the 2001 population in this category. The 80 and over age group will, however, see the highest relative increase – 159% relative to 2001 levels (and a nominal increase of over 9,400 residents).

In short, while overall population growth is expected to be moderate (48% increase over three decades), there will be significant and rapid aging of the population (over 40% of this growth will be in the over 65 category), which will result in significant changes to the nature of demand for housing and for both retail and office space.

Rapid growth within the older age category, combined with a high household maintainer rate will result in housing occupancy demand increasing at a faster rate than overall population growth. A 48% increase in population to 2031 will result in an associated roughly 58% increase in occupied private dwelling units.

### **3.3.3 Future Retail Floor Area Requirements**

The City of Nanaimo's location, infrastructure, and amenities, will continue to make it the central and northern Vancouver Island's natural centre for retail and service activity. Although overall per capita retail sales have declined in recent years (all retail categories, including auto sales), the anticipated increase in home ownership resulting from the aging population will tend to result in favourable changes with respect to expenditures on home furnishings and furniture.



Department Store Type Merchandise (or DSTM) expenditures on the basis of recent data (2002), which reflects this recent decline in per capita retail expenditures has been forecasted and is shown in Table 8. For this reason, coupled with a very minor real year-over-year increase of 0.5% in per capita DSTM expenditures, the DSTM floor area forecast for the City of Nanaimo is deemed to be fairly conservative.

Firstly, it is important to consider anticipated growth in overall commercial floor area, as calculated by Coriolis Consulting Corp. in its 1996 Retail Study. Between 1995 and 2006, “General Merchandise” floor area for the City of Nanaimo was forecast to increase by between 80,000 and 120,000 sq. ft., while “Other Retail” space was expected to rise by between 1,095,000 and 1,470,000 sq. ft. Service-related floor area was anticipated to grow by between 215,000 and 290,000 sq. ft.

**Table 3.8**  
**City of Nanaimo**  
**Forecast Retail Floor-Space Growth - Baseline Growth**

	Projected		
	2006	2021	2031
<b><u>Primary Trade Area</u></b>			
Population	169,500	231,500	275,400
Forecast pop. growth rate	3.0%	2.1%	1.8%
Est. Per Capita DSTM expend.	\$2,459	\$2,650	\$2,785
Total DSTM Potential	\$416,726,000	\$613,371,000	\$767,002,000
Residual Growth (Annual Potential)	\$53,780,000	\$250,425,000	\$404,056,000
Warranted Floor Area at \$280/sq. ft.	192,000	894,000	1,443,000
<b><u>Secondary Trade Area</u></b>			
Population	154,600	190,400	214,500
Forecast pop. growth rate	1.5%	1.4%	1.2%
Est. Per Capita DSTM expend.*	\$2,409	\$2,597	\$2,729
Total DSTM Potential	\$372,492,000	\$494,385,000	\$585,445,000
Residual Growth (Annual Potential)	\$28,378,000	\$150,271,000	\$241,331,000
Warranted Floor Area at \$280/sq. ft.	101,000	537,000	862,000
<b><u>Tertiary Trade Area</u></b>			
Population	110,000	159,300	200,000
Forecast pop. growth rate	3.0%	2.5%	2.3%
Est. Per Capita DSTM expend.*	\$2,360	\$2,544	\$2,674
Total DSTM Potential	\$259,624,000	\$405,190,000	\$534,729,000
Residual Growth (Annual Potential)	\$33,585,000	\$179,151,000	\$308,690,000
Warranted Floor Area at \$280/sq. ft.	120,000	640,000	1,102,000
<b>TOTAL TRADE AREA POTENTIAL</b>	<b>413,000</b>	<b>2,071,000</b>	<b>3,407,000</b>
Est. City of Nanaimo Market Share	65%	55%	45%
<b>Required DSTM - City of Nanaimo</b>	<b>268,000</b>	<b>1,139,000</b>	<b>1,533,000</b>
<b>Required Retail/Restaurant/Service Floor Area</b>	<b>412,000</b>	<b>1,752,000</b>	<b>2,358,000</b>
<b>Sources:</b> Statistics Canada - Historical Retail Trade Data. Urbanics Consultants Ltd.			
<b>Notes:</b> * Revised baseline based on Urban Futures' population forecasts for City of Nanaimo and RDN.			

The City of Nanaimo serves a trade area which includes the following:

- **Primary Trade Area:** City of Nanaimo, remainder of the Regional District of Nanaimo, and Ladysmith.
- **Secondary Trade Area:** Alberni-Clayoquot Regional District, Comox Strathcona Regional District
- **Tertiary Trade Area:** Remainder of Cowichan Valley Regional District, Mount Waddington Regional District.

Based on population growth and expenditure trends within these areas, total incremental (i.e. increase relative to 2002) trade area (not City of Nanaimo) DSTM-related floor area potential has been calculated to be 413,000 sq.ft. by 2006, roughly 2.1 million sq.ft. by 2021, and about 3.4 million sq.ft. by 2031.

Based on a gradually declining trade area market share for the City of Nanaimo over the study period (to reflect anticipated growth in other trade area locations to the north), the consultant has calculated the following additional floor area requirements:

- DSTM floor area: 268,000 sq. ft. by 2006, 1.1 million sq. ft. by 2021, 1.5 million by 2031
- Retail/Restaurant/Service floor area: Including DSTM requirements – 412,000 sq. ft. by 2006, 1.8 million sq. ft. by 2021, and about 2.4 million sq. ft. by 2031.

### **3.3.4 Future Office Floor Area Requirements**

Total office inventory within the City of Nanaimo is now estimated at roughly 1.85 million sq. ft. A preliminary market review, as reflected in Table 9, suggests that the per capita office floor area ratio is likely to rise gradually from its current level of 24.5 sq. ft. per resident throughout the study period. This will be the general trend during this period, in reality, this ratio may see some fluctuation as a result of a myriad of market dynamics, including the time required for development of new office projects. (For example, the consultant sees particularly strong opportunities for development of high quality office space along the City of Nanaimo's downtown/waterfront area.)

Preliminary findings suggest the following incremental office floor area requirements for the City of Nanaimo, relative to the current inventory:

- 155,000 additional sq. ft. by 2006, including 35,000 sq. ft. for downtown.
- 475,000 additional sq. ft. by 2016, incl. 130,000 sq. ft. for downtown.
- 1,227,000 additional sq. ft. by 2031, incl. 384,000 sq. ft. for downtown.

These figures assume that the downtown’s share of total City of Nanaimo office inventory does not fall below 40% over the course of the study period. While there is no theoretical “ideal” downtown office space to total office space ratio for a municipality of this size (or character), rapid decline in the ratio may be cause for concern. It is natural to see a gradual decline in this ratio in a municipality that is growing and offering increasing “suburban” (in this case, non-downtown) office development opportunities. In this regard, it is highly recommended that the City of Nanaimo investigate means of revitalizing its downtown area, in part through examination of the potential for high quality downtown office development.

**Table 3.9**  
**City of Nanaimo**  
**Forecast Office Space Growth**

	2002	2006	2011	2016	2021	2026	2031
Population Forecast	77,133	80,181	85,032	91,181	98,584	106,559	113,954
Per Capita Office Floor Area (sq. ft.)	24.5	25.0	25.0	25.5	26.0	26.5	27.0
Total Office Floor Area Required (sq. ft.)	1,889,759	2,004,525	2,125,800	2,325,116	2,563,184	2,823,814	3,076,758
Downtown Office Floor Area (sq.ft.)	850,391	881,991	914,094	976,549	1,050,905	1,129,525	1,230,703
Downtown Office as % Of Total	45%	44%	43%	42%	41%	40%	40%
Existing (2002) Office Inventory (est.)	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000
<b>Residual Office Space Demand - Total*</b>	<b>40,000</b>	<b>155,000</b>	<b>276,000</b>	<b>475,000</b>	<b>713,000</b>	<b>974,000</b>	<b>1,227,000</b>
Existing (2002) Office Inventory - D.T. (est.)	847,000	847,000	847,000	847,000	847,000	847,000	847,000
<b>Residual Office Space Downtown - Total*</b>	<b>3,000</b>	<b>35,000</b>	<b>67,000</b>	<b>130,000</b>	<b>204,000</b>	<b>283,000</b>	<b>384,000</b>

**Sources:**

Urban Futures  
 Urbanics Consultants Ltd.

**Note:**

\* Rounded to the nearest 1,000.

### **3.4 SUMMARY AND STRATEGIC CONSIDERATIONS**

The review of commercial development trends indicates:

- The population growth spurt in the City and Regional District, beginning in the mid-‘80’s resulted in increased demand for retail and office land uses during the early ‘90’s
- The retail industry makes up the largest individual municipal-level employment sector – making up 15% of the total labour force, there has been significant growth in the retail sector since the mid-‘90’s – a function of population growth within the City and surrounding region
- The northern region of the City has dominated in attracting new retail commercial development, the central and southern regions have been somewhat limited
- The rate of commercial office development activity began to increase, in response to high levels of local and regional population growth over the 1986 to 1996 period
- There has been a substantial decline in the overall proportion of downtown office space relative to other growth centers

In addition, the forecast of retail and office land use requirements for the City suggests:

- A nominal decline in primary industries
- Significant growth in the trade (wholesale and retail), health and social services, and accommodation and food services
- That proportional changes are a reflection of Nanaimo’s continued role as a regional retail and service center for the central and north Island regions, as well as anticipated aging of the regional population

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## **4.0 Issues Matrix Preparation**

In order to assemble the information collected and analyzed (documented in the preceding sections of this report), an Issues Matrix was prepared. The Issues Matrix was used by the project team as a tool to summarize findings in an effort to see themes emerge which would lead to a direction for various OCP scenario options. The Issues Matrix includes a description of the issue to be addressed, the current OCP policy, a discussion of the relationship to the analysis undertaken, and an indication for possible future OCP direction or scenario development.

The Issues Matrix was prepared and submitted to the City for review and a number of revisions were made. The Issues Matrix table is found in Appendix C. Preliminary conclusions drawn from the Issues Matrix were presented for public consultation and are summarized in Section 6.0 of this report.

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## **5.0 Community Consultation**

### **5.1 INTRODUCTION**

As part of the process to review the growth center concept, community stakeholders and the general public, reviewed background material collected (e.g. population, residential projections etc.) and the implications of these trends on growth centers. Public involvement included a stakeholder workshop and two public open houses to present technical findings and introduce scenario development options. In addition, a presentation of the Policy Directions Report was made to the Plan Nanaimo Advisory Committee. A summary of input from the stakeholder workshop and public open houses and an outline of the presentation to PNAC is provided below.

### **5.2 STAKEHOLDER WORKSHOP**

A workshop was held on Wednesday, February 5, 2003 with invited community stakeholders representing social, environmental and development groups. The purpose of the workshop was to:

- Meet with informed stakeholders with an interest in the future look and shape of Nanaimo
- Present the findings from the demographic, residential and commercial analysis undertaken as part of the Growth Centre Assessment
- Outline the development of the broad recommendations for OCP policy change regarding the Growth Center Concept (i.e. suggestions for possible changes)
- Explore, from the workshop participant's perspective, their ideas for the future of the growth center concept

Following a presentation by the consultant team, the workshop group was divided into 4 discussion tables. Each table was asked to comment on the presentation and answer the following questions: "Do our suggestions seem reasonable? Does it fit with your experience?, Based on your knowledge, does it fit with the goals and objectives of the City?"

The tables proceeded to discuss the implications of the findings and issues of concern or interest. The individual tables then summarized the main points resulting from their discussions and presented these to the entire workshop group. Below is a summary of their comments as presented:

**Table 1**

- Agree with the consultants, that there is a need to more clearly recognize the differing character of many of the defined growth centres, particularly those higher order centres (i.e. defined “town centres”)
- Believe Woodgrove and Rutherford “town centres” should not “consolidated” as was suggested – Longwood and Rutherford have much more in common than Rutherford and Woodgrove, and so these two areas should be treated as one.
- Increased densification is desired, however the City needs to have more realistic goals – consider small-lot single family subdivisions for example, rather than pushing for apartments.

**Table 2**

- Concern re: stats reflected in growth plan a result of current industries but not NEW industry, lack of focus on potential for new industries, such as tourism, high tech.
- Associated demand for new forms of residential housing – higher density, higher quality
- Geographic anomaly – linear pattern makes it difficult to entertain growth potential “off the strip”, development of smaller “growth centres” at risk
- Focusing too much growth within the larger hierarchy. Centres may result in even higher auto dependency
- Distributing some social services into some smaller areas, rather than just within larger centre (Hospital)
- Listen to the market – restricting development-type controls dangerous
- Huge potential to develop waterfront – encourage this – cultural/entertainment
- Sustainable building practices – don’t be so prescriptive within specific areas, but allow for “off-site improvements”
- Consider rapid growth within the North Sector and its effects on other existing areas such as Country Club – look at land capacity (no need to expand north for example if vacancy rates elsewhere are untenable)
- Put more emphasis on high tech industries, but need better transportation infrastructure – airport needed, need one vocational/technical institute, and plan for a tech./business park, which will act as a catalyst for this type of development. Lifestyle is very important for workers in these industries, which would create new development opportunities, both residential and

commercial. High tech. growth is already happening (creation of 1,000 jobs), so why not start building on this potential?

**Table 3**

- Very defined guidelines for the Woodgrove Regional Service Area
- Hospital Regional Service Centre – need to improve access via multi-transportation modes (transit and roadways)
- Reality isn't pretty – migration of all retailers to the North is hurting existing retail clusters – also contributing to the further “stripification” of Nanaimo
- Many community-oriented areas – concerned about lack of funds to properly develop Neighbourhood Villages – how can we consider elimination of certain smaller growth centres without giving communities the opportunity (e.g. \$) to actually plan for these areas?
- Woodgrove – needs office, higher density residential, far too auto dependent -0- how is this a “self-sustaining community” or town centre?

**Table 4**

- Range of “growth centres” – the university is not referred to as a growth centre but why? (politics?) – support housing potential in areas around the university
- Woodgrove is most well defined area
- Contradiction to be encouraging regulation that prevents retail development other than “supermarkets” in areas such as Chase River – people still have to travel north to Woodgrove in order to “get a stick of lumber”
- Need to be more flexible and less prescriptive with development within these growth centres – “town centres” are all different
- Sprawling at the expense of Chase River, Terminal, city core
- OCP would impact servicing –
- Flexibility is very important and is not reflected in the current OCP – far too prescriptive and unreasonable in its goals for growth centres (too many blanket policies)
- OCP is a plan guiding development, but it has a tendency to lock into ideas – Lifestyles, retail always changing – need to be able to respond to market forces and to do this.

- Potential shift with regard to attraction of younger workers – affordability, business start-up climate, selling features exist – people of working age are in fact desiring to move here
- Need to provide new forms of supply, since there are not currently enough forms of creative multi-family housing – supply to a large degree influences demand – people want NEW property (that’s the trend)
- If the quality and choice do not exist, then this younger target group has few alternatives but to look elsewhere. May take a little risk, but it may be necessary to create some new, niche supply to stimulate demand from a group that now can’t even consider Nanaimo as a place of permanent residence.

### 5.3 PUBLIC OPEN HOUSES

Two public open houses for the general public were held on Thursday, February 6, and Tuesday, February 11, 2003 at Beban Park. Various displays were available for viewing outlining OCP policies with respect to the growth center concept. The purpose of the public open house was to provide an opportunity to inform the public of the study and seek their comments on the findings. A comment sheet was provided as a means to record opinions of the attendees.

Over the two open houses, about 50 people attended. There was a wide range of reaction, however, most saw merit in assessing growth centers in relation to projected population growth and change together with changing residential and commercial demands.

Comments varied from identifying specific growth centers for elimination or change of status to more community-wide issues of transit and design control. Below is a summary of comments received by the public, both at and following the open houses:

- Change Departure Bay from a Neighbourhood Village to a Local Service Centre, given the extent of existing nearby commercial development at Northbrook Village and Country Club Town Centre
- Place Harewood as top priority, given location of College, Aquatic Centre, available lands for development, recreational opportunities, good highway access, and existing schools
- Question the distribution of resources, including police, fire, health and school facilities, between each Town Centre
- Support for Downtown Town Centre and the need to strengthen townhouse and hi-rise residential base, suggests Chapel Street for townhouse development, hi-rise development below Cliff Street if properties on east side of Front Street are purchased by the City and

returned to historic use as public green space, emphasizes need to open up natural harbour and have attractive waterfront access

- Concern raised over the loss of business in the Downtown and the proliferation of commercial enterprises outside of Downtown, recommendation to change linear road and development pattern to centralized pattern, with all roads leading to Downtown
- Support for growth centers as a means to stop urban sprawl, focus on compact communities, and need for development/design control
- Support for tying urban planning with demographics and need to acknowledge accessibly and easy transit
- Support for growth centers with issues such as adequate parking and improved transit system to service the centers
- Eliminate Wakesiah Avenue and Jingle Pot Road as a neighbourhood village given close proximity to Downtown, as well as Harewood Shopping Centre

#### **5.4 PLAN NANAIMO ADVISORY COMMITTEE**

A presentation of the Policy Directions Report was made to the Plan Nanaimo Advisory Committee (PNAC) on October 19, 2004. The presentation provided Committee members with an overview of the Growth Centre Assessment project and specifically, emphasized key findings, scenario development, and report recommendations. This included a discussion that the City consider a refocusing of the Growth Centre Concept as currently contained in Plan Nanaimo to encompass three regional service centres and eight neighbourhood villages. As there was no quorum, the Committee tabled the presentation for information.

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## **6.0 Potential Scenarios for the Growth Centre Concept**

### **6.1 INTRODUCTION**

An understanding of background information, the projection of growth and change with respect to population, residential and commercial demands, combined with the consolidation of information in the issues matrix and the input from stakeholders and the general public, has led to some significant implications for the growth center concept.

### **6.2 SUMMARY OF FINDINGS**

The following summarizes the key findings from the review of Plan Nanaimo policies. The comparison between the policies and the findings, suggests a refocusing of the vision for the growth center concept.

#### **DEMOGRAPHICS: Population Growth**

Population growth within the City of Nanaimo is projected to grow by 37,000 in the next 30 years. Plan Nanaimo proposes a number of growth centers, both Town Centres and Neighbourhood Villages. OCP population projections for the City assumes growth continues at historic rates. Plan policies suggest that the target populations for each of the six allocated town centers is 5,000 to 10,000 people - a cumulative total between 30,000 to 60,000 people. In addition, growth can also be accommodated in Neighbourhood Villages, as well as suburban areas outside the Town Centers. (The OCP states that there is enough currently zoned single family residential land to accommodate 50,000 people.) A comparison between projected growth of 37,000 people and the assumed growth within Plan Nanaimo, suggests that there is more than enough capacity within the designated Town Centers to accommodate growth, assuming all growth will go to the six Town Centers.

The implications of this finding to the growth centre concept is to consider reducing:

- the number of growth centres, (Town Centres and Neighbourhood Villages)
- the physical size of some or all of the Town Centres or the consolidation of some Town Centres, and/or
- the target populations for the Town Centres

in order to provide a better match to population trends. There is simply insufficient future population to fill the space available within the established growth centres.

### **RESIDENTIAL TRENDS: Population Change and Forecast of Dwelling Units**

Currently, the City's population is dominated by working age groups. Over the next 30 years the City's population will age with slower growth in the age groups under 55, and higher growth in the 55 plus age groups. The 65 to 79 age group will have the greatest relative growth. Due to the City's aging population and higher household maintainer rates with age, the number of dwelling units is forecasted to increase at a faster rate than the population. In total, 18,820 dwelling units are forecasted. The greatest absolute increase will be for ground oriented units -- 14,560 compared to 4270 apartment units. The forecast is for continuing demand for ground oriented dwellings.

Plan Nanaimo's policies on target densities in Town Centers assumes high density residential living, such as apartments at densities of 100 to 150 units per hectare. A comparison between forecasted demand for higher density accommodation (about 4300 units over 30 years) and the target densities in Town Centers for high density residential living, indicates that the demand for apartment living will not be sufficient to achieve target densities for all growth centers.

The implications of this finding to the growth centre concept is to consider a re-alignment of target densities for Town Centres to be more in accord with ground oriented accommodation which is aligned with future demand.

### **COMMERCIAL TRENDS: Historic Commercial Development and Dominance of Northern Sector**

Historically commercial development in Nanaimo has evolved as an almost continuous linear pattern, as a direct result of access along the Island Highway. The locational advantages of the northern sector of Nanaimo given the regional trade area has resulted in a concentration of retail commercial activity in this area. Projected development supports Nanaimo continuing as a regional commercial, transportation and health center.

Plan Nanaimo strives to create six, equal Town Centres, geographically spaced within City boundaries. Current policies suggest fostering the same level of residential and commercial development within each. However, each Town Centre has a distinctly different role given the historic pattern of commercial development. For example, the north sector of the City continues to account for the largest proportion of retail development, largely due to the orientation to the island highway, existing retail infrastructure and trends to big box format. This can not easily be replicated elsewhere. A comparison between the historical pattern of development and with Plan Nanaimo policies for six Town Centres spaced throughout the City, suggests that there is a need to recognize the unique regional function of the various town centers.



The implication of this finding is the recognition that each Town Center's distinct role should be re-enforced in the OCP, capitalizing on the different characteristics of each. The regional functions of some of the Town Centres should be recognized by redefining them as Regional Service Centers - --the highest order of growth centers: the Woodgrove/Rutherford area to serve as the Regional Retail Centre, Hospital to serve as the Regional Health Centre, and Downtown as the Regional Administrative/Cultural Centre - each serving a unique and important regional function (i.e. rather than six equal town centers). The remaining Town Centres (Chase and Country Club) serve a City or community function rather than regional function. This would require a Structure Plan for each emphasizing the appropriate characteristics and functions it serves.

### **A Refocusing of the Vision for Growth Centres**

Our findings suggest a refocusing of the vision for the growth centre concept in Nanaimo. The following are key considerations for refocusing:

- reduce the number of Town Centres to recognize population forecasts and characteristics
- consolidate two of the Town Centres to recognize existing development patterns (Woodgrove/Rutherford)
- realign target population and densities in Town Centres and Neighbourhood Villages to reflect changing demographics and forecast for ground oriented housing
- focus on hierarchy of centers to acknowledge regional function of three unique town centers: Woodgrove/Rutherford, Hospital, and Downtown and prioritize the development of Structure Plans for the three regional centres

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## 7.0 Scenario Development

Based on the results of the analysis contained in the Technical Background Report and provided in previous report section, several possible scenarios for the future of the growth centres were developed. The scenarios considered the following components:

- The hierarchy of growth centres
- The type (density, growth rate) or nature of land uses that make up Growth centres
- The number and location of Growth Centres

### 7.1 ASSUMPTIONS WITH RESPECT TO SCENARIO DEVELOPMENT

Through the discussion at the project team workshop and in consultation with City staff, the following assumptions were identified and confirmed as a means of defining future scenarios. These assumptions are common to all three scenarios.

- Approximately 37,000 people additional people will be added to Nanaimo's population, over the next 30 years.
- The average age of the population of Nanaimo and Region will increase over this time period.
- There will be a strong desire for ground oriented housing and the forecast is for 11,400 single detached, 3,100 attached ground oriented, and 4,300 apartment housing units to accommodate forecasted population growth.
- About 1.2 million additional square feet of additional office space will be required, including 384,000 square feet for downtown Nanaimo.
- About 2.1 million additional square feet of Department Store Type Merchandise (DSTM) space will be required.
- Regional Growth Management Plan principles will hold firm.
- Nanaimo will continue to be a regional retail, health, legal, education and government (regional/provincial/federal) centre.
- There will be no significant change in the roles of other urban centres within the regional context.
- There will be no major change to the City's current municipal boundary.
- Economic growth will continue much as it has (i.e. no major industrial development such as an aluminium smelter in Port Alberni).

- There will be no major change to regional servicing (sanitary & water). (i.e. no significant servicing will be done outside the urban containment boundary).
- There will be no major transportation changes (i.e. no regular service from Westjet or a similar carrier, no major ferry cost increase, no fixed island/mainland bridge, no significant commuter service on the island railway, downtown Nanaimo to downtown Vancouver passenger ferry service exists but not in a significant scale to impact development).
- There will be no additional major road infrastructure improvements, including improvements to intersections between municipal road infrastructure and the Parkway.
- The Parkway will remain a limited access highway with no new commercial development permitted along its corridor.
- There will be no significant investment in the public transit system (e.g. Skytrain type development) and transit service will remain similar to that of today.
- Some development will occur on the Treaty Settlement Lands or outside of areas currently marked for development in the Regional Growth Management Plan, particularly on lands within or adjacent to the City, however, this will be limited largely to residential development with localized commercial activity to service the immediate neighbourhood. Large scale retail commercial development is not anticipated.

## **7.2 DEFINING THREE SCENARIOS**

The following three scenarios evolved:

- Scenario One: Status quo
- Scenario Two: Refocused Growth Centres
- Scenario Three: Major Policy Shift

A definition of each of the three scenarios together with the general characteristics of each scenario, as well as their relative strengths and weaknesses, are outlined in the sections below:

### 7.3 SCENARIO 1: THE STATUS QUO

Scenario one is “the status quo”: no major policy changes over the next 30 years with respect to the growth center concept as one of the cornerstones of Plan Nanaimo. In other words, in spite of the projections, assumptions for the future, etc. (undertaken in Phase Two of this assessment) the City holds firm with their OCP policies to maintain the growth centre framework comprised of:

- 6 Town Centres,
- 11 neighbourhood villages,
- policies supporting an urban containment boundary,
- a residential average density of 15 units /hectare, and
- a capacity for 50,000 people without density changes in the town centres.

A conceptual plan map for scenario one is shown in Map 1: Scenario 1 Status Quo.

Within the time frame forecasted of 30 years the following might be anticipated:

- The pressure for single family and ground oriented housing results in the Urban Containment Boundary (UCB) is expanded to meet the current City Boundary. (Note: This is not considered a change in OCP policy, as it has always been anticipated that the area outside the UCB would be developed when vacant “Neighbourhood” designated land became scarce.)
- Under this “status quo” scenario “suburban” designated land previously outside the UCB would be re-designated “Neighbourhood” and could be developed per existing OCP policies with an average density of 15 units per hectare.
- All other OCP designations would remain the same.

#### Strengths

The following elements have been identified as strengths of the Status Quo Scenario:

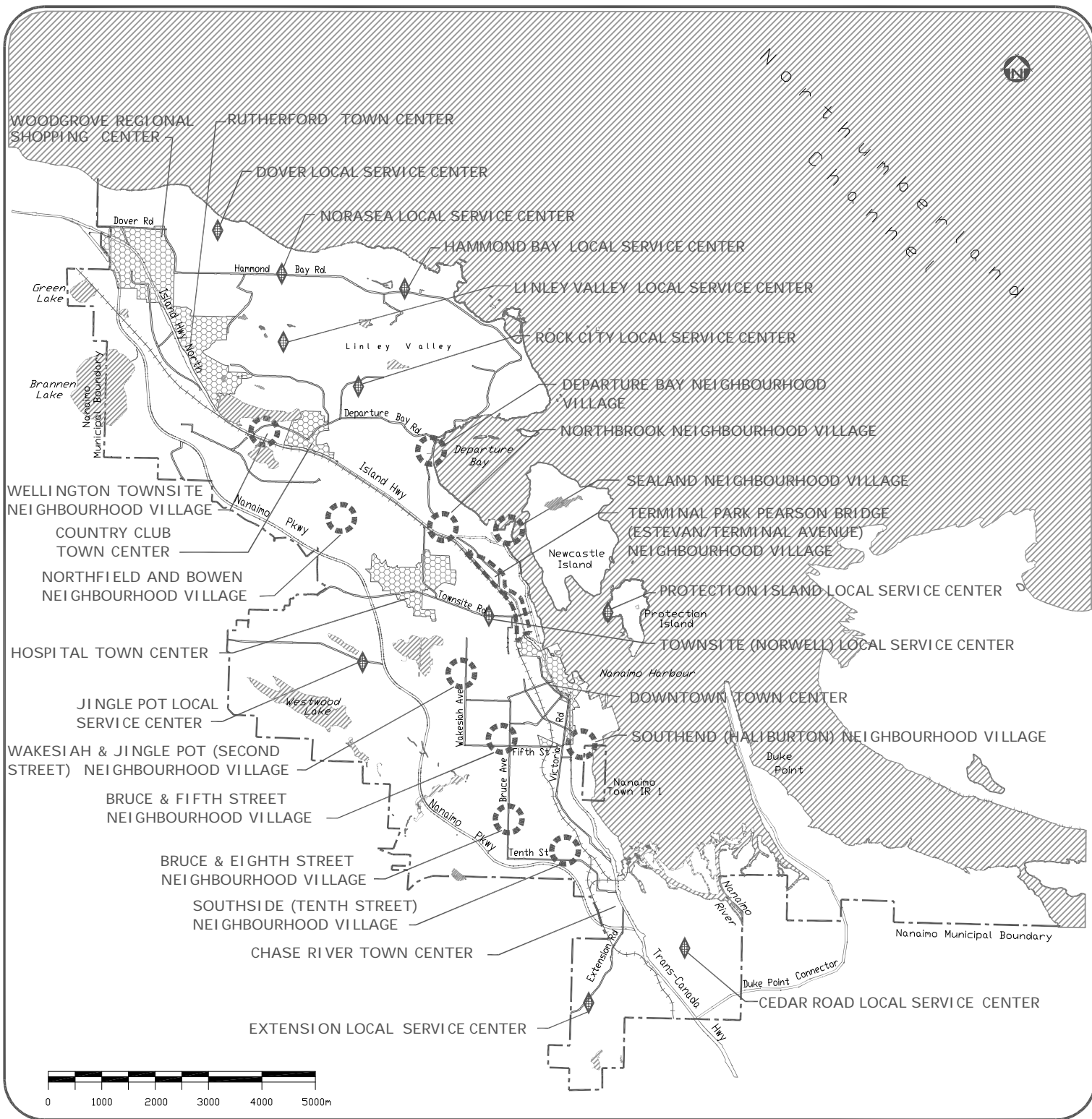
- “Politically expedient”
- High community acceptability (i.e. Plan Nanaimo has been adopted)
- Relatively low cost / low hassle for staff / Council
- Responds to developer’s need to have flexibility in marketplace largely because there are no Area Structure Plans (ASPs) to prescribe land use within the growth centers

- No distinction between each of the six centres which maximizes flexibility
- Employment areas (enterprise areas) are well defined and focused
- There is sufficient capacity to accommodate all anticipated residential growth within Nanaimo

### **Weaknesses**

The following elements have been identified as weaknesses of the Status Quo Scenario:

- No planning direction without ASPs
- No coherence, there will be continued fragmentation of uses within City
- No prioritization of Town Centres or Neighbourhood Village Centres, nor specialization to capitalize on the unique attributes of the different town centers and therefore no focus for development
- Prescriptive measures, for example, 150 uph as target densities, do not reflect the reality of economy, current infrastructure, consumer preferences etc.
- Does little to encourage revitalization of Downtown because development is essentially wide open to locate within any town centre
- Can not have focused growth in 17 growth centres (given residential and commercial trends and lack of prioritization) within the implied time frame of OCP (30 years)
- The 30 year time frame of the Plan is beyond a reasonable time frame of predictability as many external events could significantly alter population, housing and commercial forecasts
- The growth center concept is an attempt to superimpose a growth centre framework on the existing urban fabric developed on historical development patterns which does not lend itself to the multi-nodal concept



City of Nanaimo  
GROWTH STRATEGY REVIEW

Scenario 1  
STATUS QUO



TOWN CENTER



NEIGHBOURHOOD VILLAGE



LOCAL SERVICE CENTER

## 7.4 SCENARIO 2: REFOCUSED “GROWTH CENTRES”

Scenario 2 is a refocusing of the growth centre concept in light of the population, housing and commercial forecasts. In other words, given the projected population, nature of future housing form, and commercial trends documented during Phase 2 of this assessment, the OCP vision is refocused and the growth centre concept is realigned, as described below:

- As in scenario 1, the pressure for single family and ground oriented housing results in the Urban Containment Boundary (UCB) being expanded to meet the current City Boundary. “Suburban” designated land outside the UCB would be re-designated “Neighbourhood” and developed per existing OCP policies with an average density of 15 units per hectare.
- The approach to the growth centre concept must be refocused and their number, size and/or scale must be reduced and unique characteristics strengthened in order to successfully develop “growth centres”.
- Three Regional Centres are recognized, acknowledging the following regional functions:
  - (a) Woodgrove’s current and future position as a regional shopping/service hub, with future potential for high density residential and regional office development in the medium to long range;
  - (b) The Hospital as a mid island medical service centre with potential for significant medium density housing, including a range of residential care facilities and associated specialty retail, perhaps incorporating “main street” design concepts, in the short to medium term; and
  - (c) Downtown as a city and regional art, culture, administrative/office and festival/entertainment centre with significant potential for a range of higher density residential development, taking better advantage of an under utilized waterfront in the short to medium term – Downtown should be a focus of residential development for the City. (Due to the existing transportation infrastructure, particularly access to downtown, the office component of downtown Nanaimo is anticipated to be oriented towards a local or City-based scale rather than the regional office focus in the Woodgrove Regional Centre.)
- With respect to Town Centres:
  - (a) Rutherford Town Centre is kept the same and does not become a regional centre in conjunction with Woodgrove. While some parts of this TC may function as a regional draw (Rutherford Mall) this Town Centre should be distinct.



- (b) The remaining two “Town Centres” (Country Club & Chase River) are scaled back in size to something closer to a “neighbourhood village” in order to better reflect the projected need/demand for additional commercial and the limited demand for higher density residential.
- With respect to Neighbourhood Villages a total of eight are supported. The following are confirmed:
  - (1) North Wellington
  - (2) Northfield at Bowen
  - (3) Northbrook
  - (4) Terminal Park
  - (5) Bruce at Fifth
  - (6) Second Street (Wakesiah and Jinglepot)
- Plus two redesigned Town Centres are proposed as Neighbourhood Villages:
  - (7) Country Club
  - (8) Chase River
- The following neighbourhood villages are proposed to be eliminated:
  - (a) Sealand
  - (b) Southside (Tenth)
  - (c) Southend (Haliburton)
- The following current Neighbourhood Villages are refocused as Local Service Centres:
  - (1) Bruce at Eighth Street
  - (2) Departure Bay
- The following “Local Service Centres” remain:
  - (3) Dover
  - (4) Linley Valley
  - (5) Hammond Bay
  - (6) Jinglepot
  - (7) Norewell (Townsite)

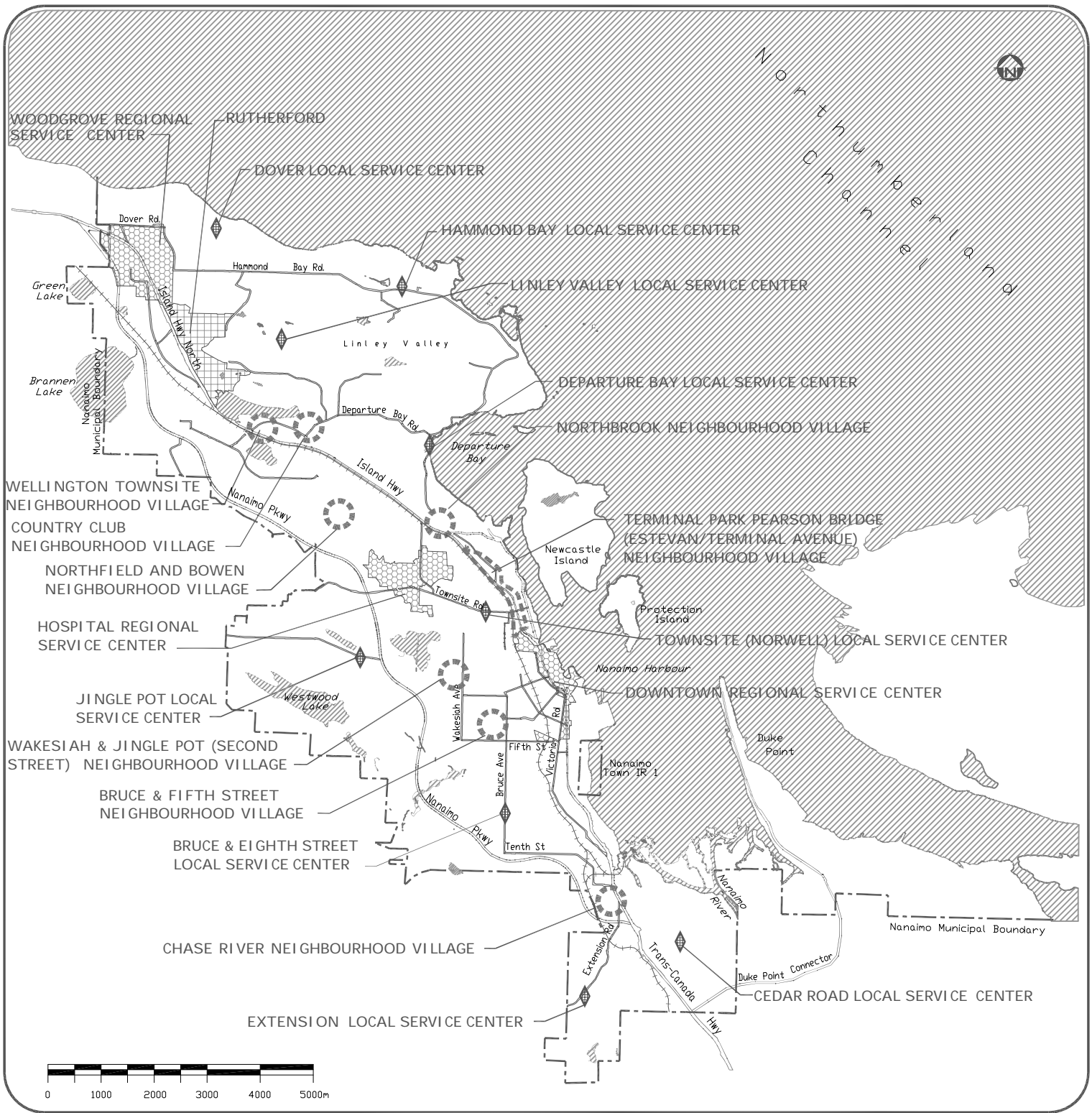
- (8) Extension
- (9) Cedar Road
- The following “Local Service Centres” are eliminated:
  - (a) Protection Island
  - (b) Rock City Road
  - (c) Norasea

### **Strengths**

The following strengths of the Refocused Growth Centre have been identified:

- Rutherford forms part of regional shopping cluster with Woodgrove but it is not a regional service centre on its own nor functions as a town center
- Regional Service Centre (RSC) involves integrated land uses and mixed land uses in an effort to create a community to live, work, and recreate focused in three regional centres
- Area Structure Plan required to define goals, different land uses, densities, character within RSC
- 1st tier centres are Regional Service Centres which have a regional or outside City boundary draw, as well as a “local” (i.e. City of Nanaimo) function, which reflect functional reality
- RSC are anchored by, in the case of Woodgrove, major department stores, new format retailers (large) or in the case of Hospital, the Nanaimo Regional Hospital
- 2nd tier centres are Neighbourhood Villages, those that are community centres, largely servicing the City’s population, rather than regional population. These include: Chase and Country Club Neighbourhood Villages
- Neighbourhood Villages are neighbourhood-oriented shopping centres with surrounding residential that meet the “day to day” needs of the surrounding community, typically include anchors such as a bank, grocery store, gas station and/or drug store

A conceptual plan map for Scenario Two is found on Map 2: Scenario 2 Refocused Growth Centres.



## City of Nanaimo

# GROWTH STRATEGY REVIEW

## Scenario 2

# REFOCUSSED GROWTH CENTERS



REGIONAL SERVICE CENTER



COMMERCIAL



NEIGHBOURHOOD VILLAGE



LOCAL SERVICE CENTER

Map  
2



## 7.5 SCENARIO 3: MAJOR POLICY SHIFT

Scenario three represents a major policy shift in that it essentially suggests an abandonment of the growth centre concept as currently outlined in Plan Nanaimo and a refocusing of development Downtown Nanaimo as the primary growth centre. The focus of scenario three relates to building upon the historical development pattern of the City in light of anticipated development trends. A conceptual plan map for scenario three is shown on Map 3: Refocused Downtown.

The following outline the characteristics of scenario three:

- Spinal development is reinforced but with a strong Downtown, and one large regional shopping concentration in Woodgrove/Rutherford
- Existing Commercial development along the Highway is recognized
- Downtown is strengthened with revitalization efforts, including additional housing and public institutional use
- Residential will continue within currently defined neighbourhoods and within the UCB

### Strengths

The following strengths of the Refocused Downtown have been identified:

- Recognizes existing trends and development patterns
- Does not require a major shift in thinking, as it is a reflection of existing conditions
- Highly flexible for private sector development
- Simpler, with fewer competing commercial centres
- Recognizes Downtown as one of two major activity nodes and thereby will help promote Downtown

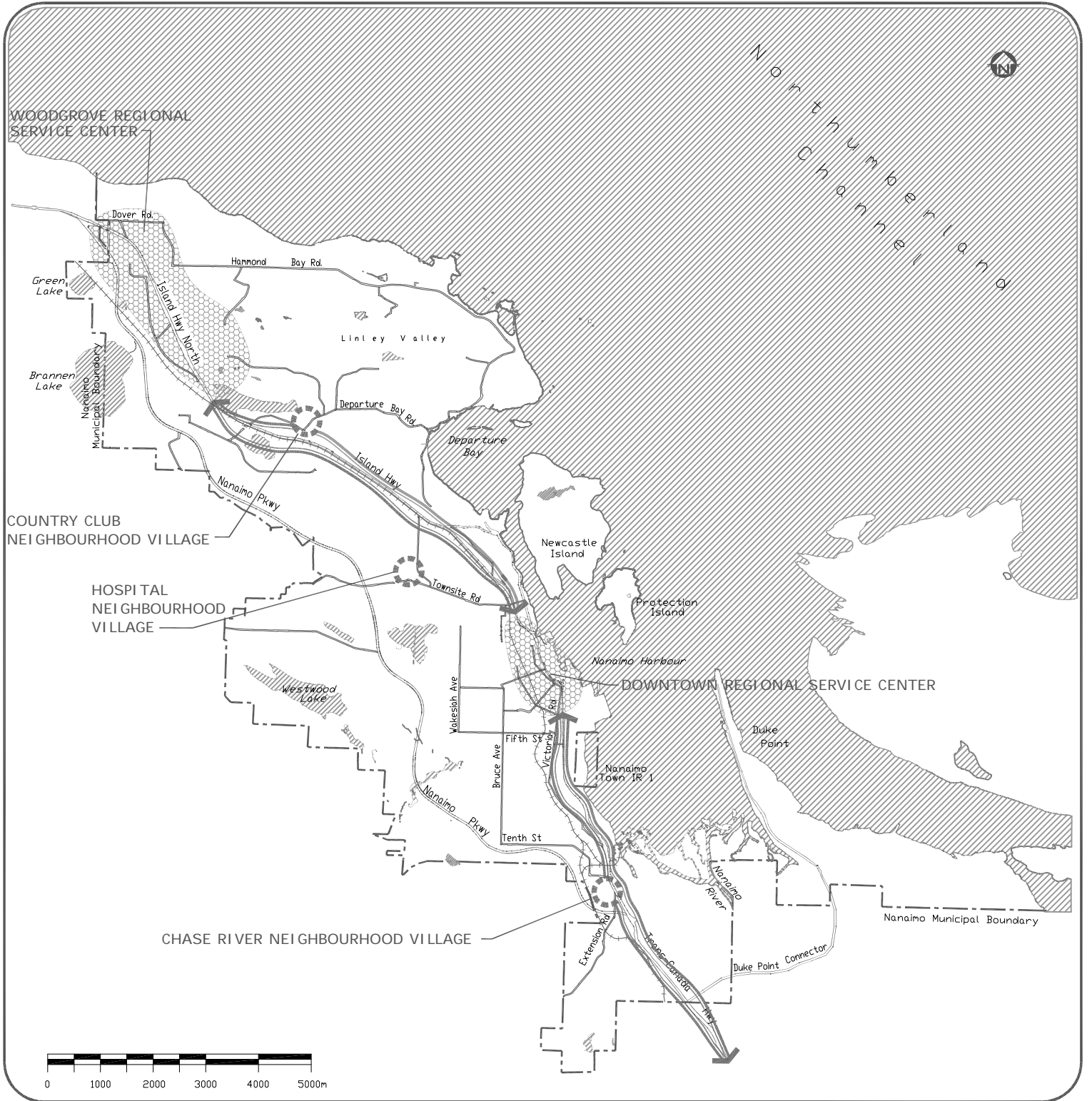
### Weaknesses

The following weaknesses of the Refocused Downtown have been identified:

- Requires strong policy initiatives for Downtown to be redeveloped
- Requires improved access / exposure for Downtown to be implemented
- Places less emphasis on neighbourhood communities with focus of development in two regional centres

Under scenario three the following could be anticipated:




- The Regional Growth Management Plan (RGMP) is weakened, incrementally, over the next 30 years due to growth pressure - Parksville and Qualicum expand their boundaries to incorporate more land for residential and commercial growth.
- City Council agrees to expand urban services for health and safety reasons. (As a result of failing septic systems and increased sewage disposal standards, numerous areas previously not considered for sanitary service are “hooked up”. Water quality issues related to well water also result in formal water service being extended to a significant number of non-urban areas.
- Owners of tracts of land previously designated for low density residential or agriculture begin requesting higher density as a result of these new services, which now makes development of their land possible.
- Growth coupled with new resident’s demand for ground oriented housing drives the expansion of development into areas currently outside the urban containment boundary.
- Major development occurs on Treaty Settlement Land (TSL) within the City of Nanaimo. The Inucan lands south of the Chase River Town Centre are developed for single family residential, multiple family, retail and a commercial box centre. The land previously held by the Department of National Defence is developed for commercial, office and residential, to meet the needs of the expanding College-University.
- Major tracts of TSL land outside the City of Nanaimo are developed for single family residential.



City of Nanaimo  
**GROWTH STRATEGY REVIEW**  
 Scenario 3  
**REFOCUSED DOWNTOWN**

Project 3101-008-01-01

29 June 2003

-  REGIONAL SERVICE CENTER
-  NEIGHBOURHOOD VILLAGE
-  COMMERCIAL CORRIDOR

## **7.6 SUMMARY AND CONCLUSIONS**

It was determined that the weaknesses of scenario 1 and 3 would be the strengths of scenario 2. For example, one of the weaknesses of scenario 1: status quo is the general lack of recognition of land use reality and the population forecast, housing demand and commercial trends, where scenario 2: refocused growth centres tries to acknowledge a future population which is significantly less than the capacity anticipated within the status quo growth centres.

A review of the characteristics of each of the scenarios, together with the assumptions, lead to a conclusion that scenario 2 ( or some sort of version of scenario 2) as an obvious choice to refocus the growth center concept. In essence what is happening now in Nanaimo is a weakly implemented growth centre concept, with the market largely ruling development. A refocusing of the growth center concept will concentrate development in areas with a regional function with the greatest ability to attract mixed land uses in an effort to create complete, compact communities.

### **City Staff Workshop**

In October, 2003 a Workshop was held with key City staff from various City departments including planning and economic development and the project team. The purpose of the workshop was to outline the Growth Centre Concept Assessment project, particularly the development of the three growth scenarios. Workshop discussion focussed on developing a consensus that Scenario 2: Refocused Growth Centre was the preferred concept and the policy implications of this preferred scenario. It was generally agreed at the workshop by City staff present that Scenario 2: Refocused Growth Centres was the preferred option. The results of the discussion at the City Staff workshop has been used to help formulate the recommendations for policy change contained in section 9.0 of this report.

Following the staff workshop, it was determined that a sensitivity analysis of the forecasted population and subsequent residential and commercial trends analysis would be advantageous. This was carried out by the project team in order:

- to establish some parameters on the growth projections provided in the Technical Background and
- to determine the potential impact of varying population growth scenarios for the City of Nanaimo on future needs for housing types, as well as retail commercial and office floor area.

The results of the sensitivity analysis are provided in Section 8.0.

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## 8.0 Sensitivity Analysis

The City of Nanaimo has requested a sensitivity analysis to determine the potential impact of varying population growth alternatives for the City of Nanaimo on future needs for housing (Urban Futures Incorporated), as well as retail-commercial and office floor area (Urbanics Consultants Ltd.).

### 8.1 SETTING THE PARAMETERS

Two alternatives were developed for sensitivity analysis based on historical pattern of net migration to the Regional District and the City of Nanaimo. Rather than following a popular methodology of the sensitivity analysis generated by an arbitrary range of variance (i.e. the population varying by plus or minus ten percent by 2031), each alternative is characterized functionally by one of three distinct historical periods of net migration to the Regional District. Each of these periods generally follows part of the cycles of provincial economic activity:

- the late 1980's and early 1990's are characterized by rapid economic expansion and net migration to the province (from both domestic and international sources), and
- the more recent period being characterized by both slow economic and population growth.

Figure 8.1 illustrates each of the periods which drive the sensitivity analysis.

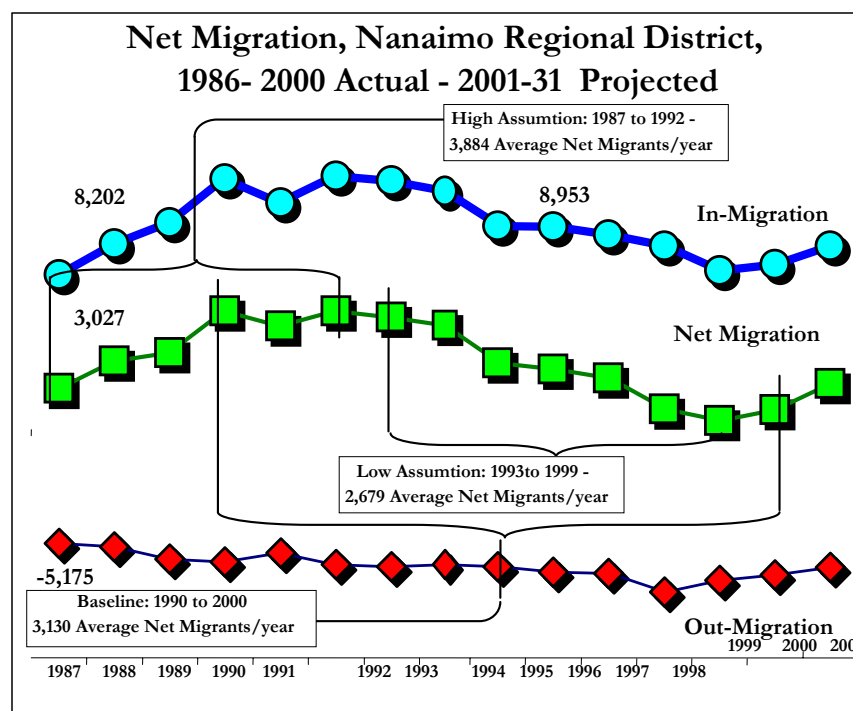


Figure 8.1

Over the projection period (2001 to 2031) it was assumed that net migration to the Regional District would achieve these alternative high or low levels by 2010 and that the age profile of net migrants would be represented by the average profile experienced over the past decade. The migration levels assumed by 2010 for each alternative are as follows:

- **Baseline** – 1990 to 2000 average annual net migration of 3,130 people
- **High Migration Alternative** – 1987 to 1992 average annual net migration of 3,884
- **Low Migration Alternative** – 1993 to 1999 average annual net migration of 2,679 people.

In stepping down to the City from the regional level, it was further assumed that under the high migration alternative each age group would achieve a two percent increase in its share of net migration to the Regional District over the projection period. As both the District and City grow it is reasonable to assume that the City of Nanaimo will further establish itself as the administrative and population centre for the Regional District and capture a greater share of the Regional District's employment and population.

## 8.2 POPULATION RESULTS

Around the baseline of the City growing to 113,923 residents over the next three decades, if the level of net migration returned to the period of rapid growth seen between 1987 and 1992, the City of Nanaimo would achieve a population of 129,581 people by 2031. This represents growth of 69 percent or 52,689 new residents. By 2031 this would result in the high migration scenario being roughly 14 percent greater than the baseline population projection.

Conversely, if the future flow of net migrants was characterized by the 1993 to 1999 period of low provincial and regional net migration, the City would achieve a population of 104,182 residents by 2031. This represents growth of 35 percent or 27,290 new residents in the City over the next three decades. By 2031 this would result the City's population being roughly nine percent below that of the baseline projection.

Therefore, depending on the magnitude of future net migration to the District and City, the variance in projected population would reasonably range between 104,200 and 129,600 residents by 2031. This represents a variance of between fourteen and nine percent around the baseline of 113,900 residents in the City of Nanaimo by 2031.

Population results for the sensitivity analysis are shown in Table 8.1 and Figure 8.2.

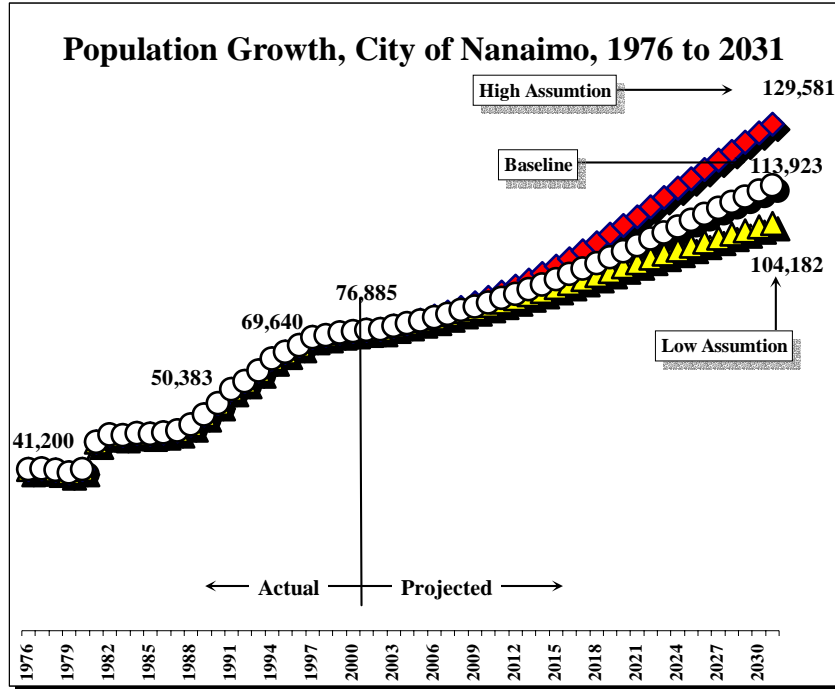


Figure 8.2

Table 8.1  
 Population Growth Alternatives

City of Nanaimo & Regional District of Nanaimo							
	2002	2006	2011	2016	2021	2026	2031
City of Nanaimo							
Low Migration	77,139	80,110	84,320	89,153	94,582	100,104	104,957
Baseline	77,139	80,181	85,032	91,154	98,556	106,529	113,923
High Migration	77,139	80,494	86,658	95,175	105,966	117,976	129,581
RDN							
Low Migration	134,786	141,379	150,788	161,814	174,191	186,313	196,944
Baseline	134,786	141,898	153,172	167,432	184,508	201,988	218,019
High Migration	134,786	142,671	156,736	175,754	199,370	224,174	247,673

*Source: Urban Futures Inc.*

### 8.3 HOUSING IMPLICATIONS

Given the age specific profile of net migration and the age specific profile of household maintainership used in household occupancy demand projections<sup>1</sup>, sensitivity analysis based on different net migration scenarios results in different scenarios for household occupancy demand. For example, relative to the baseline projection of the City adding 37,031 residents (48 percent growth) and 18,812 new dwelling units (58 percent) over the coming three decades, the high population scenario (69 percent population growth) would result in total housing demand growing by 75 percent or 24,337 new units over the next three decades. While this represents a 14 percent difference in population, there is only an 11 percent difference in total household occupancy demand.

Similarly, the low migration assumption that results in nine percent fewer residents in the City by 2031 than the baseline projection generates projected household occupancy demand, seven percent smaller than that seen in the baseline projection.

The variance between the population and housing scenarios results from the age specific profile of migration being heavily weighted to the under 45 population. These groups are characterized by lower household maintainer rates which result in smaller variance around the baseline housing projection relative to the variance seen around the population scenarios. To further illustrate this demographic impact, if the city's migration profile was more heavily weighted towards older age groups (where people are more likely to be household maintainers) the variance between the scenarios would have moved in the opposite direction, with the variance between the 2031 household scenarios being greater than that of the population.

Table 8.2 outlines forecasted population and number of households based on the sensitivity analysis, as well as the growth rate and variance to the baseline to 2031.

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<sup>1</sup> For further information on the age specific pattern of household maintainership or occupancy demand projections for the City please see [City of Nanaimo Five-Year Official Community Plan Review Technical Background Document](#), March 2003

**Table 8.2**  
**Forecasted Population and Number of Households**

Projection		Population	Households
Baseline	2001	76,892	32,633
	2031	113,923	51,446
High	2001	129,581	56,970
	2031	104,182	47,925
Low	2001	104,182	47,925
	2031	104,182	47,925
<b>Sensitivity</b>			
2001 - 2031 Growth			
	Baseline	48%	58%
	High	69%	75%
	Low	35%	47%
<b>Sensitivity</b>			
2001 - 2031 Variance			
	High	14%	11%
	Low	-9%	-7%

## 8.4 RETAIL-COMMERCIAL FLOOR AREA NEEDS

The revised City of Nanaimo retail trade area population growth forecasts by trade area sub-zone and scenario are summarized below in Table 8.3.

**Table 8.3**  
**City of Nanaimo Retail Trade Area Population**

Alternative/Zone	Population		
	2006	2021	2031
<b><u>Baseline</u></b>			
Primary Zone	169,500	231,500	275,400
Secondary Zone	154,600	190,400	214,500
Tertiary Zone	<u>110,000</u>	<u>159,300</u>	<u>200,000</u>
<b>Total Trade Area</b>	<b>434,100</b>	<b>581,200</b>	<b>689,900</b>
<b><u>Low Migration</u></b>			
Primary Zone	167,500	222,100	252,700
Secondary Zone	154,000	184,200	203,500
Tertiary Zone	<u>108,700</u>	<u>155,100</u>	<u>189,100</u>
<b>Total Trade Area</b>	<b>430,200</b>	<b>561,400</b>	<b>645,300</b>
<b><u>High Migration</u></b>			
Primary Zone	170,200	246,500	309,400
Secondary Zone	156,500	198,600	228,200
Tertiary Zone	<u>110,000</u>	<u>166,500</u>	<u>211,100</u>
<b>Total Trade Area</b>	<b>436,700</b>	<b>611,600</b>	<b>748,700</b>
<b>Sources:</b>			
<i>Urbanics Consultants Ltd.</i>			
<i>Urban Futures' RDN population forecasts</i>			

The original “baseline” scenario forecast called for 2031 populations of: 300,413 (primary zone), 221,743 (secondary zone), and 220,114 (tertiary zone). While these figures are potentially achievable, they assume a somewhat higher rate of immigration into the RDN than the more conservative, revised baseline scenario outlined above.

Based on the trade area population growth alternatives outlined in Table 8.3, the following retail-commercial floor area needs for the City of Nanaimo are forecasted:

**Table 8.4**  
**Retail-Commercial Floor Area Forecast**

Scenario/Zone	Floor Area (sq. Ft.)		
	2006	2021	2031
<b><u>Baseline</u></b>			
DSTM	268,000	1,139,000	1,533,000
Total Retail & Service	412,000	1,752,000	2,358,000
<b><u>Low Migration</u></b>			
DSTM	247,000	1,037,000	1,337,000
Total Retail & Service	380,000	1,595,000	2,057,000
<b><u>High Migration</u></b>			
DSTM	283,000	1,295,000	1,793,000
Total Retail & Service	435,000	1,992,000	2,758,000
<b>Sources:</b> <i>Urbanics Consultants Ltd.</i> <i>Urban Futures' RDN population forecasts</i>			

This analysis is based on the following general assumptions:

- Required productivity rate (\$ per sq. ft.), for planning purposes, of \$280 per sq. ft. (adjusted from earlier figure of \$260 per sq. ft. to reflect increased sales targets of retailers and shopping centre owners);
- The City of Nanaimo will continue to be the primary regional-serving retail/service centre for the entire trade area and will maintain an overall retail market share of 65% by 2006, 55% by 2021, and 45% by 2031. The decreasing market capture reflects current and anticipated development potential within other trade area centres.

## 8.5 OFFICE FLOOR AREA NEEDS

The likely impact of such varying population growth scenarios on the City of Nanaimo's office floor area requirements has also been reviewed. A summary of this review is presented below:

**Table 8.5**  
**Forecast Office Floor Area Needs – Summary of Sensitivity Analysis**

	Required Floor Areas (Sq. Ft.)				
	2006	2011	2016	2021	2031
<b>Office Floor Area (sq. ft.)</b>					
<b><u>Downtown Nanaimo</u></b>					
Baseline	35,000	67,000	129,000	204,000	383,000
Low Migration	34,000	59,000	89,000	142,000	245,000
High Migration	56,000	103,000	192,000	304,000	578,000
<b><u>Other' City of Nanaimo</u></b>					
Baseline	120,000	209,000	345,000	508,000	843,000
Low Migration	119,000	199,000	290,000	420,000	634,000
High Migration	147,000	257,000	433,000	654,000	1,135,000
<b>Sources:</b>					
<i>Urban Futures' population forecasts.</i>					
<i>Urbanics Consultants' office space ratios/projections.</i>					

The office floor area “requirements” outlined in the table are market-based projections of office floor area needs. Actual office space development within the downtown area, for example, may only be reached assuming increased utilization of Nanaimo’s downtown waterfront area.

In order to reflect differing levels of office development attraction for the City of Nanaimo in relation to population growth in the Nanaimo region, differing per capita office floor area ratios for the City of Nanaimo have been assumed for each of the defined alternatives, as outlined below:

**Table 8.6**  
**Forecast Office Floor Area Ratios by Growth Alternatives**

	Required Floor Areas (Sq. Ft.)				
	2006	2011	2016	2021	2031
<b><u>Per Capita Ratios</u></b>					
Baseline	25.0	25.0	25.5	26.0	26.5
Low Migration	25.0	25.0	25.0	25.5	25.5
High Migration	25.5	25.5	26.0	26.5	27.0
<b>Source:</b> <i>Urbanics Consultants Ltd.</i>					



## 8.6 SUMMARY

Based on the sensitivity analysis, the future population of Nanaimo at 2031 could potentially range between 104,200 and 129,600 people (baseline of 113,900). This represents a range of 27,300 to 52,700 new residents (compared to the baseline of 37,000). The implication of the sensitivity analysis for housing is a range between 15,300 and 24,300 additional dwelling units (compared to the baseline of 18,800 dwelling units.)

Based on the alternative population forecasts (“baseline”, “low migration”, and “high migration”), future retail-commercial and office floor area needs have been forecasted and are summarized below:

**Table 8.7**  
**Forecast Retail – Commercial & Office Floor Area Needs**  
**Summary of Sensitivity Analysis**

	Required Floor Areas (Sq. Ft.)		
	2006	2021	2031
<b>Retail Floor Area (Sq. Ft.)</b>			
<b><u>City of Nanaimo</u></b>			
Baseline	412,000	1,752,000	2,358,000
Low Migration	380,000	1,595,000	2,057,000
High Migration	435,000	1,992,000	2,758,000
<b>Office Floor Area (Sq. Ft.)</b>			
<b><u>Downtown Nanaimo</u></b>			
Baseline	35,000	204,000	383,000
Low Migration	34,000	142,000	245,000
High Migration	56,000	304,000	578,000
<b><u>Other City of Nanaimo</u></b>			
Baseline	120,000	508,000	843,000
Low Migration	119,000	420,000	634,000
High Migration	147,000	654,000	1,135,000
<b>Sources:</b>			
<i>Urban Futures' population forecasts.</i>			
<i>Urbanics Consultants' office space ratios/projections.</i>			

Tables detailing the population housing demand and commercial forecast for the three growth alternatives are contained in Appendix D.

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## 9.0 Recommendations for Policy Changes and Action

The analysis completed for the Growth Centre Assessment, specifically the forecast for population, housing demand and retail/office commercial floor area generated development of three scenarios for the growth centre concept: status quo, refocused, and downtown. Following discussion with City staff and considering the input from a stakeholder workshop and public information meetings, there appears to be support for a “refocused growth centre concept” for Plan Nanaimo. The details of the refocused growth centre concept were provided in Section 7 of this report. This section provides an outline of recommendations for policy change within Plan Nanaimo, as well as appropriate action items in an effort to move Plan Nanaimo towards Scenario 2, a refocused growth centre concept.

(Note: Throughout this section, to aid readability the *italicized text* refers to sections in Plan Nanaimo.)

### 9.1 OVERVIEW: REFOCUSING THE VISION OF PLAN NANAIMO

The current vision of Plan Nanaimo is to “fill up” within the established Urban Containment Boundary (UCB) and focus urban growth to Town Centres and Neighbourhood Villages within the UCB (page 0-5). Embracing scenario 2, the refocused growth centre concept, recommended in this report, should not be seen as a significant departure to the established vision in Plan Nanaimo but rather as a reconfiguration of the number, size and/or scale of the existing Growth Centre Concept in light of the analysis of population forecasts and implications for housing and commercial space. Specifically, the current OCP vision for 6 Town Centres and 11 Neighbourhood Villages are realigned to focus growth on 3 Regional Service Centres, and 8 Neighbourhood Villages. The central premise, however, to focus urban development within the City’s growth centres remains consistent. The fundamental changes to the current Growth Center Concept are:

- Reduction in number of primary growth centres (from 6 Town Centres to 3 Regional Service Centres)
- Reduction in number of secondary growth centres (from 11 Neighbourhood Villages to 8)
- Recognition of the speciality function of each of the Regional Service Centres
- Emphasis on the need to develop Area Structure Plans for each of the growth centres

## 9.2 GROWTH CENTRE CONCEPT POLICY REVIEW

### 1. Goal One: Build Complete, Viable Communities

*Goal One of Plan Nanaimo is to “build complete, viable communities”. This is defined in the Plan to mean the creation of “.... TownCentres, Neighbourhood Villages and neighbourhoods that collectively support a variety of lifestyle choices and that offer a pleasant, convenient, urban environment”. (page 1-1)*

**Recommendation:** Goal One of Plan Nanaimo is supported. It is suggested that the definition be modified to reflect “support for Regional Centres and Neighbourhood Villages that collectively support a variety of lifestyle choices and that offer a pleasant.....”

#### 1.1 Growth Centers

*Growth Centres in the Plan are defined as “...Town Centres, Regional Shopping Town Centres and Neighbourhood Villages where development will occur at urban densities.” (page 1-2)*

**Recommendation:** Growth Centres should be defined as a two-tiered hierarchy with Regional Centres serving a primary role and Neighbourhood Villages a secondary role (The Plan should make clear that Local Services Centres are not Growth Centres, but rather local, commercial areas, serving the everyday, convenience needs of the local neighbourhood which it serves). The Plan should continue to promote that Growth Centers be developed as complete communities with a broad range of residential, commercial, community and open space uses. It is further suggested that Regional Service Centers and Neighbourhood Villages be defined within the Glossary (page 0-9) of the Plan. The following provides suggested definitions:

- Regional Services Centres are defined as commercial and service areas which provide a focus of activity that draws beyond the existing City boundaries serving a regional function and provide a variety of residential, commercial, employment, and community activity. Three Regional Centres are supported in the Plan: Woodgrove, The Hospital, and Downtown Nanaimo.
- Neighbourhood Village Centres are defined as commercial and service areas which generally provide a focus of activity at the City-wide or neighbourhood-wide basis and provide a variety of residential, commercial, employment, and community activity. Neighbourhood Villages supported in the Plan are: Chase River, Northbrook, Bruce & Fifth Street, Northfield & Bowen, Country Club, Wellington Townsite.

##### 1.1.1 Objectives

*One of the listed objectives is “To provide for a variety of Growth Centres: Recognize and enhance the diversity and character of each Growth Centre.” (page 1-2). However, little policy development within the OCP appears to support this objective. Although there are sub-headings within Section 1.0 of the Plan for various Growth Centres, Chase River etc. which suggest that there are specific policies targeted for the Growth Centres, much of this is generic in nature and no clarity is provided with respect to the unique characteristics of each Town Centre. In fact, the Plan appears to suggest that each Growth*

*Centre will equally provide the same level of population and concentration of land uses and does not allow for distinction between the various growth centres.*

**Recommendation:** While this objective remains consistent with the refocused growth centre concept, it is suggested that policies be adopted in the Plan that promote the creation of a distinct identity for each of the proposed Growth Centres that capitalize on their unique character and exploit the diversity between the growth centers. Specifically, for the Regional Service Centres each of their unique regional functions and specialities should be acknowledged in the Plan as follows:

- Woodgrove as a regional shopping and service hub together with Rutherford with potential for high density residential and regional office development to complement existing retail commercial development.
- The Hospital as a mid-island medical service centre with potential for significant medium density housing, including a range of residential care facilities as well as associated specialty retail and office use.
- Downtown Nanaimo as the City's and region's art, culture administrative/office and festival/entertainment centre with significant potential for a range of higher density residential development capitalizing on the use of and proximity to the waterfront.

### ***1.1.2 Policies (page 1-2) acknowledge “Town Centres and Regional Shopping Centres”...***

**Recommendation:** References to “Town Centres and Regional Shopping Town Centres” should be revised to “Regional Service Centre.” Note: Similar references throughout Plan Nanaimo will require revision.

***Schedule A - Future Land Use and Mobility (appended to Plan) conceptually identify Neighbourhood Villages and allocate a land use designation for Town Centres. However, the Town Centres and Neighbourhood Village are not identified by name.***

**Recommendation:** The Growth Centres on Schedule A Future Land Use and Mobility should be revised to reflect the Refocused Growth Centres, as shown on Map 2 of this document. The exception is Rutherford Town Centre. Rutherford should be identified on the Plan's Schedule A as a commercial area, as part of Woodgrove Regional Service Centre and policies in the Plan should address Rutherford's role within the context of Woodgrove Regional Service Centre. It is further suggested that Schedule A include the names of the Growth Centres. Alternatively, a separate map can be provided within Section 1 of the Plan to conceptually identify the location and extent of the various growth centres. (Note: It is also suggested that Schedule A be revised to clearly distinguish between Parkway Intersections and Neighbourhood Villages.)

### ***1.1.2.2 Town Centre and Regional Shopping Town Centre Designation (page 1-4)***

*Generally, policies in this section are supported as consistent with the refocused vision, particularly the commitment to develop “Structure Plans” and the required content identified for each of the Structure Plans.*

**Recommendation:** It is suggested that priority be given by the City to the preparation of Structure Plans for each of the three Regional Service Centres. While it is recognized that a Structure Plan has been prepared for the Woodgrove area and there is an adopted Downtown Plan, these documents should be revisited in light of the refocused vision for the growth centre concept. In particular, a Structure Plan for Woodgrove should consider the land uses and spatial relationship of Rutherford commercial area. In addition, it is recommended that the Plan require Structure Plans to identify land uses and policies which focus on the unique attributes of each of the Regional Service Centre.

***Policy 1.1.2.2.5 (page 1-5)***

*This policy establishes target populations of between 5,000 and 10,000 people for Town Centres. With the refocusing of 6 Town Centres to 3 Regional Service Centres, the target populations of Structure Plan is better aligned with the baseline projection of 37,000 people to 2031, undertaken as part of the technical analysis. However, the policy remains prescriptive, and does not recognize whether or not there is the capacity within each growth centre to accommodate the target population and associated land use. Nor does it provide the flexibility for growth centres to recognize their uniqueness by, for example, allocating more or less residential land.*

**Recommendation:** While the target population is generally supported, it is recommended that this policy be rewritten to be less prescriptive to take into account the capacity of the growth centres' identified land base to accommodate a full range of land uses including residential, commercial, community and open space. The Structure Plan should be prepared in a manner to demonstrate not only the allocation of various land uses but also what can be reasonably accommodated. This calculation of capacity can then be compared to the forecast of population, housing demand, and retail/office commercial space.

***Chase River Town Centre...Woodgrove Regional Shopping Town Centre (page 1-6 to 1-11)***

*This section of the Plan provides additional policies with respect to the six Town Centres.*

**Recommendation:** It is suggested that this Section to be revised to clarify refocused definition of Growth Centres. For example, Chase River Town Centre to be identified as Chase River Neighbourhood Village, Downtown Town Center revised to Downtown Nanaimo, and Townsite Town Centre revised to Hospital Regional Service Centre. In addition, consideration should be given to developing policies for Woodgrove Regional Service Centre (RSC), such that Rutherford Mall continues to be recognized as the "core district" but within a larger, geographic context of the Woodgrove RSC.

***Policy 1.1.2.3 Neighbourhood Village Designation: Bruce and Eight Street.....Southside (page 1-15)***

*This section of the Plan provides additional policies with respect to the Plan's 11 neighbourhood villages.*

**Recommendation:** It is suggested that the following eight Neighbourhood Villages be supported:

- Country Club
- Chase River
- Wellington Townsite (North Wellington)

- Northfeild and Bowen
- Northbrook
- Terminal Park
- Bruce and Fifth Street
- Second Street (Wakesiah and Jinglepot)

The following three are eliminated:

- Sealand
- Southside (Tenth)
- Southend (Haliburton)

And finally, the following neighbourhood villages be scaled back to serve the function of large, local service areas:

- Bruce and Eighth
- Departure Bay

### **9.3 OTHER POLICY INITIATIVES**

There are a number of other policy initiatives in Plan Nanaimo that should be received in light of the findings of this report. These include:

#### **Urban Containment Boundary (UCB)**

One of the foundations of Plan Nanaimo is the establishment of an Urban Containment Boundary as a means of protecting rural lands from urban uses (page 0-5). Policies within the Plan, however, include both designated Neighbourhood and Suburban Neighbourhood land within the UCB. While urban growth is directed to growth centres, the extent of land to accommodate low density residential development, outside of growth centres but still within the UCB renders the UCB, as a concept, meaningless. Since such vast areas of low density residential lands with significant capacity (estimated to be in the order of 50,000 population) are available. How is urban growth contained given the population forecast?

**Recommendation:** It is suggested that the UCB be redrawn to exclude Suburban Neighbourhood designated land in an effort to focus growth within a more reasonable Urban Containment Boundary, in light of the forecast for population and housing demand.

#### **Existing Capacity and Land Densities**

While there are some introductory comments in the Plan with respect to existing capacity for residential growth, generally the capacity within City boundaries under various Plan designations is

unclear. “What amount of land is available and what is the capacity of the land to accommodate future population, or commercial uses, by geographic area, by growth centre, or by neighbourhood? Land densities are also frequently referred to in Plan Nanaimo. However, it is unclear whether these densities include or exclude non-residential lands. For example, does the “...target residential densities (gross) of 25 to 50 units per ha” (page 1 -11) within the Neighbourhood Village designation include non-residential lands? Since there is limited understanding of capacity of the land to accommodate various land uses, there is a significant challenge in attempting to tie target land densities to land capacity.

**Recommendation:** It is suggested that research be undertaken to determine the current level of development within the UCB and specifically designated growth centres, together with an assessment of vacant and underdeveloped land to determine ultimate capacity. (i.e. What is the current level of development? and What can be accommodated? ) What is existing and what could be reasonably accommodated should be clarified in order to refine policies surrounding ultimate land use and density.



# APPENDICES

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## APPENDIX A

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### DETAILED NUMERIC OUTPUT OF POPULATION AND HOUSING PROJECTIONS



### The City of Nanaimo, Population by Age 2001 to 2031

Total	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
0..4	3,574	3,474	3,461	3,458	3,448	3,433	3,463	3,498	3,544	3,599	3,660	3,725	3,791	3,858	3,924	3,989
5..9	4,594	4,388	4,272	4,161	4,096	4,041	4,024	4,044	4,075	4,099	4,119	4,182	4,252	4,331	4,419	4,513
10..14	5,013	5,035	4,998	5,006	4,956	4,946	4,808	4,719	4,639	4,604	4,579	4,592	4,643	4,704	4,756	4,805
15..19	5,362	5,173	5,236	5,251	5,259	5,257	5,340	5,330	5,368	5,348	5,367	5,259	5,201	5,152	5,147	5,152
20..24	5,421	5,506	5,431	5,361	5,328	5,285	5,198	5,303	5,361	5,415	5,457	5,585	5,623	5,709	5,736	5,803
25..29	4,198	4,240	4,488	4,751	4,980	5,211	5,415	5,378	5,350	5,358	5,356	5,310	5,456	5,557	5,652	5,737
30..34	4,544	4,431	4,279	4,101	4,013	4,015	4,093	4,334	4,593	4,817	5,044	5,244	5,203	5,171	5,177	5,172
35..39	5,715	5,443	5,180	4,909	4,727	4,552	4,424	4,275	4,097	4,009	4,011	4,088	4,328	4,586	4,808	5,034
40..44	6,447	6,423	6,312	6,326	6,226	6,029	5,793	5,553	5,306	5,148	4,996	4,891	4,764	4,610	4,544	4,568
45..49	6,452	6,628	6,787	6,837	6,865	6,891	6,906	6,817	6,854	6,776	6,603	6,393	6,177	5,955	5,820	5,692
50..54	5,711	5,854	6,152	6,420	6,589	6,778	6,994	7,167	7,234	7,279	7,322	7,355	7,285	7,338	7,279	7,125
55..59	4,019	4,432	4,739	5,107	5,559	5,932	6,103	6,407	6,684	6,864	7,063	7,288	7,472	7,550	7,609	7,664
60..64	3,341	3,447	3,641	3,861	4,076	4,320	4,748	5,058	5,425	5,874	6,246	6,425	6,731	7,012	7,199	7,406
65..69	3,115	3,145	3,173	3,251	3,368	3,514	3,639	3,835	4,056	4,272	4,517	4,936	5,244	5,604	6,039	6,402
70..74	3,224	3,177	3,225	3,139	3,062	3,050	3,099	3,136	3,216	3,332	3,477	3,601	3,790	4,001	4,210	4,445
75..79	2,849	2,871	2,818	2,826	2,824	2,824	2,792	2,837	2,769	2,708	2,705	2,754	2,794	2,866	2,968	3,098
80..84	1,884	1,974	2,075	2,184	2,214	2,211	2,231	2,192	2,199	2,202	2,202	2,178	2,213	2,161	2,118	2,118
85..89	1,003	1,040	1,064	1,060	1,155	1,252	1,312	1,379	1,445	1,467	1,464	1,474	1,449	1,455	1,461	1,460
90 plus	422	454	519	580	618	637	668	707	726	788	844	880	920	949	983	1,000
<b>all ages</b>	<b>76,885</b>	<b>77,133</b>	<b>77,850</b>	<b>78,589</b>	<b>79,364</b>	<b>80,181</b>	<b>81,051</b>	<b>81,969</b>	<b>82,939</b>	<b>83,958</b>	<b>85,032</b>	<b>86,157</b>	<b>87,338</b>	<b>88,568</b>	<b>89,850</b>	<b>91,181</b>

Total	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
0..4	4,052	4,116	4,179	4,243	4,309	4,378	4,441	4,501	4,559	4,616	4,673	4,731	4,791	4,852	4,915
5..9	4,611	4,711	4,811	4,911	5,011	5,110	5,202	5,287	5,366	5,439	5,507	5,571	5,631	5,688	5,745
10..14	4,897	4,994	5,102	5,218	5,342	5,469	5,593	5,713	5,826	5,931	6,030	6,122	6,207	6,286	6,359
15..19	5,193	5,272	5,361	5,443	5,520	5,642	5,762	5,886	6,014	6,143	6,271	6,395	6,514	6,627	6,732
20..24	5,742	5,730	5,727	5,769	5,821	5,911	6,028	6,145	6,244	6,330	6,452	6,572	6,697	6,824	6,953
25..29	5,907	5,985	6,111	6,180	6,288	6,270	6,296	6,322	6,385	6,449	6,540	6,657	6,774	6,874	6,961
30..34	5,123	5,265	5,362	5,453	5,534	5,699	5,776	5,904	5,977	6,087	6,070	6,096	6,122	6,185	6,249
35..39	5,232	5,192	5,160	5,165	5,160	5,112	5,251	5,344	5,431	5,509	5,674	5,750	5,877	5,949	6,059
40..44	4,666	4,926	5,204	5,447	5,694	5,914	5,892	5,873	5,886	5,884	5,836	5,974	6,065	6,152	6,229
45..49	5,609	5,505	5,374	5,332	5,378	5,498	5,774	6,062	6,313	6,561	6,779	6,757	6,738	6,750	6,749
50..54	6,935	6,740	6,538	6,423	6,315	6,251	6,164	6,047	6,013	6,062	6,180	6,451	6,735	6,981	7,225
55..59	7,710	7,657	7,723	7,679	7,543	7,373	7,194	7,007	6,901	6,799	6,735	6,650	6,536	6,503	6,549
60..64	7,634	7,826	7,915	7,987	8,055	8,115	8,077	8,149	8,113	7,985	7,821	7,649	7,470	7,369	7,272
65..69	6,583	6,884	7,164	7,354	7,563	7,791	7,984	8,075	8,149	8,216	8,273	8,238	8,306	8,271	8,149
70..74	4,842	5,136	5,474	5,881	6,222	6,398	6,681	6,944	7,123	7,316	7,523	7,700	7,782	7,849	7,909
75..79	3,208	3,377	3,560	3,745	3,955	4,305	4,565	4,856	5,205	5,494	5,643	5,882	6,108	6,260	6,425
80..84	2,159	2,197	2,253	2,332	2,434	2,520	2,655	2,797	2,944	3,109	3,386	3,591	3,814	4,081	4,301
85..89	1,443	1,466	1,432	1,406	1,408	1,437	1,468	1,502	1,552	1,620	1,675	1,766	1,856	1,954	2,065
90 plus	1,014	1,012	1,025	1,034	1,033	1,024	1,031	1,015	1,004	1,006	1,018	1,042	1,051	1,071	1,108
<b>all ages</b>	<b>92,562</b>	<b>93,992</b>	<b>95,474</b>	<b>97,004</b>	<b>98,584</b>	<b>100,219</b>	<b>101,834</b>	<b>103,430</b>	<b>105,004</b>	<b>106,559</b>	<b>108,087</b>	<b>109,594</b>	<b>111,073</b>	<b>112,526</b>	<b>113,954</b>

**The City of Nanaimo, Housing Occupancy Demand 2001 to 2031**

	Total				Owned				Rental			
	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment
2001	32,630	20,320	5,650	6,660	21,790	17,960	2,430	1,400	10,840	2,360	3,220	5,260
2002	33,010	20,570	5,700	6,740	22,110	18,220	2,470	1,420	10,900	2,350	3,230	5,320
2003	33,510	20,900	5,760	6,850	22,510	18,540	2,520	1,450	11,000	2,360	3,240	5,400
2004	34,000	21,230	5,820	6,950	22,910	18,870	2,560	1,480	11,090	2,360	3,260	5,470
2005	34,490	21,560	5,890	7,040	23,300	19,190	2,610	1,500	11,190	2,370	3,280	5,540
2006	34,990	21,890	5,960	7,140	23,700	19,510	2,660	1,530	11,290	2,380	3,300	5,610
2007	35,540	22,250	6,040	7,250	24,130	19,850	2,720	1,560	11,410	2,400	3,320	5,690
2008	36,090	22,600	6,130	7,360	24,560	20,180	2,780	1,600	11,530	2,420	3,350	5,760
2009	36,610	22,950	6,200	7,460	24,980	20,520	2,830	1,630	11,630	2,430	3,370	5,830
2010	37,180	23,330	6,290	7,560	25,420	20,870	2,890	1,660	11,760	2,460	3,400	5,900
2011	37,760	23,710	6,380	7,670	25,870	21,220	2,950	1,700	11,890	2,490	3,430	5,970
2012	38,390	24,110	6,480	7,800	26,350	21,590	3,020	1,740	12,040	2,520	3,460	6,060
2013	39,010	24,510	6,570	7,930	26,820	21,960	3,080	1,780	12,190	2,550	3,490	6,150
2014	39,620	24,900	6,660	8,060	27,280	22,320	3,140	1,820	12,340	2,580	3,520	6,240
2015	40,260	25,310	6,760	8,190	27,770	22,700	3,210	1,860	12,490	2,610	3,550	6,330
2016	40,920	25,730	6,860	8,330	28,270	23,090	3,280	1,900	12,650	2,640	3,580	6,430
2017	41,610	26,170	6,970	8,470	28,800	23,490	3,360	1,950	12,810	2,680	3,610	6,520
2018	42,280	26,590	7,080	8,610	29,310	23,880	3,440	1,990	12,970	2,710	3,640	6,620
2019	42,950	27,010	7,190	8,750	29,810	24,270	3,510	2,030	13,140	2,740	3,680	6,720
2020	43,680	27,460	7,310	8,910	30,350	24,680	3,590	2,080	13,330	2,780	3,720	6,830
2021	44,410	27,900	7,440	9,070	30,870	25,080	3,670	2,120	13,540	2,820	3,770	6,950
2022	45,160	28,340	7,580	9,240	31,400	25,490	3,750	2,160	13,760	2,850	3,830	7,080
2023	45,890	28,750	7,710	9,430	31,900	25,860	3,830	2,210	13,990	2,890	3,880	7,220
2024	46,610	29,150	7,850	9,610	32,390	26,230	3,910	2,250	14,220	2,920	3,940	7,360
2025	47,330	29,560	7,980	9,790	32,870	26,600	3,980	2,290	14,460	2,960	4,000	7,500
2026	48,040	29,940	8,120	9,980	33,340	26,950	4,060	2,330	14,700	2,990	4,060	7,650
2027	48,750	30,320	8,250	10,180	33,800	27,290	4,130	2,380	14,950	3,030	4,120	7,800
2028	49,450	30,690	8,390	10,370	34,230	27,620	4,190	2,420	15,220	3,070	4,200	7,950
2029	50,140	31,050	8,520	10,570	34,650	27,940	4,250	2,460	15,490	3,110	4,270	8,110
2030	50,810	31,400	8,660	10,750	35,050	28,250	4,310	2,490	15,760	3,150	4,350	8,260
2031	51,450	31,740	8,780	10,930	35,440	28,550	4,360	2,530	16,010	3,190	4,420	8,400

## APPENDIX B

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### INFORMATION SOURCES





# Appendix B

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## Information Sources

1. City of Nanaimo Strategic Planning, Progress Nanaimo, 1998, “Monitoring Achievement of Plan Nanaimo Goals”
2. Nanaimo Official Community Plan 5-Year Review “Phase One Results of the Preliminary Consultation Process”, Prepared for the City of Nanaimo by Urban Aspects Consulting Group, November 2001
3. “Nanaimo Downtown Plan”, adopted as part of the City of Nanaimo Official Community Plan on 2002 May 27 in Bylaw No. 6000.038.
4. “Analysis of the Downtown Residential Market in Nanaimo”, Prepared by: Coriolis Consulting Corp., April 2002, Draft.
5. Feasibility of New Market Housing In Downtown Nanaimo, prepared by John Jessup, January, 2001, Draft.
6. Action Plan for Downtown Residential Conversion, prepared by Mainstreet Designers et. al., January, 2001.
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8. Chase River Neighbourhood Plan, adopted as part of the City of Nanaimo Official Community Plan as Bylaw No. 6000.023
9. Regional District of Nanaimo, Growth Management Plan, Bylaw No. 985, adopted 1997, Consolidated November 9, 1999
10. City of Nanaimo, Official Community Plan, Bylaw No. 6000, adopted 1996, April 8, 2002.
11. City of Nanaimo – Infrastructure Sector report (October 2001)
12. Mid-Island Industrial Land Use Study (April 1996)
13. City of Nanaimo – Construction Sector report (August 2001)
14. Downtown Nanaimo Business Attraction Study – Interim Report (January 31, 2002)
15. Woodgrove Regional Shopping Town Centre Structure Plan – Strategies and Scenarios (March 1997)
16. Westhill Development, Masterplan and Rezoning Proposal (Paril 1993)
17. Review of Development Standards (Coriolis Consulting Corp., June 1997)

### Information Sources

19. Regional District of Nanaimo, Economic Planning Strategy (G.E. Bridges & Associates Inc., February 1998)
20. Regional District of Nanaimo, 2000 Annual Report on Progress towards the Vision and Goals of the Growth Management Plan (April, 2001)
21. City of Nanaimo 1996 Retail Study (Coriolis Consulting Corp., 1996)
22. City of Nanaimo Retail Sector report (January 2001)
23. Home-Based Business Study Final Report (July 1997)
24. Vancouver Island Economic Developers Association – Investment Attraction Opportunities in the Marine Sector (November 2000)
25. City of Nanaimo Tourism Sector report (January 2002)
26. City of Nanaimo – Downtown Height and Density Study (Urban Forum Associates, April 1994)
27. City of Nanaimo Business Directory (Jan. 2002)
28. Summary of Building Permit Statistics (1980 to Jun, 2002)
29. City of Nanaimo, Zoning Bylaw (Bylaw No. 4000, 1993, consolidated April 2002)
30. Nanaimo Rental Housing Strategy (Kennedy Consulting Inc., October, 1990)
31. Nanaimo Housing Study, Discussion guide, (City Spaces Consulting Ltd., 1992)
32. Zoning layers (on CD-Rom)
33. 3 full colour maps (scale – 2.75 inches: 1 km.) outlining names of Growth Centres

## APPENDIX C

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### ISSUES MATRIX



<b>Question –</b>  <i>The questions being asked by staff, Council and the public in Nanaimo are ....</i>	<b>Issue –</b>  <i>The issue is....</i>	<b>Current OCP</b>  <i>Objective/Goal/ or Policy –</i>  <i>The existing OCP says the following about this issue...</i>	<b>Assessment QUANTITATIVE –</b>  <i>Our demographic analysis and subsequent assessment shows the following quantitative findings.....</i>	<b>Assessment QUALITATIVE –</b>  <i>Based on our analysis and understanding of growth dynamics, the following qualitative assessment can be made .....</i>	<b>Monitoring Indicator –</b>  <i>One way to measure (success of this goal/policy) is....</i>	<b>Implication for Scenario Development –</b>  <i>Factors to be considered in the development of different scenarios....</i>
<b>POPULATION CHANGE</b>						
<b>1. Based on the characteristics of existing population and those people likely to move to Nanaimo, what are the impacts on the multi-nodal growth concept?</b>	The need to plan for <u>both</u> a growing and changing population.	City planning policies have traditionally focused on growth and growth management, rather than change management.	One dominant aspect of change will be the significant aging of the City's population over the next three decades.  Population is changing: <ul style="list-style-type: none"> <li>• slower growth in the age groups under 55, and higher growth in the 55 plus age groups, relative to total population.</li> <li>• 65 to 79 age group will have greatest relative growth, increasing 40% over the next 30 years</li> <li>• most typical person in 2001 was 43 years old, by 2031 the most typical person will be 67</li> </ul>		Total population change over time, and age group profile.	Multi-nodal growth concept assumes a continuation of growth at historic rates i.e. ensuring sufficient supply of residential/commercial land given anticipated demand at historic rates.  Demographic analysis suggests reduction in number of growth centres or population targets within each growth centre to provide better match to population trends. (see further discussion below)
<b>POPULATION DISTRIBUTION</b>						
<b>2. Given historical and projected regional growth and the distribution of population between the City and the region, what are the implications for the growth centre concept?</b>	Regional District has experienced a relatively high growth rate over the last 25 years, compared to the City. (3.1% versus 2.5 % growth per annum)	Plan Nanaimo supports the Regional District's Growth Management Plan by encouraging growth within established growth centres. RDN's Growth management Plan supports a nodal community structure, strong urban containment and creation of complete communities.	Future Regional District growth trend is forecast to be low to moderate, in contrast to the relatively high growth rate in the past.  City currently has greater proportion of people in working stage of lifecycle (aged 15 to 34), compared to RDN which has greater proportion of people in pre- and retirement stages.	City must recognize that although the rest of the Regional District is growing more rapidly, it will continue to be the hub of population, administration, commercial, health and educational services within the region.  While the City offers more job opportunities, areas outside the City are attractive to pre and retirement age groups where proximity to employment centres are less critical.	Population growth within and outside City boundaries.	There are policy implications on a range of issues related to the development of growth centres <ul style="list-style-type: none"> <li>• including the size and composition of future housing demand within growth centres</li> <li>• the diversity of health and social services specifically, the City needs to recognize its role as a regional centre and be more responsive to changing population both within the City and Regional District.</li> </ul>

Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<b>POPULATION GROWTH</b>						
<p><b>3. What is the impact of growth and changing population (aging population) on growth centres in the City over the coming decades?</b></p>	<p>Net housing occupancy demand will grow more rapidly than total population over the next three decades.</p>	<p>The OCP assumes growth rates of 2 to 4%. Based on these growth rates, the OCP states that there is sufficient approved land to accommodate growth for the next 17 to 38 years – within Town Centres/ Neighbourhood Villages and zoned residential lands.</p>	<p>With an aging population and increasing household maintainer rates with age, the number of households in the region will increase faster than total population. (58% increase in dwelling demand vs. 48% increase in population)</p>	<p>The strong bias toward ground-oriented housing has implications for “target” densities within growth centres.</p>	<p>Census count of population and dwelling units. CMHC annual data on housing completions.</p>	<p>With so much capacity located outside the defined growth centres, the more prescriptive and detailed policy-oriented goals outlined in the OCP need to be reviewed and perhaps eliminated. An example of a prescriptive policy is that Town Centre core districts are 20 hectares with target residential densities of 100 to 150 units.</p>
<b>FORECAST OF DWELLING UNITS</b>						
<p><b>4. How does the availability of affordable single-family homes within the City and the bias towards suburban living affect the viability of the growth centre concept?</b></p>	<p>Over the long term, each of the growth centres, (six Town Centres and 11 neighbourhood villages) are expected to accommodate the majority of growth in Nanaimo.</p> <p>However, a significant amount of residentially zoned land <u>outside</u> the growth centres remain – it is estimated that there is enough land to accommodate over 50,000 people outside the growth centres.</p>	<p>OCP states that there is room for 50,000 more people in currently zoned residential lands, and room for 15,000 – 30,000 more people if targets for Town Centres are met, totalling 65,000 to 80,000 in additional population.</p> <p>Target populations within Town Centres are 5,000 to 10,000 people. With 6 designated Town Centres, a total Town Centre population of 30,000 to 60,000 is possible.</p> <p>Neighbourhood villages to be comprised of a population of 1,500 to 3,000 people. (This needs to be clarified by City staff)</p>	<p>City’s population projected to grow by 37,000 in next 30 years – an average of 1,235 people per year. (a 48% increase over 2001)</p> <p>Over the last 25 years, City population has grown an average of 2.6% per year; however, the regional population has grown faster than that of the City. (City’s share of regional population has dropped from 65 to 58%.)</p>	<p>The faster growth rate of the regional population and the City’s role as a regional retail and service centre on Vancouver Island indicate the need to re-examine the current hierarchy of defined “growth centres”.</p> <p>The 6 defined “Town Centres”, for example, serve dramatically different roles and function in very different ways – some of these (e.g. Woodgrove) have a distinctly <u>regional</u> service orientation – as compared to <u>city</u> based. These differences should be clarified through the use of more appropriate terms.</p>	<p>Number of dwelling units and commercial floor space developed within growth centres and outside growth centres.</p>	<p>Over the next 30 years, in projected population growth can be more than be accommodated in the growth centres. This suggests that the number of growth centres could be more focused, and/or the target populations for the growth centres be reduced (as reflected in residential density targets).</p> <p>The projected demand for ground oriented and apartment dwelling units suggest that the targets for each Town Centre for multi-family dwellings will not be achieved over the next 30 years. Target densities should be reduced or noted as flexible.</p> <p>Future policy should recognize that the majority of future housing demand will be for ground oriented units (90%).</p>

Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<b>HOUSING TYPE AND TENURE</b>						
<p><b>5. What will be the implications of an aging population on the composition or type of housing demand in the City over the coming decades?</b></p>	<p>Strong predisposition towards living in ground oriented accommodation through the lifecycle will lead to this continuing to be the dominant housing form over the coming decades.</p>	<p>OCP supports range of housing options in terms of tenure and type to accomplish goal of building complete communities within defined Town Centres.</p>	<p>Ground-oriented, owner-occupied dwellings dominate the lifecycle of housing occupancy in the City – only in the youngest and oldest age groups does this change where apartment living is more common. With an aging population and high household maintainer rates, the greatest absolute increase will be seen in ground oriented units (14,500 units as compared to 4,300 apartment units).</p>	<p>A significant amount of the City's housing capacity, in particular, single-family land, is located outside the defined growth centres. This again indicates that more reasonable and less prescriptive policies relating to the definitions &amp; characteristics of various growth centres need to be developed.</p>	<p>Housing starts by housing type and geographic location over time.</p>	<p>Target densities for growth centres assume high density residential living – such as apartments. The demand for apartment living (projected to be 4,300 units over 30 years) will not be sufficient to achieve target populations for all existing growth centres over the next 30 years. This suggests that the target densities for the growth centres be reduced and encourage densities in keeping with higher density <u>ground oriented</u> accommodation.</p>
<p><b>6. What is the impact of projected population growth on housing demand in the City over the coming decades?</b></p> <p><b>Are the population targets for the Town Centres achievable?</b></p>	<p>Population targets in growth centres, particularly town centres appear optimistic given historic development patterns and the propensity towards ground-oriented accommodation</p>	<p>Target densities and core/transition areas established in the OCP for Town Centres would provide 2000 – 3000 apartment units and 2500 townhouse units per Town Centre (or 4500 to 5500 multifamily units in total per Town Centre) for a total of 27,000 to 33,000 multifamily units.</p>	<p>Over next 30 years, there is projected demand for 18,600 additional private dwelling units, including: 11,400 single detached, 3,100 attached and 4,300 apartment units.</p>		<p>Building permits issued over time for single-family dwellings vs. multi-family permits within growth centre areas.</p>	<p>The projected demand for ground oriented and apartment dwelling units, suggests that the population and density targets for each Town Centre for multi-family dwellings are not achievable or realistic over the next 30 years. Target densities should be reduced to be more aligned with projected trends in population growth, change, and dwelling type demand.</p>

Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<b>RETAIL COMMERCIAL</b>						
<p><b>7. Based on current population and current development patterns what nodes are viable or are on the verge of being viable?</b></p>	<p>The historic pattern of commercial development in Nanaimo has established a linear pattern of development and decentralized concentrated development in the traditional downtown. The OCP appears to dismiss the existing, fundamental spatial patterns and structure of commercial development in Nanaimo.</p>	<p>Strives to create six, apparently equal Town Centres and eleven neighbourhood villages amongst an essentially continuous linear strip of commercial development. Each Town Centre is nominally identified as having some unique characteristics, however all are anticipated to foster the same level of residential density, commercial land uses etc. The OCP establishes a hierarchy based on Town Centres and Neighbourhood Villages, not taking into account the regional function served by some of the Town Centres.</p>	<p>Three employment sectors likely to see most significant growth to 2021: wholesale/retail trade, health/social services, accommodation/food services. This reflects a continuation of Nanaimo's role as a regional retail/service centre, and the aging of the population (i.e. the growth in health/social services sector).</p> <p>Based on population forecasts, it is estimated that the following retail floor space will be required: 37,000 sq.m. by 2006 (8% increase), 204,000 sq.m. by 2016 (42% increase) and 334, 000 sq.m. by 2031 (68% increase).</p>	<p>The City's location, existing commercial infrastructure, and other amenities, including Nanaimo Regional Hospital, will continue to make it the central/northern Vancouver Island centre for retail and service activity.</p> <p>Re-enforces role of Nanaimo as regional commercial and transportation hub and health centre. Also again indicates need to establish more clear "growth centre" hierarchy reflecting the more regional-service orientation of Woodgrove / Rutherford, Hospital, and Downtown nodes.</p>	<p>Commercial floor space by geographic location (i.e. growth centre) over time.</p>	<p>The OCP needs to recognize:</p> <ol style="list-style-type: none"> <li>1. The nearly continuous strip of highway commercial uses along the Island Highway is a function of the importance of this arterial road for the region which it serves. Woodgrove and Rutherford are in a very real sense a continuous regional-serving and primarily commercial node that should be considered as one and built upon as a base.</li> <li>2. The 6 defined Town Centres have very different character and serve distinctly different roles which the "Town Centre" "definition" does not take into account. Suggestion to distinguish three growth centres as "Regional Service Centres" areas – as the highest order of growth centres. <ul style="list-style-type: none"> <li>• Woodgrove/Rutherford (combined)</li> <li>• Hospital and</li> <li>• Downtown</li> </ul> </li> </ol>



Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<p><b>8. What are the upcoming commercial/office/enterprise trends and how might they impact the viability of the growth centre concept?</b></p>	<p>Retail trends towards big box development in suburban areas which require large land area for building mass and parking and generate significant traffic.</p>	<p>1.1.2.1.5 Policy: “New retail, commercial and medium/high density residential development projects will be directed to Growth Centres.”</p>	<p>The rate of retail development is a function of population growth both within and outside the City and economic conditions e.g. disposable income.</p>	<p>National trend toward large/new format (i.e. “box”) retail of all sizes, from small box through medium and large (generally over 75,000 sq. ft.) will continue as retailers seek the associated advantages of increased operational efficiency, locating in easily accessible “one-stop shopping” destinations, and providing increased convenience /selection for consumers. Trend toward redeveloping existing shopping centres to accommodate these new retail forms will continue as retailers seek higher visibility locations, particularly in municipalities such as Nanaimo, whose role as a regional service centre is so closely tied to its orientation around the Island Highway.</p>	<p>Location, size and density of commercial building permits on an area by area basis.</p>	<p>Retail trends supports: The realignment of Woodgrove and Rutherford “Town Centres” into a single “Regional Service Centre” This represents a significant means of recognizing and building on the current infrastructure a reduction in the number of Growth Centres to foster concentrated effort to attract commercial tenants to the three Regional Services Centres, namely, Woodgrove/Rutherford, Downtown and Hospital</p>
<p><b>9. What is the optimal geographical distribution of retail/service commercial space between Town Centres?</b></p>	<p>The northern sector has attracted more retail/service commercial development than other areas of the City.</p>	<p>The OCP established a two-tiered hierarchy of growth centres: Town Centres and Neighbourhood Villages. In addition, the OCP strives to create six, apparently equal Town Centres.</p>	<p>The North sector of the City continues to account for the largest proportion of retail development – accounting for over 80% of new retail/service space development from 1996 to 2001. This has come largely at the expense of other sectors of the City  North sector of the City has dominated distribution of retail space due to: superior orientation relative to Island Highway (gateway to the City for the majority of the regional population), existing retail infrastructure centred on Woodgrove and trend to big-box format.</p>	<p>The North sector will continue to be the primary centre of retail commercial development. However, there is a need to recognize the importance of a strong downtown area (also more appropriately defined as a Regional Service Centre, albeit of a different character) and the potential for further growth – likely in the medium to long term – in the City’s South sector.  It is important to recognize that some of the commercial growth in the North would not have occurred Downtown, regardless of the economic climate – the nature of development in the North requires large sites, easy highway access, etc.</p>		<p>Suggests that each sector has its own unique characteristics/specialization. The OCP should capitalize on the different character of each of the Town Centres within different sectors of the City:  Northern sector – Regional Retail Service Centre – Woodgrove/Rutherford,  Central sector – Regional Hospital Centre for health services  Southern sector - Downtown Centre for Administrative/Cultural services for the City and Regional.</p>

Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<p><b>10. Why are corner stores disappearing, local branches of national banks closing – does this signal the end to neighbourhood villages?</b></p>	<p>Neighbourhood Villages have difficulty retaining/attracting neighbourhood-based businesses.</p>	<p>Policy 1.1.2.3.6, 6: “Neighbourhood Village Concept plans should contain shopping and services including healthcare intended primarily to serve neighbourhood residents”</p> <p>The OCP’s growth centre concept establishes a hierarchy of Centres within particular areas of the City: Town Centres, Neighbourhood Villages and Local Service Centres.</p>		<p>Reflective of change in commercial/retail landscape towards larger centres of activity and the ability to conduct “one-stop shopping”.</p> <p>Change in Neighbourhood Village centres is not a result of limited population catchment areas (they historically survived in the City with fewer people) but rather an issue of how we have changed and conduct our daily business (i.e. desire for one stop shopping, increased mobility and access – not limited to walking distance for services etc.)</p>		<p>The OCP needs to recognize the true hierarchy of retail/commercial shopping centres/complexes – from:</p> <p>convenience-oriented “Local Service” centres, to</p> <p>“Neighbourhood Village”-type developments (including neighbourhood shopping centres), and “Community Centres” (including community-oriented shopping) such as “Country Club” and finally</p> <p>larger “Regional Service Centres” offering a more comprehensive, regional service delivery centre.</p> <p>Focus Neighbourhood Villages to key sites with potential additional amenities, recreation facilities, and sufficient population to support commercial activity to generate thresholds of demand to support a diversity of uses. For example, realign:</p> <p>Sealand NV as LSC</p> <p>Jingle Pot LSC as NV.</p>
<b>OFFICE COMMERCIAL</b>						
<p><b>11. What is the optimal geographical distribution of office commercial space between Town Centres?</b></p>	<p>There is not sufficient energy/planning given to the optimal distribution of employment-based commercial uses in the current OCP.</p>		<p>Rate of commercial office development activity began to increase following 1994, responding to high levels of local/regional population growth. (increasing from 19.1 square feet office space per capita in 1994 to 23.9 in 2000)</p> <p>This increased ratio is reflective of the City of Nanaimo’s historically increasing role as a regional service (and employment) centre.</p>			<p>A more clearly defined hierarchy of “growth centres”, respecting the more regional-serving character of the Woodgrove / Rutherford, Hospital, and Downtown areas (currently defined simply as “Town Centres”) is particularly crucial for the effective distribution of future office uses. (For example, lands in the northwest quadrant of the Hammond Bay Road/Island Highway intersection would be well-suited to office development.)</p>

Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<b>12. What can be done to foster the revitalization of Downtown Nanaimo?</b>	Decline of the Downtown as a commercial and residential centre has resulted due to a greater focus of development activity in other sectors of the City.	<p>Policy 1.1.2.2. 28 - 34 establish Downtown as a growth centre, similar to the five other growth centres.</p> <p>The OCP does not establish priority for Downtown within growth centre concept, yet subsequent planning work has emphasized importance of establishing a vital, healthy Downtown. e.g. Downtown Plan</p>	<p>While amount of office floor space Downtown has increased between 1984 and 2000, Downtown's share of the City's office space has declined from 61% to 46% over the same time period – other areas of the City are seen as more attractive for office development.</p> <p>Based on population forecast, it is estimated that 11,000 sq.m. of office floor space will be needed by 2006 (6% increase), 27,000 sq.m by 2016 (16% increase) and 72,000 sq.m. by 2031 (42% increase).</p>	While decline in Downtown's share of office space is expected as Nanaimo grows, rate of decline is significant. This may reflect other factors such as, difficult access, limited vacant land, tendency for regional-serving office space users to locate further north for better highway access and regional population base.	Commercial floor space and residential unit development in Downtown versus other growth centres.	<p>Consider reduction in number of growth centres and limiting options for office development to select nodes, specifically downtown Nanaimo. Consider allowing full variety of commercial development downtown; offices outside of Downtown could be limited to auxiliary offices playing a supportive role to the primary operation.</p> <p>For the Downtown, policy objectives should centre around:</p> <p>increased connectivity to a vastly underutilized waterfront</p> <p>attraction of retail/commercial uses having a tourist, festival, entertainment, specialty, or cultural orientation.</p>
<b>COMMUNITY SPECIFIC FACTORS</b>						
<b>13. How does Nanaimo as a mid-island medical service delivery centre impact the viability of Growth Centres?</b>	Nanaimo is a mid-island medical service delivery centre.	Policy: 1.1.2.2.35 Nanaimo Regional Hospital falls within the Townsite Town Centre and recognizes the hospital area as the core district for office uses related to the hospital. (Townsite is also referred to as Hospital Town Centre)		<p>Medical services only play a factor for those 70 plus as an attractor?</p> <p>Island Hwy provides easy access to hospital facilities, making it not necessary to live in Nanaimo in order to access the health services offered.</p>		Clarify name as "Hospital Town Centre" which more clearly described this Town Centre's role as specializing in health care related commercial services. Place emphasis that this Town Centre has specialized role, providing health and health care related services. Supports conclusions in row.....
<b>14. How does Malaspina University-College and future expansion plans impact the viability of Growth Centres?</b>	Malaspina University-College is a predominant land use and provides significant educational and research component to the City's economy and social fabric. The College has future expansion plans.	Policy: 1.5.2.4 Malaspina College is designated Research, Education and Development Enterprise Area. Permitted uses: technology, research/development, education facilities, including administration and student residences and related service commercial and office uses. The area is not a "growth centre" - nearest is Bruce/Fifth Street Neighbourhood Village – the existing Harewood Mall.		<p>Assumed that student population is dispersed throughout Nanaimo or living outside the City and commuting via the Island Hwy. (This may be confirmed in an upcoming survey of students.)</p> <p>What may be likely is that Neighbourhood Villages in relatively close proximity to Malaspina may begin to see some specialty retail and eating/drinking facilities (e.g. cafes) catering to this student population.</p>	Housing starts within designated Enterprise Area.	None. As a result of dispersed student/faculty population, it is probable that College population alone does not justify creation of a Growth Centre in conjunction with Enterprise Area, such as a neighbourhood village centre. Proximity to Downtown and Bruce and Fifth Street Village Centre suggests Malaspina's supportive role towards established growth centres rather than additional.

Question	Issue	Current OCP	Assessment QUANTITATIVE	Assessment QUALITATIVE	Monitoring Indicator	Implication for Scenario Development
<p><b>15. How does the future Downtown Nanaimo to Downtown Vancouver foot ferry service impact the viability of Growth Centres?</b></p>	<p>Downtown Nanaimo to Downtown Vancouver foot ferry service</p>	<p>Policy: 1.1.2.2.28 - 34 Downtown Nanaimo is designated as a growth centre – the Downtown Town Centre with focus on a cultural/tourism, government centre.</p>		<p>Doubtful that the foot ferry service will make Nanaimo an attractive alternative to living in Lower Mainland sufficient to make any dramatic impact on residential growth. It may have a modest impact on increased tourism.</p>	<p>Passenger traffic over time.  Exit surveys.</p>	<p>None.</p>
<p><b>16. Due to extensive medical services, geographic location and lower housing prices, Nanaimo is attractive to retirees, how does this impact the viability of growth centres?</b></p>	<p>Nanaimo must become an attractive retirement community due to availability of medical services geographic location and lower housing prices.</p>	<p>Plan supports medical services hub function. Goal One of the OCP is to establish complete communities by offering a variety of lifestyle choices. This suggests housing for all age groups, including retirees, in terms of housing form, recreational, cultural opportunities etc. Plan stresses need for affordable housing.</p>		<p>Nanaimo must continue to have wide range of housing available, wide range of commercial services and continue to have available medical services.</p>	<p>Housing starts by type, tenure and geographic location.</p>	<p>No direct implications.</p>

## APPENDIX D

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SENSITIVITY ANALYSIS:  
DETAILED POPULATION FORECAST,  
HOUSING OCCUPANCY DEMAND AND  
COMMERCIAL (RETAIL AND OFFICE) FLOOR SPACE DEMAND



# Detailed Population Projections 2001 - 2031

## Base, High and Low Scenario

### The City of Nanaimo, Population by Age 2001 to 2031, Baseline Scenario

Total	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	Total	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
0..4	3,574	3,474	3,461	3,458	3,448	3,433	3,463	3,498	3,544	3,599	3,660	3,723	3,790	3,857	3,922	3,987	0..4	4,051	4,114	4,177	4,241	4,307	4,375	4,439	4,499	4,557	4,614	4,671	4,729	4,789	4,850	4,913
5..9	4,594	4,388	4,272	4,161	4,096	4,041	4,024	4,044	4,075	4,099	4,119	4,180	4,249	4,329	4,417	4,511	5..9	4,609	4,709	4,810	4,910	5,009	5,108	5,200	5,285	5,364	5,437	5,505	5,568	5,628	5,686	5,743
10..14	5,013	5,035	4,998	5,006	4,956	4,946	4,808	4,719	4,639	4,604	4,579	4,588	4,639	4,700	4,753	4,802	10..14	4,894	4,991	5,099	5,216	5,339	5,467	5,592	5,711	5,824	5,930	6,029	6,120	6,205	6,284	6,357
15..19	5,362	5,173	5,236	5,251	5,259	5,257	5,340	5,330	5,368	5,348	5,367	5,255	5,198	5,148	5,144	5,148	15..19	5,190	5,269	5,358	5,440	5,517	5,639	5,759	5,884	6,012	6,141	6,269	6,393	6,512	6,625	6,731
20..24	5,421	5,506	5,431	5,361	5,328	5,285	5,198	5,303	5,361	5,415	5,457	5,581	5,620	5,706	5,733	5,800	20..24	5,739	5,727	5,723	5,766	5,818	5,908	6,025	6,142	6,241	6,327	6,449	6,570	6,694	6,822	6,951
25..29	4,198	4,240	4,488	4,751	4,980	5,211	5,415	5,378	5,350	5,358	5,356	5,306	5,452	5,553	5,649	5,734	25..29	5,904	5,982	6,108	6,177	6,285	6,267	6,292	6,318	6,382	6,446	6,536	6,653	6,771	6,871	6,958
30..34	4,544	4,431	4,279	4,101	4,013	4,015	4,093	4,334	4,593	4,817	5,044	5,245	5,205	5,172	5,176	5,169	30..34	5,120	5,261	5,358	5,449	5,531	5,696	5,773	5,901	5,974	6,084	6,067	6,092	6,118	6,182	6,245
35..39	5,715	5,443	5,180	4,909	4,727	4,552	4,424	4,275	4,097	4,009	4,011	4,087	4,328	4,586	4,809	5,035	35..39	5,234	5,193	5,161	5,164	5,158	5,109	5,247	5,339	5,427	5,506	5,670	5,747	5,874	5,946	6,056
40..44	6,447	6,423	6,312	6,326	6,226	6,029	5,793	5,553	5,306	5,148	4,996	4,889	4,763	4,608	4,543	4,567	40..44	4,665	4,926	5,204	5,448	5,695	5,916	5,893	5,873	5,885	5,882	5,833	5,970	6,061	6,148	6,226
45..49	6,452	6,628	6,787	6,837	6,865	6,891	6,906	6,817	6,854	6,776	6,603	6,391	6,176	5,953	5,818	5,690	45..49	5,607	5,503	5,373	5,330	5,376	5,497	5,773	6,062	6,313	6,562	6,781	6,758	6,738	6,749	6,746
50..54	5,711	5,854	6,152	6,420	6,589	6,778	6,994	7,167	7,234	7,279	7,322	7,354	7,284	7,337	7,277	7,124	50..54	6,933	6,738	6,536	6,422	6,313	6,249	6,162	6,045	6,011	6,060	6,180	6,451	6,735	6,982	7,227
55..59	4,019	4,432	4,739	5,107	5,559	5,932	6,103	6,407	6,684	6,864	7,063	7,287	7,470	7,549	7,608	7,663	55..59	7,709	7,656	7,721	7,678	7,542	7,371	7,192	7,006	6,900	6,798	6,733	6,648	6,534	6,501	6,548
60..64	3,341	3,447	3,641	3,861	4,076	4,320	4,748	5,058	5,425	5,874	6,246	6,424	6,730	7,011	7,198	7,404	60..64	7,633	7,825	7,914	7,986	8,054	8,114	8,076	8,148	8,112	7,983	7,820	7,648	7,469	7,368	7,270
65..69	3,115	3,145	3,173	3,251	3,368	3,514	3,639	3,835	4,056	4,272	4,517	4,935	5,243	5,603	6,038	6,401	65..69	6,583	6,884	7,163	7,353	7,562	7,790	7,983	8,074	8,148	8,215	8,272	8,237	8,305	8,270	8,147
70..74	3,224	3,177	3,225	3,139	3,062	3,050	3,099	3,136	3,216	3,332	3,477	3,600	3,789	4,000	4,209	4,444	70..74	4,841	5,135	5,473	5,881	6,222	6,398	6,680	6,944	7,122	7,315	7,522	7,699	7,781	7,848	7,908
75..79	2,849	2,871	2,818	2,826	2,824	2,824	2,792	2,837	2,769	2,708	2,705	2,754	2,794	2,866	2,968	3,097	75..79	3,208	3,376	3,559	3,745	3,954	4,304	4,565	4,855	5,204	5,494	5,642	5,882	6,107	6,259	6,425
80..84	1,884	1,974	2,075	2,184	2,214	2,211	2,231	2,192	2,199	2,202	2,202	2,178	2,213	2,161	2,118	2,118	80..84	2,158	2,197	2,253	2,331	2,434	2,520	2,654	2,796	2,943	3,109	3,385	3,591	3,813	4,080	4,301
85..89	1,003	1,040	1,064	1,060	1,155	1,252	1,312	1,379	1,445	1,467	1,464	1,474	1,449	1,455	1,461	1,460	85..89	1,443	1,466	1,432	1,406	1,408	1,437	1,467	1,502	1,552	1,620	1,675	1,766	1,856	1,953	2,064
90 plus	422	454	519	580	618	637	668	707	726	788	844	880	920	949	983	1,000	90 plus	1,014	1,012	1,025	1,034	1,033	1,024	1,031	1,015	1,004	1,006	1,018	1,042	1,051	1,071	1,108
<b>all ages</b>	<b>76,885</b>	<b>77,133</b>	<b>77,850</b>	<b>78,589</b>	<b>79,364</b>	<b>80,181</b>	<b>81,051</b>	<b>81,969</b>	<b>82,939</b>	<b>83,958</b>	<b>85,032</b>	<b>86,131</b>	<b>87,312</b>	<b>88,542</b>	<b>89,823</b>	<b>91,154</b>	<b>all ages</b>	<b>92,535</b>	<b>93,964</b>	<b>95,446</b>	<b>96,975</b>	<b>98,556</b>	<b>100,190</b>	<b>101,805</b>	<b>103,400</b>	<b>104,975</b>	<b>106,529</b>	<b>108,057</b>	<b>109,564</b>	<b>111,043</b>	<b>112,496</b>	<b>113,923</b>

### The City of Nanaimo, Population by Age 2001 to 2031, High Migration Scenario

Total	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	Total	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
0..4	3,574	3,474	3,463	3,465	3,464	3,463	3,509	3,564	3,633	3,713	3,803	3,899	4,002	4,109	4,218	4,329	0..4	4,443	4,559	4,678	4,801	4,928	5,060	5,185	5,306	5,423	5,539	5,654	5,769	5,885	6,002	6,119
5..9	4,594	4,389	4,275	4,170	4,114	4,073	4,073	4,114	4,171	4,225	4,278	4,377	4,487	4,609	4,742	4,884	5..9	5,033	5,186	5,344	5,503	5,665	5,830	5,987	6,138	6,281	6,418	6,549	6,674	6,794	6,911	7,026
10..14	5,013	5,035	5,000	5,012	4,971	4,972	4,849	4,778	4,720	4,711	4,716	4,762	4,851	4,954	5,052	5,149	10..14	5,293	5,444	5,608	5,783	5,967	6,158	6,346	6,529	6,706	6,877	7,041	7,197	7,347	7,490	7,627
15..19	5,362	5,173	5,237	5,258	5,277	5,289	5,390	5,401	5,463	5,471	5,521	5,445	5,426	5,418	5,458	5,511	15..19	5,604	5,737	5,885	6,028	6,170	6,358	6,543	6,731	6,921	7,112	7,303	7,490	7,673	7,850	8,020
20..24	5,421	5,503	5,428	5,367	5,352	5,336	5,283	5,428	5,533	5,636	5,732	5,915	6,013	6,162	6,255	6,389	20..24	6,399	6,459	6,530	6,649	6,781	6,953	7,148	7,339	7,510	7,664	7,852	8,036	8,224	8,414	8,605
25..29	4,198	4,238	4,485	4,755	4,997	5,251	5,487	5,491	5,513	5,580	5,646	5,674	5,902	6,090	6,276	6,454	25..29	6,720	6,895	7,120	7,290	7,500	7,586	7,711	7,833	7,987	8,137	8,309	8,504	8,696	8,866	9,021
30..34	4,544	4,431	4,280	4,100	4,008	4,006	4,081	4,323	4,590	4,829	5,081	5,315	5,317	5,336	5,402	5,467	30..34	5,495	5,720	5,905	6,089	6,265	6,528	6,705	6,937	7,114	7,330	7,416	7,541	7,662	7,816	7,965
35..39	5,715	5,443	5,181	4,911	4,731	4,557	4,431	4,281	4,101	4,008	4,006	4,079	4,320	4,584	4,822	5,071	35..39	5,302	5,304	5,322	5,387	5,450	5,478	5,699	5,878	6,056	6,228	6,489	6,665	6,896	7,072	7,287
40..44	6,447	6,424	6,314	6,332	6,235	6,044	5,815	5,583	5,343	5,194	5,051	4,953	4,833	4,683	4,619	4,645	40..44	4,746	5,012	5,301	5,565	5,839	6,096	6,119	6,152	6,226	6,293	6,320	6,538	6,715	6,891	7,061
45..49	6,452	6,629	6,791	6,845	6,879	6,913	6,937	6,858	6,906	6,842	6,683	6,487	6,287	6,081	5,964	5,852	45..49	5,785	5,695	5,576	5,543	5,597	5,727	6,013	6,317	6,589	6,866	7,120	7,141	7,174	7,246	7,312
50..54	5,711	5,855	6,155	6,426	6,600	6,795	7,019	7,202	7,281	7,340	7,398	7,447	7,395	7,467	7,42																	

The City of Nanaimo, Housing Occupancy Demand 2001 to 2031, Baseline Projection

	Total				Owned				Rental			
	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment
2001	32,630	20,320	5,650	6,660	21,790	17,960	2,430	1,400	10,840	2,360	3,220	5,260
2002	33,010	20,570	5,700	6,740	22,110	18,220	2,470	1,420	10,900	2,350	3,230	5,320
2003	33,510	20,900	5,760	6,850	22,510	18,540	2,520	1,450	11,000	2,360	3,240	5,400
2004	34,000	21,230	5,820	6,950	22,910	18,870	2,560	1,480	11,090	2,360	3,260	5,470
2005	34,490	21,560	5,890	7,040	23,300	19,190	2,610	1,500	11,190	2,370	3,280	5,540
2006	34,990	21,890	5,960	7,140	23,700	19,510	2,660	1,530	11,290	2,380	3,300	5,610
2007	35,540	22,250	6,040	7,250	24,130	19,850	2,720	1,560	11,410	2,400	3,320	5,690
2008	36,090	22,600	6,130	7,360	24,560	20,180	2,780	1,600	11,530	2,420	3,350	5,760
2009	36,610	22,950	6,200	7,460	24,980	20,520	2,830	1,630	11,630	2,430	3,370	5,830
2010	37,180	23,330	6,290	7,560	25,420	20,870	2,890	1,660	11,760	2,460	3,400	5,900
2011	37,760	23,710	6,380	7,670	25,870	21,220	2,950	1,700	11,890	2,490	3,430	5,970
2012	38,390	24,110	6,480	7,800	26,350	21,590	3,020	1,740	12,040	2,520	3,460	6,060
2013	39,000	24,500	6,570	7,930	26,810	21,950	3,080	1,780	12,190	2,550	3,490	6,150
2014	39,620	24,900	6,660	8,060	27,280	22,320	3,140	1,820	12,340	2,580	3,520	6,240
2015	40,260	25,310	6,760	8,190	27,770	22,700	3,210	1,860	12,490	2,610	3,550	6,330
2016	40,910	25,720	6,860	8,330	28,260	23,080	3,280	1,900	12,650	2,640	3,580	6,430
2017	41,580	26,150	6,960	8,470	28,790	23,480	3,360	1,950	12,790	2,670	3,600	6,520
2018	42,260	26,580	7,070	8,610	29,290	23,870	3,430	1,990	12,970	2,710	3,640	6,620
2019	42,950	27,010	7,190	8,750	29,810	24,270	3,510	2,030	13,140	2,740	3,680	6,720
2020	43,670	27,450	7,310	8,910	30,340	24,670	3,590	2,080	13,330	2,780	3,720	6,830
2021	44,390	27,880	7,440	9,070	30,860	25,070	3,670	2,120	13,530	2,810	3,770	6,950
2022	45,150	28,330	7,580	9,240	31,390	25,480	3,750	2,160	13,760	2,850	3,830	7,080
2023	45,870	28,740	7,710	9,420	31,890	25,860	3,830	2,200	13,980	2,880	3,880	7,220
2024	46,610	29,150	7,850	9,610	32,390	26,230	3,910	2,250	14,220	2,920	3,940	7,360
2025	47,310	29,540	7,980	9,790	32,860	26,590	3,980	2,290	14,450	2,950	4,000	7,500
2026	48,030	29,940	8,120	9,970	33,340	26,950	4,060	2,330	14,690	2,990	4,060	7,640
2027	48,720	30,310	8,240	10,170	33,770	27,280	4,120	2,370	14,950	3,030	4,120	7,800
2028	49,440	30,680	8,390	10,370	34,220	27,610	4,190	2,420	15,220	3,070	4,200	7,950
2029	50,120	31,040	8,520	10,560	34,640	27,930	4,250	2,460	15,480	3,110	4,270	8,100
2030	50,790	31,390	8,660	10,740	35,040	28,240	4,310	2,490	15,750	3,150	4,350	8,250
2031	51,440	31,730	8,780	10,930	35,440	28,550	4,360	2,530	16,000	3,180	4,420	8,400

The City of Nanaimo, Housing Occupancy Demand 2001 to 2031, High Migration Assumption

	Total				Owned				Rental			
	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment
2001	32,630	20,320	5,650	6,660	21,790	17,960	2,430	1,400	10,840	2,360	3,220	5,260
2002	33,020	20,580	5,700	6,740	22,120	18,230	2,470	1,420	10,900	2,350	3,230	5,320
2003	33,520	20,910	5,760	6,850	22,520	18,550	2,520	1,450	11,000	2,360	3,240	5,400
2004	34,010	21,240	5,820	6,950	22,920	18,880	2,560	1,480	11,090	2,360	3,260	5,470
2005	34,540	21,590	5,900	7,050	23,340	19,220	2,620	1,500	11,200	2,370	3,280	5,550
2006	35,090	21,950	5,980	7,160	23,760	19,560	2,670	1,530	11,330	2,390	3,310	5,630
2007	35,690	22,330	6,070	7,290	24,220	19,920	2,730	1,570	11,470	2,410	3,340	5,720
2008	36,310	22,720	6,180	7,410	24,670	20,280	2,790	1,600	11,640	2,440	3,390	5,810
2009	36,910	23,110	6,270	7,530	25,140	20,650	2,850	1,640	11,770	2,460	3,420	5,890
2010	37,590	23,530	6,390	7,670	25,640	21,040	2,920	1,680	11,950	2,490	3,470	5,990
2011	38,280	23,970	6,500	7,810	26,140	21,440	2,980	1,720	12,140	2,530	3,520	6,090
2012	39,030	24,440	6,630	7,960	26,680	21,860	3,060	1,760	12,350	2,580	3,570	6,200
2013	39,780	24,900	6,750	8,130	27,220	22,280	3,130	1,810	12,560	2,620	3,620	6,320
2014	40,560	25,380	6,880	8,300	27,770	22,710	3,200	1,860	12,790	2,670	3,680	6,440
2015	41,360	25,890	7,010	8,460	28,350	23,170	3,280	1,900	13,010	2,720	3,730	6,560
2016	42,210	26,400	7,160	8,650	28,940	23,630	3,360	1,950	13,270	2,770	3,800	6,700
2017	43,090	26,930	7,310	8,850	29,570	24,110	3,450	2,010	13,520	2,820	3,860	6,840
2018	43,990	27,480	7,470	9,040	30,200	24,600	3,540	2,060	13,790	2,880	3,930	6,980
2019	44,900	28,040	7,630	9,230	30,840	25,100	3,630	2,110	14,060	2,940	4,000	7,120
2020	45,860	28,610	7,810	9,440	31,490	25,610	3,720	2,160	14,370	3,000	4,090	7,280
2021	46,860	29,200	8,000	9,660	32,160	26,130	3,820	2,210	14,700	3,070	4,180	7,450
2022	47,890	29,800	8,190	9,900	32,860	26,670	3,920	2,270	15,030	3,130	4,270	7,630
2023	48,890	30,370	8,380	10,140	33,500	27,170	4,010	2,320	15,390	3,200	4,370	7,820
2024	49,920	30,940	8,580	10,400	34,170	27,680	4,110	2,380	15,750	3,260	4,470	8,020
2025	50,930	31,520	8,770	10,640	34,820	28,190	4,200	2,430	16,110	3,330	4,570	8,210
2026	51,940	32,090	8,960	10,890	35,460	28,690	4,290	2,480	16,480	3,400	4,670	8,410
2027	52,970	32,650	9,160	11,160	36,100	29,180	4,380	2,540	16,870	3,470	4,780	8,620
2028	53,970	33,200	9,360	11,410	36,710	29,660	4,460	2,590	17,260	3,540	4,900	8,820
2029	54,970	33,750	9,550	11,670	37,320	30,140	4,540	2,640	17,650	3,610	5,010	9,030
2030	55,980	34,300	9,750	11,930	37,930	30,620	4,620	2,690	18,050	3,680	5,130	9,240
2031	56,970	34,840	9,950	12,180	38,530	31,090	4,700	2,740	18,440	3,750	5,250	9,440

The City of Nanaimo, Housing Occupancy Demand 2001 to 2031, Low Migration Assumption

	Total				Owned				Rental			
	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment	Total	Single-detached	Other Attached	Apartment
2001	32,630	20,320	5,650	6,660	21,790	17,960	2,430	1,400	10,840	2,360	3,220	5,260
2002	33,010	20,570	5,700	6,740	22,110	18,220	2,470	1,420	10,900	2,350	3,230	5,320
2003	33,510	20,900	5,760	6,850	22,510	18,540	2,520	1,450	11,000	2,360	3,240	5,400
2004	33,990	21,220	5,820	6,950	22,900	18,860	2,560	1,480	11,090	2,360	3,260	5,470
2005	34,470	21,550	5,880	7,040	23,290	19,180	2,610	1,500	11,180	2,370	3,270	5,540
2006	34,960	21,870	5,950	7,140	23,680	19,490	2,660	1,530	11,280	2,380	3,290	5,610
2007	35,460	22,210	6,020	7,230	24,090	19,820	2,710	1,560	11,370	2,390	3,310	5,670
2008	35,970	22,540	6,100	7,330	24,490	20,130	2,770	1,590	11,480	2,410	3,330	5,740
2009	36,440	22,860	6,170	7,410	24,880	20,440	2,820	1,620	11,560	2,420	3,350	5,790
2010	36,960	23,210	6,250	7,500	25,300	20,770	2,880	1,650	11,660	2,440	3,370	5,850
2011	37,490	23,560	6,320	7,610	25,720	21,100	2,930	1,690	11,770	2,460	3,390	5,920
2012	38,020	23,920	6,400	7,700	26,140	21,430	2,990	1,720	11,880	2,490	3,410	5,980
2013	38,550	24,260	6,470	7,820	26,560	21,750	3,050	1,760	11,990	2,510	3,420	6,060
2014	39,070	24,600	6,540	7,930	26,980	22,070	3,110	1,800	12,090	2,530	3,430	6,130
2015	39,610	24,960	6,620	8,030	27,410	22,410	3,170	1,830	12,200	2,550	3,450	6,200
2016	40,150	25,310	6,690	8,150	27,840	22,740	3,230	1,870	12,310	2,570	3,460	6,280
2017	40,690	25,670	6,770	8,250	28,290	23,080	3,300	1,910	12,400	2,590	3,470	6,340
2018	41,230	26,020	6,850	8,360	28,730	23,410	3,370	1,950	12,500	2,610	3,480	6,410
2019	41,780	26,370	6,940	8,470	29,150	23,730	3,440	1,980	12,630	2,640	3,500	6,490
2020	42,320	26,710	7,020	8,590	29,580	24,060	3,500	2,020	12,740	2,650	3,520	6,570
2021	42,900	27,060	7,120	8,720	30,010	24,380	3,570	2,060	12,890	2,680	3,550	6,660
2022	43,450	27,390	7,220	8,								



# Table D.1

## CITY OF NANAIMO

### FORECAST RETAIL FLOOR-SPACE GROWTH - Baseline Growth

	Projected		
	2006	2021	2031
<b>Primary Trade Area</b>			
Population	169,500	231,500	275,400
Forecast pop. growth rate	3.0%	2.1%	1.8%
Est. Per Capita DSTM expend.	\$2,459	\$2,650	\$2,785
Total DSTM Potential	\$416,726,000	\$613,371,000	\$767,002,000
Residual Growth (Annual Potential)	\$53,780,000	\$250,425,000	\$404,056,000
Warranted Floor Area at \$280/sq. ft.	192,000	894,000	1,443,000
<b>Secondary Trade Area</b>			
Population	154,600	190,400	214,500
Forecast pop. growth rate	1.5%	1.4%	1.2%
Est. Per Capita DSTM expend.*	\$2,409	\$2,597	\$2,729
Total DSTM Potential	\$372,492,000	\$494,385,000	\$585,445,000
Residual Growth (Annual Potential)	\$28,378,000	\$150,271,000	\$241,331,000
Warranted Floor Area at \$280/sq. ft.	101,000	537,000	862,000
<b>Tertiary Trade Area</b>			
Population	110,000	159,300	200,000
Forecast pop. growth rate	3.0%	2.5%	2.3%
Est. Per Capita DSTM expend.*	\$2,360	\$2,544	\$2,674
Total DSTM Potential	\$259,624,000	\$405,190,000	\$534,729,000
Residual Growth (Annual Potential)	\$33,585,000	\$179,151,000	\$308,690,000
Warranted Floor Area at \$280/sq. ft.	120,000	640,000	1,102,000
<b>TOTAL TRADE AREA POTENTIAL</b>	<b>413,000</b>	<b>2,071,000</b>	<b>3,407,000</b>
Est. City of Nanaimo Market Share	65%	55%	45%
<b>Required DSTM - City of Nanaimo</b>	<b>268,000</b>	<b>1,139,000</b>	<b>1,533,000</b>
<b>Required Retail/Restaurant/Service Floor Area</b>	<b>412,000</b>	<b>1,752,000</b>	<b>2,358,000</b>

**Sources:**

Statistics Canada - Historical Retail Trade Data.  
Urbanics Consultants Ltd.

**Notes:**

\* Revised baseline based on Urban Futures' population forecasts for City of Nanaimo and RDN.

## Table D.2

### CITY OF NANAIMO

### FORECAST RETAIL FLOOR-SPACE GROWTH - Lower Growth

	Projected		
	2006	2021	2031
<b>Primary Trade Area</b>			
Population	167,500	222,100	252,700
Forecast pop. growth rate	2.7%	1.9%	1.3%
Est. Per Capita DSTM expend.	\$2,459	\$2,650	\$2,785
Total DSTM Potential	\$411,809,000	\$588,465,000	\$703,782,000
Residual Growth (Annual Potential)	\$48,863,000	\$225,519,000	\$340,836,000
Warranted Floor Area at \$280/sq. ft.	175,000	805,000	1,217,000
<b>Secondary Trade Area</b>			
Population	154,000	184,200	203,500
Forecast pop. growth rate	1.4%	1.2%	1.0%
Est. Per Capita DSTM expend.*	\$2,409	\$2,597	\$2,729
Total DSTM Potential	\$371,046,000	\$478,286,000	\$555,422,000
Residual Growth (Annual Potential)	\$26,932,000	\$134,172,000	\$211,308,000
Warranted Floor Area at \$280/sq. ft.	96,000	479,000	755,000
<b>Tertiary Trade Area</b>			
Population	108,700	155,100	189,100
Forecast pop. growth rate	2.7%	2.4%	2.0%
Est. Per Capita DSTM expend.*	\$2,360	\$2,544	\$2,674
Total DSTM Potential	\$256,556,000	\$394,507,000	\$505,587,000
Residual Growth (Annual Potential)	\$30,517,000	\$168,468,000	\$279,548,000
Warranted Floor Area at \$280/sq. ft.	109,000	602,000	998,000
<b>TOTAL TRADE AREA POTENTIAL</b>	<b>380,000</b>	<b>1,886,000</b>	<b>2,970,000</b>
Est. City of Nanaimo Market Share	65%	55%	45%
<b>Required DSTM - City of Nanaimo</b>	<b>247,000</b>	<b>1,037,000</b>	<b>1,337,000</b>
<b>Required Retail/Restaurant/Service Floor Area</b>	<b>380,000</b>	<b>1,595,000</b>	<b>2,057,000</b>

**Sources:**

Statistics Canada - Historical Retail Trade Data.  
Urbanics Consultants Ltd.

**Notes:**

\* Revised baseline based on Urban Futures' population forecasts for City of Nanaimo and RDN.

# Table D.3

## CITY OF NANAIMO

### FORECAST RETAIL FLOOR-SPACE GROWTH - Higher Growth

	Projected		
	2006	2021	2031
<b>Primary Trade Area</b>			
Population	170,200	246,500	309,400
Forecast pop. growth rate	3.1%	2.5%	2.3%
Est. Per Capita DSTM expend.	\$2,459	\$2,650	\$2,785
Total DSTM Potential	\$418,447,000	\$653,114,000	\$861,694,000
Residual Growth (Annual Potential)	\$55,501,000	\$290,168,000	\$498,748,000
Warranted Floor Area at \$280/sq. ft.	198,000	1,036,000	1,781,000
<b>Secondary Trade Area</b>			
Population	156,500	198,600	228,200
Forecast pop. growth rate	1.8%	1.6%	1.4%
Est. Per Capita DSTM expend.*	\$2,409	\$2,597	\$2,729
Total DSTM Potential	\$377,070,000	\$515,677,000	\$622,837,000
Residual Growth (Annual Potential)	\$32,956,000	\$171,563,000	\$278,723,000
Warranted Floor Area at \$280/sq. ft.	118,000	613,000	995,000
<b>Tertiary Trade Area</b>			
Population	110,000	166,500	211,100
Forecast pop. growth rate	3.0%	2.8%	2.4%
Est. Per Capita DSTM expend.*	\$2,360	\$2,544	\$2,674
Total DSTM Potential	\$259,624,000	\$423,504,000	\$564,407,000
Residual Growth (Annual Potential)	\$33,585,000	\$197,465,000	\$338,368,000
Warranted Floor Area at \$280/sq. ft.	120,000	705,000	1,208,000
<b>TOTAL TRADE AREA POTENTIAL</b>	<b>436,000</b>	<b>2,354,000</b>	<b>3,984,000</b>
Est. City of Nanaimo Market Share	65%	55%	45%
<b>Required DSTM - City of Nanaimo</b>	<b>283,000</b>	<b>1,295,000</b>	<b>1,793,000</b>
<b>Required Retail/Restaurant/Service Floor Area</b>	<b>435,000</b>	<b>1,992,000</b>	<b>2,758,000</b>

**Sources:**

Statistics Canada - Historical Retail Trade Data.  
Urbanics Consultants Ltd.

**Notes:**

\* Revised baseline based on Urban Futures' population forecasts for City of Nanaimo and RDN.

## Table D.4 CITY OF NANAIMO FORECAST OFFICE SPACE GROWTH - Baseline Growth Scenario

	2002	2006	2011	2016	2021	2026	2031
Population Forecast	77,139	80,181	85,032	91,154	98,556	106,529	113,923
Per Capita Office Floor Area	24.5	25.0	25.0	25.5	26.0	26.5	27.0
Total Office Floor Area Required	1,889,906	2,004,525	2,125,800	2,324,427	2,562,456	2,823,019	3,075,921
Downtown Office Floor Area	850,457	881,991	914,094	976,259	1,050,607	1,129,207	1,230,368
Downtown Office as % Of Total	45%	44%	43%	42%	41%	40%	40%
Existing (2002) Office Inventory (est.)	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000
<b>Residual Office Space Demand - Total*</b>	<b>40,000</b>	<b>155,000</b>	<b>276,000</b>	<b>474,000</b>	<b>712,000</b>	<b>973,000</b>	<b>1,226,000</b>
Existing (2002) Office Inventory - D.T. (est.)	847,000	847,000	847,000	847,000	847,000	847,000	847,000
<b>Residual Office Space Downtown - Total*</b>	<b>3,000</b>	<b>35,000</b>	<b>67,000</b>	<b>129,000</b>	<b>204,000</b>	<b>282,000</b>	<b>383,000</b>
<b>Residual Office Space - Other Nanaimo</b>	<b>37,000</b>	<b>120,000</b>	<b>209,000</b>	<b>345,000</b>	<b>508,000</b>	<b>691,000</b>	<b>843,000</b>

**Sources:**

Urban Futures  
Urbanics Consultants Ltd.

**Note:**

\* Rounded to the nearest 1,000.

## Table D.5 CITY OF NANAIMO FORECAST OFFICE SPACE GROWTH - Lower Growth Scenario

	2002	2006	2011	2016	2021	2026	2031
Population Forecast	77,139	80,110	84,320	89,153	94,582	100,104	104,957
Per Capita Office Floor Area	24.5	25.0	25.0	25.0	25.5	25.5	26.0
Total Office Floor Area Required	1,889,906	2,002,750	2,108,000	2,228,825	2,411,841	2,552,652	2,728,882
Downtown Office Floor Area	850,457	881,210	906,440	936,107	988,855	1,021,061	1,091,553
Downtown Office as % Of Total	45%	44%	43%	42%	41%	40%	40%
Existing (2002) Office Inventory (est.)	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000
<b>Residual Office Space Demand - Total*</b>	<b>40,000</b>	<b>153,000</b>	<b>258,000</b>	<b>379,000</b>	<b>562,000</b>	<b>703,000</b>	<b>879,000</b>
Existing (2002) Office Inventory - D.T. (est.)	847,000	847,000	847,000	847,000	847,000	847,000	847,000
<b>Residual Office Space Downtown - Total*</b>	<b>3,000</b>	<b>34,000</b>	<b>59,000</b>	<b>89,000</b>	<b>142,000</b>	<b>174,000</b>	<b>245,000</b>
<b>Residual Office Space - Other Nanaimo</b>	<b>37,000</b>	<b>119,000</b>	<b>199,000</b>	<b>290,000</b>	<b>420,000</b>	<b>529,000</b>	<b>634,000</b>

**Sources:**

Urban Futures  
Urbanics Consultants Ltd.

**Note:**

\* Rounded to the nearest 1,000.

## Table D.6 CITY OF NANAIMO FORECAST OFFICE SPACE GROWTH - Higher Growth Scenario

	2002	2006	2011	2016	2021	2026	2031
Population Forecast	77,133	80,494	86,658	95,175	105,966	117,976	129,581
Per Capita Office Floor Area	24.5	25.5	25.5	26.0	26.5	27.0	27.5
Total Office Floor Area Required	1,889,759	2,052,597	2,209,779	2,474,550	2,808,099	3,185,352	3,563,478
Downtown Office Floor Area	850,391	903,143	950,205	1,039,311	1,151,321	1,274,141	1,425,391
Downtown Office as % Of Total	45%	44%	43%	42%	41%	40%	40%
Existing (2002) Office Inventory (est.)	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000	1,850,000
<b>Residual Office Space Demand - Total*</b>	<b>40,000</b>	<b>203,000</b>	<b>360,000</b>	<b>625,000</b>	<b>958,000</b>	<b>1,335,000</b>	<b>1,713,000</b>
Existing (2002) Office Inventory - D.T. (est.)	847,000	847,000	847,000	847,000	847,000	847,000	847,000
<b>Residual Office Space Downtown - Total*</b>	<b>3,000</b>	<b>56,000</b>	<b>103,000</b>	<b>192,000</b>	<b>304,000</b>	<b>427,000</b>	<b>578,000</b>
<b>Residual Office Space - Other Nanaimo</b>	<b>37,000</b>	<b>147,000</b>	<b>257,000</b>	<b>433,000</b>	<b>654,000</b>	<b>908,000</b>	<b>1,135,000</b>

**Sources:**

Urban Futures  
Urbanics Consultants Ltd.

**Note:**

\* Rounded to the nearest 1,000.