



Municipality of North Cowichan
Economic Development Action Plan

May 2025

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Introduction

North Cowichan's Economic Development Action Plan provides a roadmap for advancing economy-related goals in the Official Community Plan and supporting a stronger, more sustainable local economy.

In recent years the Municipality of North Cowichan has shown a renewed commitment to economic development while recognizing that it operates in the context of a regional economy and in collaboration with multiple local and regional organizations. The Municipality of North Cowichan has articulated a clear desire to allocate more funding toward economic development initiatives at the municipal level, recognizing the transformative potential of a well-resourced and targeted approach. This commitment is vital to achieving the community's economic development goals, which are grounded in sustainability, inclusivity, and resilience.

The Municipality of North Cowichan's Economic Development Action Plan (EDAP) provides a comprehensive roadmap for fostering a sustainable, inclusive, and regenerative local economy. Aligned with the principles of the Official Community Plan, this strategy emphasizes achieving economic growth while respecting ecological boundaries, addressing social equity, and creating resilience in the face of economic and environmental challenges. The plan is structured around five strategic priorities designed to improve the local business climate, support traditional industries, nurture emerging opportunities, enhance the community's sense of place, and advance regenerative economic principles.

The plan's implementation framework is deeply rooted in partnership opportunities that unlock resources, expertise, and shared benefits. These partnerships will support the Municipality in accessing provincial and federal grant programs, such as the Rural Economic Diversification and Infrastructure Program and the Green Municipal Fund, while simultaneously collaborating with stakeholders like the Cowichan Valley Regional District, Tourism Cowichan, and the Quw'utsun peoples to pool knowledge and resources. By working collaboratively, North Cowichan aims to amplify the impact of its initiatives, particularly in areas such as infrastructure development, workforce training, tourism promotion, and the advancement of a circular economy.

Moreover, the plan emphasizes the importance of strategic investments in capacity building. This includes expanding the Municipality's ability to deliver economic development services, streamlining processes like development approvals, and supporting targeted initiatives such as the creation of an eco-industrial park and the development of mixed-use communities near the new Cowichan District Hospital. These efforts aim to diversify the local economy, reduce reliance on legacy industries, and attract investment in regenerative and knowledge-based sectors. The EDAP also prioritizes engaging local businesses, residents, and other partners to ensure alignment with community needs and aspirations. By fostering trust and transparency, the Municipality seeks to build momentum for collective action, ensuring that economic development efforts are inclusive and beneficial to all stakeholders.

The Municipality of North Cowichan's Economic Development Action Plan is both a vision and a call to action. It is a framework for leveraging partnerships, increasing funding, and building capacity to create a resilient, diversified, and regenerative economy. By prioritizing collaboration, the Municipality aims to unlock the full potential of its community, ensuring economic prosperity while safeguarding the natural and cultural heritage that defines North Cowichan.

Context

The creation of this Action Plan takes into consideration the following key elements of the local situation:



The Municipality is located on the traditional lands of the Quw'utsun peoples, which includes the Cowichan Tribes, Halalt First Nation, Lyackson First Nation, Penelakut Tribe and Stz'uminus First Nation. Economic development initiatives in North Cowichan are pursued with a spirit of openness and engagement with Quw'utsun peoples, guided by mutual respect, shared values, and a commitment to balance environmental conservation, cultural heritage preservation, and shared economic benefit. Opportunities for direct partnership and cooperation on programs and initiatives will regularly be explored.



The Municipality of North Cowichan does not currently have dedicated staff and resources for economic development, which means this plan has been shaped, in part, by the need for implementation to either (a) fit into existing areas of municipal activity, or (b) to be implemented through partnerships and/or grant funding support.



The Municipality is part of the regional Economic Development Cowichan service through the Cowichan Valley Regional District. Concurrent with the preparation of this plan, a regional economic development strategy process was undertaken. The two organizations and their consulting teams collaborated at several points in the process to share information and to avoid overlap in consultation efforts. While the strategic priorities of this plan were developed independent of the regional process, there is significant potential symmetry in the regional plan establishing high-level strategic directions and this more action-oriented plan pursuing complementary on-the-ground initiatives in North Cowichan.



The Municipality's Official Community Plan encourages a regenerative approach to economic development. A "regenerative" economy is one where activities reverse ecological damage and have a net-positive impact on the natural environment. This is accomplished by reducing waste and pollution and recirculating products and materials to achieve their highest value. Certain priorities in this plan more directly address regenerative opportunities, but it should be understood as an underlying principle throughout the plan. This approach is also consistent with the "doughnut economics" concept, which is a holistic perspective of economic development that recognizes ecological limitations and a focus on achieving social foundations.

Competitive Assessment

Economic development plans need to reflect the competitive realities of the local economy. The benefits of economic development (such as enhanced municipal tax base, increased local employment opportunities, and improved commercial amenities) will be achieved only through capitalizing on viable business opportunities.

The Action Plan will build on local strengths, support the realization of local economic opportunities, and attempt to mitigate or remove local challenges. The assessment summarized below is based on consultation with the community, review of previous studies and other relevant documents in North Cowichan (and elsewhere, if relevant), and the economic analysis outlined in the Appendix. While such an assessment cannot possibly cover all aspects of a community, the points highlighted below are most relevant to local economic development success in North Cowichan.

Strengths and Opportunities

These are the strengths and opportunities from the perspective of local regenerative economic development. They have the potential to be leveraged or enhanced to further the community's regenerative economic development goals. Additional detail on opportunities is provided in the discussion of strategic priorities in the next section.

Attractive housing options: Housing inventories in North Cowichan have increased significantly since 2022 and prices remain lower than other nearby urban centres such as the Lower Mainland and Greater Victoria. This may help to recruit staff from nearby regions.

Traditional industrial strength in wood products manufacturing: The region maintains traditional industrial strength in wood products manufacturing, including pulp and paper, as well as various related manufacturing and service industries. Additionally, there is an emerging sector of circular and regenerative businesses.

Famous tourist attractions including the murals in Chemainus: Famous tourist attractions, such as the murals in Chemainus, present opportunities to enhance promotion of the region and leverage visitors for additional activities within the community.

High-traffic location: Situated in a high-traffic location between larger urban centers to the north (Nanaimo) and south (Greater Victoria), North Cowichan provides a readily available market for business growth opportunities.

Regenerative tourism experiences: There is an opportunity to increase tourism promotion by leveraging regenerative tourism experiences, including recreational assets like mountain biking and hiking trails, to boost visitation. North Cowichan is also uniquely positioned to benefit from nearby ferry access and the Trans Canada Trail as tourism drivers.

Cycle tourism: Cycle tourism is increasingly contributing to the employment landscape and attracting international interest. Cowichan hosts numerous bike shops, large-scale events, and athletes who make it their training base and home.

Locally produced food: Trade frictions with the United States have led to greater demand for locally produced food. The Cowichan Valley may experience an increase in agricultural production and sales, supported by the Buy BC program, which helps consumers choose local food and beverages.

Value-add agriculture diversification: There are various opportunities to diversify farm incomes through on-farm processing of food products, beverage or cannabis production and processing, agri-tourism programming (e.g., wine tastings, tours, outdoor activities), and more.

High quality of life: North Cowichan boasts a high quality of life with beautiful natural surroundings, wineries, and outdoor recreational opportunities.

Working professionals population: The local population of working professionals is growing, partly due to COVID-induced relocations from larger urban centers.

Front-line municipal staff: There is a favorable view of front-line municipal staff, based on experiences with tasks like renewing business licenses. This is relevant for future municipal-led initiatives that would benefit from existing good relationships with staff.

Opportunity for higher-density development: Opportunities exist to encourage evolving forms of higher-density industrial and commercial development by removing current density limits in industrial areas (e.g., office above) and commercial areas (residential above). A reduction in on-site parking requirements has also been identified to encourage higher density.

Interest in an eco-industrial park: A growing cluster of circular and regenerative businesses is emerging in North Cowichan and throughout mid and south Vancouver Island, with potential to create an eco-industrial park to serve as a hub for this activity in North Cowichan.

Cowichan District Hospital: The new Cowichan District Hospital presents various opportunities. Beyond the stimulus impact of this massive construction project, there is significant business development potential in the surrounding area for medical goods and services, as well as housing and amenities for hospital staff and visitors.

Export development and diversification: There is increased support for export development and diversification to international markets beyond the US from the federal and provincial governments.

Challenges and Limitations

The following are identified challenges and limitations from a local economic development perspective. The strategic approach is to acknowledge and work within these limitations, while taking active steps to improve them over time.

Rising housing costs: While housing costs in North Cowichan are much lower as compared to other nearby urban centres, including the Lower Mainland and Greater Victoria, costs remain high for many locals, particularly lower-income and youth populations.

Deteriorating conditions in the coastal forest sector: There is a risk of further closures of major forest products manufacturing facilities (Paper Excellence paper operations closed early in 2024). This would negatively impact all aspects of municipal service delivery and shift the tax burden in a significant way to other local taxpayers, including residents. Wages paid at these facilities are also among the highest in the community, creating negative repercussions for other local businesses that rely on the patronage of mill workers or the mill itself.

Limited supply of serviced light industrial land: The limited supply of serviced light industrial land contributes to very high land costs, restricting the ability to attract new industrial businesses and expand existing ones. There is a risk of current industrial businesses leaving the community.

Unfavourable views of the development approval process: There are unfavorable views regarding the development approval process, including delays, which is a common issue for municipalities across BC and Canada.

Limited promotion of local companies: There is limited promotion of local companies to travelers passing through North Cowichan, who may be unaware of offerings off the highway, as well as within North Cowichan to residents who may not know what exists in other parts of the community. Successful industrial businesses with innovative products and well-paying jobs could be better promoted both within and outside the community.

Limited public transit: Residents without private vehicles struggle to access services and accept jobs that rely on timely transit service, as do travelers. This challenge is particularly acute for residents of Chemainus and Crofton.

Older population demographics: North Cowichan has an older population relative to BC and similar communities, which may lead to a shrinking resident workforce and exacerbate labor shortages without significant inflows of new, younger residents.

Lower average incomes: The region has a proportionately large number of retirees with more modest spending power from pensions and savings. Additionally, about one-quarter of jobs in the community are in low-wage service sectors.

Relatively low level of post-secondary completion: The resident workforce has a relatively low level of post-secondary completion, partly due to the community's reliance on primary industries such as forestry extraction and manufacturing, which have limited need for higher education credentials.

Street disorder challenges: Street disorder, particularly in the South End, affects day-to-day operations for retail and other storefront businesses.

Trade and investment uncertainty is increasing given recent shifts in United States' economic policy. American trade restrictions on Canada, if imposed, are likely to provoke a moderate recession, with particularly acute effects in communities that rely on exports to the United States. Increased uncertainty is also likely to drive international investment away from Canadian communities and towards the United States as firms seek to guarantee access to the larger American market. For more details, see Deloitte Canada's [Spring Economic Outlook](#).



Strategic Priorities

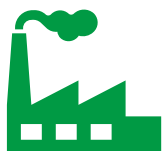
The five strategic priorities outlined below provide an overall framework for the more detailed action plan that follows. The priorities reflect major themes from the competitive assessment and provide an easy digestible summary of the plan contents for communication purposes.

The priorities are structured to align with the Economic Development Committee's overall objectives and vision for economic development, which prioritize the growth of well-paying jobs in the community, diversifying the tax base away from its current reliance on major industrial taxpayers, and supporting regenerative economy opportunities.



Strategic Priority #1 – Improve the Local Business Climate

Business climate issues are common to most industries and types and sizes of business. Building a more supportive, efficient, and welcoming climate for all business will help both the attraction and retention of investment and employment.



Strategic Priority #2 – Support the Adaptation and Resilience of Traditional Industries

Forestry and related manufacturing and support industries are the traditional bedrock of the North Cowichan economy. Along with agriculture and tourism, these traditional strengths are undergoing a challenging period of transition and some are at risk of being lost. These sectors will be different in the future but have the potential to continue playing a major role in the local economy.



Strategic Priority #3 – Nurture the Growth of Emerging Economic Opportunities

This priority provides an over-arching umbrella for actions that support emerging opportunities for economic diversification. Some are relatively new industries to North Cowichan, while others have a long history but with new opportunities on the horizon.



Strategic Priority #4 – Continue Building an Attractive Sense of Place

Economic development opportunities of the future are increasingly less tied to a community's physical assets and more to the people that live and work there. Continuing to build sense of place through public and private amenities, housing options, transportation linkages, and more will make North Cowichan more desirable for new and current residents.



Strategic Priority #5 – Support the Widespread Adoption of Regenerative Economic Principles

North Cowichan's Climate Action & Energy Plan sets out seven categories of action, including compact, complete communities, efficient buildings and low-carbon industry, agriculture and forestry to support achieving an 80% reduction in emissions by 2050. Regenerative economic development is in alignment with these objectives through maintaining local resources and capital within the community at their highest and best use and supporting the development of low-carbon intensive industries and infrastructure.

Action Plan

The detailed Action Plan in this section of the report elaborates on the five Strategic Priorities outlined above. Within each priority there are multiple recommended action items and implementation steps. Implementation will require dedicated resources and partnerships with key stakeholders for progress to be made. In some cases, a partner organization rather than the municipality will take a lead on a particular initiative, pending further engagement with possible partners to coordinate and deliver on actions.

The Economic Development Action Plan will be implemented by incrementally mainstreaming the actions along each priority into the Municipality's planning and decision-making processes. The Economic Development Committee would receive progress updates and be responsible for overseeing the advancement of these priorities and reporting progress to Council. Action items would be presented through the annual business planning process. This ongoing practice will ensure the actions are implemented strategically and contingent on available resources, from year to year as conditions change.

The individual action items are also organized according to their priority, timing, and estimated cost. Action items with the greatest priority, shortest time horizon, and lowest cost are ordered first. High priority is determined by actions that are recommended to be completed immediately as they either set the baseline for future economic development efforts or are expected to have a high economic impact on the local economy. Cost considerations are approximate, with estimated budgetary requirements indicated by one to three dollar signs:

- \$ - Less than \$25,000 (all values estimated in 2025 Canadian dollars)
- \$\$ - \$25,000 to less than \$100,000
- \$\$\$ - \$100,000 or more

Strategic Priority #1 – Improve the Local Business Climate

Business climate issues are common to most industries and types and sizes of business. Building a more supportive, efficient, and welcoming climate for all business will help both the attraction and retention of investment and employment.

Action Items	Implementation	Management
1. Collaborate with local First Nations on economic development initiatives	<i>Implementation steps</i> - Establish a dedicated liaison or group of liaisons to facilitate ongoing communication and collaboration with First Nations in the region. - Develop a memorandum of understanding with each First Nation to outline mutual goals and responsibilities. - Organize regular joint meetings and cultural exchange programs to build trust and understanding.	Priority: High Timing: Short-term Cost: \$
	<i>Performance measures</i> - Increase in the number of memoranda of understandings signed with First Nations. - Development of new initiatives with First Nations in areas such as workforce development, sector-specific opportunity, commercial services, housing, healthcare, and others.	
2. Streamline development approvals process	<i>Implementation steps</i> - Conduct a review of current processes find ways to speed up development approval timelines. - Update development regulations and policies based on the findings of the service review.	Priority: High Timing: Short-term Cost: \$
	<i>Performance measures</i> - Reduction in average processing time for development approvals. - User feedback indicating an increase in satisfaction with the development approvals process, measured through consultation or survey.	
3. Evaluate and update zoning bylaw	<i>Implementation steps</i> - Review zoning bylaws to reflect the evolving standards of mixed-use activity and provide for an overall increase in the range of industrial, commercial and retail spaces permitted. - Review zoning to allow for increased convergence between industrial and commercial activities such as smaller-unit industrial park developments with higher densities and the ability to accommodate traditional office work, research and development, prototyping, and goods storage.	Priority: High Timing: Short-term Cost: \$

Action Items	Implementation	Management
	<i>Performance measures</i> • Increase in available industrial, commercial, and retail spaces. • Increase in the number of mixed-use industrial and commercial developments. • Stakeholder feedback demonstrating an increase in the effectiveness of zoning changes, measured through consultation or survey.	
4. Clarify economic development responsibilities	<i>Implementation steps</i> • Participate in the development of a collaboration framework to clarify the responsibilities of North Cowichan, Economic Development Cowichan, and other stakeholders (e.g., Tourism Cowichan) to ensure efficient alignment of services and clear points of contact for local businesses and interested investors.	Priority: Medium Timing: Short-term Cost: \$
	<i>Performance measures</i> • Development of an organizational chart and communication plan for relevant parties. • Creation of clear pathfinding protocols, indicating the referrals process and highlighting key contacts based on the needs of businesses, residents, and investors.	
5. Increase public messaging with the local business community	<i>Implementation steps</i> • Pursue engagement activities with local employers with participation from Mayor and Council as well as senior city administration officials.	Priority: Medium Timing: Short-term Cost: \$
	<i>Performance measures</i> • Number of engagement activities held with local employers. • Number of businesses participating in engagement activities.	
6. Upgrade infrastructure capacity to enable development	<i>Implementation steps</i> • Complete design and construction of water and sanitary infrastructure upgrades to provide/unlock capacity for development, including underserved industrial zoned areas. • Update DCC bylaws • Complete Bell McKinnon servicing study • Maintain inventory with information about utilization of industrial lands.	Priority: High Timing: Short-term Cost: \$\$\$
	<i>Performance measures</i> • Increase in available serviced industrial land. • Completion of infrastructure projects.	

Action Items	Implementation	Management
7. Increase awareness of business advisory opportunities	<i>Implementation steps</i> - Enhance regional action to develop relationships with for-profit and non-profit organizations providing business advice to facilitate referrals. - Provide a directory of resources for local residents and business owners to consult, with specific supports for the incorporation of cooperatives and joint ventures.	Priority: Medium Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> - Number of relationships established with organizations providing business supports. - Number of direct referrals to partner organizations providing business advice.	
8. Continue supporting initiatives to address public disorder challenges in the Highway 1 Corridor	<i>Implementation steps</i> - Establish a regular meeting schedule with affected stakeholders to ensure a coordinated approach, including continuing measures involving law enforcement, street cleanup, and the provision of social supports. - Implement the Safer Community Plan.	Priority: Medium Timing: Medium-term Cost: \$
	<i>Performance measures</i> Reduction in the number of public disorder incidents in the Highway 1 Corridor.	
9. Encourage consumption of local and national products	<i>Implementation steps</i> - Promote local and regionally-produced products in partnership with other economic development stakeholders. - Connect businesses and farms to existing marketing programs such as Island Good and Buy BC - Develop a directory of local goods-producing businesses to encourage residents to support enterprises in the community. - Continue to support the Island Good initiative by VIEA (Vancouver Island Economic Alliance) to develop standardization in labelling products produced in North Cowichan, British Columbia, and promoting them across Canada. - Amend North Cowichan Procurement Policy to purchase local goods and services where possible	Priority: Medium Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> Adoption of standardized labelling methods by local retailers indicating product origin.	

Action Items	Implementation	Management
	- Feedback from local businesses on the effectiveness of information efforts indicating local-produced products, measured through consultation or survey. - North Cowichan procurement value from local suppliers	
10. Collaborate with the Ministry of Transportation and Infrastructure on highway improvement projects	<i>Implementation steps</i> - Develop a regular meeting schedule with the Ministry of Transportation and Infrastructure to coordinate efforts. - Conduct regular progress reviews and update stakeholders on status.	Priority: Medium Timing: Long-term
	<i>Performance measures</i> - Stakeholder feedback demonstrating an increase in public satisfaction with highway improvement projects. - Reduction in average travel times on nearby highways. - Reduction in the frequency of accidents on nearby highways.	Cost: \$
11. Employ policy and fiscal tools to invest in local business revitalization	<i>Implementation steps</i> - Use municipal fiscal tools to support building investment in older village cores, such as a façade improvement grant or revitalization tax exemption program. - Prioritize investments in infrastructure that support small businesses during the implementation of local area plans. - Explore the development of new business improvement supports for core areas to drive traffic to local companies.	Priority: Medium Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> - Improvement in the appearance and functionality of village cores, measured through community consultation or survey. - Number of facades improved. - Stakeholder feedback from local businesses indicating satisfaction with new policy and fiscal tools, including investments and new business improvement supports. - Increase in the number of businesses operating in core areas.	
12. Continue the implementation of Local Area Plans	<i>Implementation steps</i> Continue to support commercial core enhancements on Joan Avenue in Crofton, consistent with the Crofton Local Area Plan, and support continued enhancements to waterfront and core area connectivity.	Priority: Medium

Action Items	Implementation	Management
	- Continue to invest in waterfront improvement projects in Chemainus that are consistent with the Chemainus Town Centre Revitalization Plan and enhance appeal to tourists and residents alike. - Continue to support the development of the Benchlands site just south of the current Chemainus core to provide additional commercial and recreational services. - Continue to implement the University Village Local Area Plan - Develop a Local Area Plan for Berkey's Corner.	Timing: Medium-term Cost: \$\$\$
	<i>Performance measures</i> Stakeholder feedback indicating high satisfaction with the implementation of the area plans, measured through community consultation or survey.	
13. Support the creation of a Regional Growth Strategy	<i>Implementation steps</i> - Collaborate with neighbouring municipalities and regional authorities to develop a cohesive strategy. - Promote regional consultations to North Cowichan residents and businesses to ensure substantial local input. - Ensure the alignment of the Regional Growth Strategy with existing municipal plans and policies.	Priority: Medium Timing: Long-term Cost: \$\$
	<i>Performance measures</i> Creation of a Regional Growth Strategy with support from key stakeholders.	
Funding Programs - Pacific Economic Development Canada – <i>Community Economic Development and Diversification Program</i> - Pacific Economic Development Canada – <i>Regional Innovation Ecosystems Program</i> - Global Affairs Canada, Trade Commissioner Service – <i>CanExport Community Investments</i> - BC Ministry of Jobs, Economic Development and Innovation – <i>Rural Economic Diversification and Infrastructure Program</i> - BC Ministry of Infrastructure – <i>Infrastructure Planning Grant Program</i> - BC Ministry of Infrastructure – <i>Growing Communities Fund</i> - BC Ministry of Infrastructure – <i>Clean Water and Wastewater Fund</i>		

Strategic Priority #2 – Support the Adaptation and Resilience of Traditional Industries

Forestry, agriculture, and tourism have traditionally supported North Cowichan's economy, but they are currently facing a challenging transition, exacerbated by tariffs. By implementing strategic actions, North Cowichan can adapt these industries to future challenges, ensuring their continued significance in the local economy.

Action Items	Implementation	Management
1. Support businesses to mitigate the impact of tariffs	<i>Implementation steps</i> - Advocate to other senior levels of government and work closely with partners to ensure businesses have the resources to remain competitive. - Increase outreach efforts to understand how local businesses are being affected and provide information on available support.	Priority: High Timing: Short-term Cost: \$\$
	<i>Performance measures</i> - Completion of outreach to local businesses affected by international protectionism. - Completion of advocacy efforts to senior level of government.	
2. Seek partnerships and opportunities to diversify under-utilized mill sites	<i>Implementation steps</i> - Create vacant property registry. - Conduct a feasibility study to identify potential new industries and partners. - Host industry roundtables to discuss partnership opportunities. - Develop incentive programs to attract new businesses to mill sites.	Priority: High Timing: Medium-term Cost: \$\$\$
	<i>Performance measures</i> - Number of potential industries and partners identified. - Number of industry roundtables hosted. - Increase in the number of new business inquiries and engagements due to the incentive programs. - Implementation of pilot projects with new partners.	
3. Continue to advocate for the retention of major forestry-based employers	<i>Implementation steps</i> - Conduct a bi-annual business survey that summarizes key business issues. - Schedule regular meetings with forestry employers.	Priority: Medium

Action Items	Implementation	Management
	Consider membership and active participation in the Forest Product Association of Canada to support engagement with provincial and federal governments to secure support and policies favourable to the local forestry industry.	Timing: Short-term Cost: \$\$
	<i>Performance measures</i> - Increased satisfaction among forestry employers with MNC's advocacy and support to other orders of government, measured through consultation or survey. - Stabilization or increase in the retention rate of major forestry employers in the region.	
4. Support agriculture economy-related initiatives including food processing expansion	<i>Implementation steps</i> - Distribute the Agriculture and Food Security Strategic Plan widely with partners. - Implement priority projects and monitor progress. - Provide regular updates to the community and stakeholders.	Priority: Medium Timing: Short-term
	<i>Performance measures</i> - Annual distribution of the Agriculture and Food Security Strategic Plan and subsequent communications related to Plan updates. - Number of projects implemented.	Cost: \$\$
5. Explore revenue-generating opportunities in the Municipal Forest Reserve, in collaboration with Quw'utsun First Nation	<i>Implementation steps</i> - Develop co-management framework and plan for the Municipal Forest Reserve with Quw'utsun Nation per the terms of the Memorandum of Understanding signed August 2021 - Complete review of a potential forest carbon credit project in partnership with Quw'utsun Nation.	Priority: Medium Timing: Short-term
	<i>Performance measures</i> Revenue increases attributable to new initiatives and compare against predefined targets.	Cost: \$\$
6. Explore opportunities to support manufacturing businesses	<i>Implementation steps</i> - Review municipal policies that affect growth of the manufacturing sector and adjust to create a business-friendly environment. - Connect local producers to available grants and funding sources. - Work to develop local skills that are needed for sector development.	Priority: Medium Timing: Long-term Cost: \$

Action Items	Implementation	Management
	<i>Performance measures</i> - Reduction in compliance time and costs - Increase in business satisfaction with support activities, measured through consultation or survey. - Number of grants received by industry in the region that support value-added manufacturing. - Number of workforce initiatives implemented.	
8. Ensure that noteworthy tourist attractions in North Cowichan are fully represented in regional Tourism Cowichan promotions	<i>Implementation steps</i> - Conduct an inventory of all tourist attractions in North Cowichan. - Coordinate with Tourism Cowichan to include all relevant attractions in their materials. - Develop promotional materials specific to North Cowichan attractions.	Priority: Medium Timing: Short-term
	<i>Performance measures</i> - Completion of a comprehensive inventory list detailing each tourist attraction in North Cowichan. - Creation and distribution of promotional materials that cover all significant attractions.	Cost: \$\$\$
9. Provide resources for local tourism development initiatives	<i>Implementation steps</i> - Identify needs and opportunities for tourism development in local areas. - Identify and compile a list of grants or funding available to local tourism projects.	Priority: Medium Timing: Medium-term
	<i>Performance measures</i> - Number of comprehensive needs and opportunities assessments conducted. - Completion of a detailed grants and funding review.	Cost: \$
10. Expand range of accommodation options	<i>Implementation steps</i> - Regularly monitor accommodation statistics that can be presented to potential new investors. - Encourage development of diverse accommodation types through incentives. - Partner with developers and investors to facilitate new accommodations.	Priority: Medium Timing: Long-term

Action Items	Implementation	Management
	<i>Performance measures</i> - Annual reports detailing improvement in occupancy rates, guest demographics, seasonal variations, and revenue per available room (RevPAR). - Increase in available accommodations (e.g., number of rooms).	Cost: \$
11. Build North Cowichan visitor packages that link multiple local companies	<i>Implementation steps</i> - Identify participating businesses and attractions. - Develop an online platform that connects local tourism operators that makes an easy one-stop-shop for building tourism packages.	Priority: Medium Timing: Medium-term
	<i>Performance measures</i> - Number of packages sold monthly or annually. - Calculate the return on investment for the marketing and operational costs associated with the packages.	Cost: \$\$
12. Support appropriate levels of tourism in traditionally high-traffic areas such as Chemainus	<i>Implementation steps</i> - Assess current tourism impact and infrastructure capabilities in Chemainus. - Target high-value tourism through market segmentation efforts.	Priority: Medium Timing: Medium-term
	<i>Performance measures</i> - Track changes in average spending per visitor and gather visitor satisfaction data through surveys to assess the quality of their experience. - Measure local residents' perceptions of tourism impacts to ensure community needs and concerns are addressed. - Monitor environmental indicators (e.g., waste management, natural resource impact) and social indicators (e.g., employment rates in tourism, local business growth). - Evaluate the usage rates of municipally-owned and operated tourism-related infrastructure and gather feedback to assess its adequacy and identify areas needing improvement.	Cost: \$\$\$
13. Continue to promote North Cowichan's identity as an attractive destination for visitors as well as prospective residents	<i>Implementation steps</i> - Conduct a tourism infrastructure assessment and invest in high-impact infrastructure. - Plan and budget for waterfront improvements that includes improvements to the waterfront in Chemainus through an extended seawalk and public boardwalk and expanded marina facilities in Chemainus and Maple Bay. - Seek funding and partnership opportunities. - Engage community and stakeholders for input.	Priority: Medium Timing: Medium-term Cost: \$\$\$

Action Items	Implementation	Management
	<i>Performance measures</i> • Completion of a detailed tourism infrastructure assessment. • Completion of a comprehensive plan for waterfront improvements. • Increase in the number of funding applications submitted annually. • Improvement in community satisfaction with tourism development efforts, measured through consultation or survey.	
14. Consult with the Cowichan Exhibition Society to determine whether the Exhibition Grounds require assistance, including promotion from the Municipality	<i>Implementation steps</i> • Schedule regular consultation meetings with the Cowichan Exhibition Society.	Priority: Low
	<i>Performance measures</i> • Determination related to North Cowichan’s assistance to the Exhibition Grounds. • Implementation of assistance to the Cowichan Exhibition Society (if required).	Timing: Short-term Cost: \$
15. Work with provincial partners to support expansion of agri-tourism operations	<i>Implementation steps</i> • Identify potential agri-tourism sites and assess their readiness. • Collaborate with Tourism Cowichan and provincial tourism departments. • Offer a North Cowichan “Spark” program for agri-tourism ideas. • Support the development of a regional tourism experience development program.	Priority: Low
	<i>Performance measures</i> • Increase in the number of existing agri-tourism sites participating, detailed reports on current visitor statistics, revenue data, and infrastructure readiness. • Increase in the number of new agri-tourism experiences launched.	Timing: Medium-term Cost: \$
Funding Programs • Pacific Economic Development Canada – <i>Community Economic Development and Diversification Program</i> • Pacific Economic Development Canada – <i>Regional Innovation Ecosystems Program</i> • BC Ministry of Jobs, Economic Development and Innovation – <i>Rural Economic Diversification and Infrastructure Program</i> • BC Ministry of Jobs, Economic Development and Innovation – <i>BC Manufacturing Jobs Fund</i> • The Forest Enhancement Society of BC – <i>Fibre Utilization Funding Program</i> • Forestry Innovation Investment – <i>Market Initiatives Funding Program and Wood First Program</i>		

Action Items	Implementation	Management
Destination BC – <i>Co-op Marketing Partnerships Program</i>		

Strategic Priority #3 – Nurture the Growth of Emerging Economic Opportunities

This priority provides an over-arching umbrella for actions that support emerging opportunities for economic diversification. Some are relatively new industries to North Cowichan, while others have a long history but with new opportunities on the horizon.

Action Items	Implementation	Management
1. Improve childcare capacity for working families	<i>Implementation steps</i> - Collaborate with local childcare providers and potential investors to implement the Cowichan Region Child Care Plan. - Explore funding opportunities and grants to support the development of new childcare spaces.	Priority: High Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> Increase in the number of childcare spaces available in North Cowichan.	
2. Support the development of cooperative enterprises	<i>Implementation steps</i> - Develop relationships with non-profit organizations that provide advice on the creation and management of cooperative enterprises (e.g., BC Cooperative Association, Cooperatives First). - Provide materials and invite speakers to educate municipal staff on the particularities of cooperative businesses, including the distinction between for-profit and non-profit cooperatives.	Priority: Medium Timing: Medium-term Cost: \$
	<i>Performance measures</i> - Number of informational sessions and workshops held to educate staff and the public on business establishment and models. - Number of direct referrals to partner organizations providing advice on cooperative development.	
3. Foster the development of a professional / knowledge-based community in North Cowichan	<i>Implementation steps</i> - Support the creation of a tech incubators program at the Cowichan Valley regional level. - Pursue the development of local office space as well as working from home infrastructure to accommodate skilled workers and entrepreneurs.	Priority: Medium Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> - Establishment of a tech incubator in the Cowichan Valley. - Increase in the availability of local office space and co-working spaces. - Number of new professional services/knowledge-based businesses established or relocated to the community.	

Action Items	Implementation	Management
4. Expand range of locally provided post-secondary and other training opportunities	<i>Implementation steps</i> - Collaborate regionally with Vancouver Island University and other potential post-secondary partners to identify and address skills gaps in the local labour force. - Collaborate regionally to investigate opportunities for local medical training programs, such as nursing and family medicine, with the opening of the Cowichan District Hospital.	Priority: Medium Timing: Long-term Cost: \$\$
	<i>Performance measures</i> Establishment of a local medical training program with partnership from the Cowichan District Hospital.	
5. Explore the potential for an eco-industrial park (EIP)	<i>Implementation steps</i> - Conduct a comprehensive review and summary of relevant discussions and research on eco-industrial parks, including more detailed interviews and case studies. - Create a tailored framework to complete a facilitated engagement process for developing a unified vision for the eco-industrial park, with reference to the Kalundborg guide for industrial symbiosis facilitation (see Appendix B). - Undertake facilitated consultations to determine a vision for an eco-industrial park in North Cowichan and to gauge level of community interest. - Assuming community support, conduct a more detailed feasibility study on the development of an eco-industrial park and assess possible alignment with the vision.	Priority: Medium Timing: Long-term Cost: \$\$
	<i>Performance measures</i> - Completion of a comprehensive review and summary of relevant discussions and research. - Stakeholder feedback indicating whether or not to pursue an eco-industrial park, measured through consultation or survey. - Completed feasibility study.	
6. Capitalize on the new Cowichan District Hospital	<i>Implementation steps</i> - Pursue the development of an adjacent mixed-use community with a range of medical-related businesses and employment opportunities. - As implementation proceeds for the Bell McKinnon Local Area Plan, ensure that businesses and employment opportunities are prioritized along with housing, infrastructure, transportation, parks and green spaces, and other important community-building factors.	Priority: Medium Timing: Medium-term Cost: \$\$\$

Action Items	Implementation	Management
	<i>Performance measures</i> • Square footage of new development within a five-minute walk of the new hospital. • Increase in employment in the medical sector in North Cowichan.	
Funding Programs • BC Ministry of Jobs, Economic Development and Innovation – <i>Rural Economic Diversification and Infrastructure program</i> • BC Ministry of Infrastructure – <i>Infrastructure Planning Grant program</i> • BC Ministry of Infrastructure – <i>Growing Communities Fund</i> • Federation of Canadian Municipalities – <i>Green Municipal Fund</i>		

Strategic Priority #4 – Continue Building an Attractive Sense of Place

Economic development opportunities of the future are increasingly less tied to a community's physical assets and more to the people that live and work there. The strategic direction outlined below focuses on enhancing the sense of place in North Cowichan to make it more desirable for both new and current residents. This is aimed at boosting economic development opportunities which are increasingly reliant on the community's human resources rather than just physical assets. Continuing to build sense of place through public and private amenities, housing options, transportation linkages, and more will make North Cowichan more desirable for new and current residents.

Action Items	Implementation	Management
1. Improve transportation linkages and connectivity	<i>Implementation steps</i> - Implement the Master Transportation Plan. - Collaborate with transit authorities, local government, and community organizations to align goals and plans. - Explore application and potential for ride-hailing and rail use. - Arrange meetings with transportation stakeholders to discuss improvement opportunities and develop plans to address outcomes. - Support regional projects to implement signage, information points, and digital resources to aid travelers.	Priority: Medium Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> - Increase in customer satisfaction rates. - Availability of routes/connectivity rates to major destinations. - Number of new signage and information points installed. - Increase in transit ridership.	
2. Expand availability of a range of housing options	<i>Implementation steps</i> - Conduct meetings with private and non-profit housing developers, local prefab companies, and community groups to discuss potential projects and partnerships. - Analyze current municipal policies and identify reforms to encourage accessory dwelling units and support recycled home relocations. - Create regulatory and procedural pathways to facilitate non-traditional housing forms and innovative solutions. - Launch pilot projects in partnership with developers and track progress and outcomes.	Priority: Medium Timing: Long-term Cost: \$\$

Action Items	Implementation	Management
	<i>Performance measures</i> - Number of meetings held with stakeholders (housing developers, prefab companies, community groups). - Number of municipal policies reviewed and actioned (if required). - Number of pilot projects launched.	
3. Support development of recruitment-focused information tools	<i>Implementation steps</i> - Collaborate with regional stakeholders to identify the specific skills gaps and recruitment needs of local businesses. - Develop and launch information tools tailored to the identified needs, such as websites, brochures, and online platforms. - Actively promote these tools among businesses and gather feedback for continuous improvement.	Priority: Medium Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> - Implementation of planned information tools. - Increase in the number of visits, average time spent, and user interactions on the digital tools - Increase in local employer retention rates.	
4. Enhance and develop new sports and recreational facilities	<i>Implementation steps</i> - Continue to implement Parks and Trails Master Plan, with emphasis on facilities and amenities with tourism appeal, including trails - Assess satisfaction of existing recreation services through citizen satisfaction survey. - Leverage the Rowing Canada national training centre on Quamichan Lake to develop complementary recreational amenities and commercial/food and beverage services to capitalize on lake visitation and viewing - Regularly assess usage and satisfaction to guide future improvements. - Explore development of amenity facilities for recreation supported business development	Priority: Medium Timing: Long-term Cost: \$\$\$
	<i>Performance measures</i> - Number of facilities developed or enhanced. - Reduction in the incidence of maintenance issues. - Increase in user satisfaction, measured through consultation or surveys.	

Action Items	Implementation	Management
Funding Programs • Employment and Social Development Canada – <i>Canada Retraining and Opportunities Initiative</i> • Employment and Social Development Canada – <i>Canada Summer Jobs wage subsidy</i> • Housing, Infrastructure and Communities Canada – <i>Canada Housing Infrastructure Fund</i> • BC Ministry of Housing and Municipal Affairs - <i>The Community Recreation program</i> • BC Ministry of Infrastructure – <i>Infrastructure Planning Grant program</i> • BC Ministry of Infrastructure – <i>Growing Communities Fund</i> • BC Ministry of Transportation and Transit – <i>Passenger Transportation Accessibility Program</i> • Outdoor Recreation Council of BC – <i>Outdoor Recreation Fund</i> • BC Housing – <i>Building BC: Community Housing Fund</i>		

Strategic Priority #5 – Support the Widespread Adoption of Regenerative Economic Principles

The MNC's Climate Action & Energy Plan sets out seven categories of action, including compact, complete communities, efficient buildings and low-carbon industry, agriculture and forestry to support achieving an 80% reduction in emissions by 2050. Regenerative economic development is in alignment with these objectives through maintaining local resources and capital within the community at their highest and best use and supporting the development of low-carbon intensive industries and infrastructure.

Action Items	Implementation	Management
1. Prioritize municipal procurement of local, regenerative products	<i>Implementation steps</i> - Review MNC's procurement policy to prioritize procurement of locally-made regenerative products for city' operations, services and internal use. - Develop and maintain an inventory of locally-produced products and services that meet regenerative requirements.	Priority: High Timing: Medium-term Cost: \$\$
	<i>Performance measures</i> Amendments to MNC's procurement policies. Increased dollar value of locally procured products across all sectors and government departments that are regenerative or support regenerative outcomes (e.g. low-carbon materials produced in the CVRD).	
2. Introduce policy to advance regenerative practices	<i>Implementation steps</i> - Create a clear policy plan for all major local industries to promote regenerative practices. - Create action plan to support economic opportunities tied to material diversion. - Implement regenerative urban design and community-scale renewable energy systems.	Priority: High Timing: Long-term Cost: \$\$
	<i>Performance measures</i> - Creation of local regenerative policy roadmap. - Develop Material Diversion Economic Opportunities Action Plan	
3. Support industry-led regenerative initiatives	<i>Implementation steps</i> - Encourage continued regional support for industry-led regenerative programs and initiatives across sectors, such as the Vancouver Island Building Materials Exchange. - Direct local companies to the Synergy Foundation's Project Zero (circular business incubator) and Light House's Circular Construction Accelerator. - Showcase local companies that produce regenerative products and technologies.	Priority: Medium Timing: Short-term Cost: \$
	<i>Performance measures</i> - Financial support for industry-led programs - Number of local companies that register for industry-led programs - Number of endorsements - Number of media interactions for North Cowichan and showcased companies	

Action Items	Implementation	Management
4. Facilitate community dialogue on a regenerative economy	<i>Implementation steps</i> Host a workshop with support from appropriate organizations to explore possibilities for introducing more regenerative practices amongst local businesses.	Priority: Medium
	<i>Performance measures</i> - Completion of workshop - Number of attendees	Timing: Short-term Cost: \$
5. Embed regenerative principles into local tourism strategy.	<i>Implementation steps</i> Support local tourism businesses participation to participate in existing regional programs that support the integration of regenerative principles into local tourism, following Destination Greater Victoria's model reducing environmental impacts and creating new economic opportunities.	Priority: Medium
	<i>Performance measures</i> Participation from local tourism businesses in local tourism initiatives that incorporate regenerative elements.	Timing: Medium-term Cost: \$
Funding Programs - Pacific Economic Development Canada – <i>Community Economic Development and Diversification program</i> - Pacific Economic Development Canada – <i>Regional Innovation Ecosystems program</i> - Federation of Canadian Municipalities – <i>Green Municipal Fund</i>		

Implementation Summary

Timing	Action Item	Priority (number)
Short-term		
	Collaborate with local First Nations on economic development initiatives	1 (1)
	Support businesses mitigate the impact of tariffs	2 (1)
	Evaluate and update zoning bylaw	1 (3)
	Streamline development approvals process	1 (2)
	Upgrade infrastructure capacity to enable develop	1 (6)
	Clarify economic development responsibilities	1 (4)
	Increase public messaging with the local business community	1 (5)
	Continue to advocate for the retention of major forestry-based employers	2 (3)
	Explore revenue-generating opportunities in the Municipal Forest Reserve, in collaboration with Quw'utsun First Nation	2 (5)
	Support industry-led regenerative initiatives	5 (3)
	Facilitate community dialogue on a regenerative community	5 (4)
	Ensure that noteworthy tourist attractions in North Cowichan are fully represented in regional Tourism Cowichan promotions	2 (8)
	Consult with the Cowichan Exhibition Society to determine whether the Exhibition Grounds require assistance, including promotion from the Municipality	2 (14)
Medium-term		
	Seek partnerships and opportunities to diversify under-utilized mill sites	2 (2)
	Improve childcare capacity for working families	3 (1)
	Prioritize municipal procurement of local, regenerative products	5 (1)
	Increase awareness of business advisory opportunities	1 (7)
	Continue supporting initiatives to address public disorder challenges in the Highway 1 Corridor	1 (8)
	Encourage consumption of local and national products	1 (9)
	Provide resources for local tourism development initiatives	2 (9)
	Support agriculture economy-related initiatives including food processing expansion	2 (4)
	Support the development of cooperative enterprises	3 (2)
	Embed regenerative principles into local tourism strategy	5 (5)
	Employ policy and fiscal tools to invest in local business revitalization	1 (11)
	Build North Cowichan visitor packages that link multiple local companies	2 (11)
	Support appropriate levels of tourism in traditionally high-traffic areas such as Chemainus	2 (12)
	Foster the development of a professional / knowledge-based community in North Cowichan	3 (3)

Timing	Action Item	Priority (number)
	Improve transportation linkages and connectivity	4 (1)
	Support development of recruitment-focused information tools	4 (3)
	Continue the implementation of Local Area Plans	1 (12)
	Continue to promote North Cowichan's identify as an attractive destination for visitors as well as prospective residents	2 (13)
	Capitalize on the new Cowichan District Hospital	3 (6)
	Work with provincial partners to support expansion of agri-tourism operations	2 (15)
Long-term		
	Introduce policy to advance regenerative practices	5 (2)
	Collaborate with the Ministry of Transportation and Infrastructure on highway improvement projects	1 (10)
	Expand post-secondary and other training opportunities	3 (4)
	Support the creation of a Regional Growth Strategy	2 (13)
	Explore the potential for an eco-industrial park (EIP)	3 (5)
	Explore opportunities to support manufacturing businesses	2 (6)
	Enhance and develop new sports and recreational facilities	4 (4)
	Expand availability of a range of housing options	4 (2)
	Expand range of accommodation options	2 (10)

Appendix A: Statistical Profile

This Appendix contains a variety of economic and demographic data that were analyzed over the course of the project to provide insight into the characteristics and evolution of the North Cowichan economy, as well as comparative strengths and weaknesses compared to similar communities.

This strategic plan is designed to positively influence the future development of the community and should start with an understanding of current conditions and how North Cowichan has changed over recent years.

Industrial Specialization

The following charts outlines industries by the concentration of jobs relative to the province of British Columbia. To determine job concentrations, a location quotient (LQ) analysis was completed. This analysis compares an industry’s share of total jobs in North Cowichan to its share of total jobs in BC. Where the North Cowichan share is higher, the industry is more concentrated (more specialized) in the local community and North Cowichan is considered to have a comparative advantage in this industry. This analysis was completed at industry sector (3-digit) level of NAICS (the North American Industrial Classification System).

Most specialized industries in North Cowichan, relative to BC average

Using estimated local employment data from Lightcast, the most specialized industry in North Cowichan at the three-digit NAICS level is paper manufacturing, with a location quotient concentration of 13.53. These figures were clearly measured prior to the announced closure of the Paper Excellence paper mill early in 2024, but the concentration more than 13 times higher than the BC average is a testament to the historical importance of this industry to the local economy.

Other related industries to paper manufacturing that also have high concentrations of jobs are forestry and logging (8.95 LQ) and wood product manufacturing (2.15 LQ). Combined, these industries made up more than 1,000 jobs in the community, or 7% of all jobs, prior to the recent changes. The industries listed in the following table are the most concentrated industries in North Cowichan and include a variety of other manufacturing.

Table A-1: Most specialized industries in North Cowichan, relative to BC average

NAICS (3 Digit)	Industries Description	North Cowichan Jobs, 2024	Concentration relative to BC (Average = 1.00)
322	Paper manufacturing	349	13.53
113	Forestry and logging	468	8.95
114	Fishing, hunting and trapping	77	8.76
712	Heritage institutions	84	4.50
562	Waste management and remediation services	123	3.36
444	Building material and garden equipment and supplies dealers	300	3.13
333	Machinery manufacturing	158	3.07
323	Printing and related support activities	56	2.84
452	General merchandise stores	414	2.73
327	Non-metallic mineral product manufacturing	77	2.50
321	Wood product manufacturing	227	2.15
622	Hospitals	768	1.91
443	Electronics and appliance stores	43	1.89
418	Miscellaneous merchant wholesalers	107	1.84
519	Other information services	46	1.73

Source: Lightcast, Datarun 2024.1

Largest industries with average specialization in North Cowichan, relative to BC average

For the next table, industries with a location quotient concentration between 0.85 (15% less than BC) and 1.25 (25% more than BC) have been characterized as having average specialization. This means they have about as common locally as they are across the BC economy and indicate no particular specialization or absence.

Table A-2: Largest industries with average specialization in North Cowichan, relative to BC average

NAICS (3 Digit)	Industries Description	Jobs Based in North Cowichan, 2024	Concentration relative to BC (Average = 1.00)
237	Heavy and civil engineering construction	173	1.23
336	Transportation equipment manufacturing	50	1.18
713	Amusement, gambling and recreation industries	219	1.09
711	Performing arts, spectator sports and related industries	127	1.09
236	Construction of buildings	382	1.06
484	Truck transportation	178	1.05
339	Miscellaneous manufacturing	48	1.05
611	Educational services	989	1.04
332	Fabricated metal product manufacturing	59	0.98
914	Aboriginal public administration	61	0.97
115	Support activities for agriculture and forestry	33	0.95
561	Administrative and support services	611	0.92
445	Food and beverage stores	357	0.91
813	Religious, grant-making, civic, and professional and similar organizations	166	0.88
413	Food, beverage and tobacco merchant wholesalers	91	0.88
722	Food services and drinking places	835	0.87
531	Real estate	251	0.86
511	Publishing industries	55	0.86

Source: Lightcast, Datarun 2024.1

Least specialized industries in North Cowichan, relative to BC average

The industry with the lowest relative concentration of jobs in North Cowichan is food manufacturing (0.27 LQ). Industries with a low concentration of jobs may not be well-suited to the local economy based on factors such as geography or available skills in the area. This is definitely not the case for food manufacturing, however, given the base level of agriculture in the community, the market for locally-produced food products, and the supportive infrastructure for food processing development. It does indicate, however, that there is substantial room for growth before food manufacturing reaches even an average level of concentration in North Cowichan.

The other industry of note in the following table is professional, scientific and technical services. It is quite large in absolute numbers with more than 600 jobs, but has only half the concentration of the BC average. This is a valuable industry for larger rural communities as there is typically a concentration of professionals like lawyers, accountants, engineers and architects that locate in regional centres and provide an important element of knowledge-based and well-paying employment. This industry is currently not well represented in North Cowichan.

Table A-3: Least specialized industries in North Cowichan, relative to BC average, based on “fixed place of work” jobs

NAICS (3 Digit)	Industries Description	Jobs Based in North Cowichan, 2024	Concentration relative to BC (Average = 1.00)
451	Sporting goods, hobby, book and music stores	51	0.69
524	Insurance carriers and related activities	111	0.67
238	Specialty trade contractors	457	0.66
911	Federal government public administration	139	0.65
221	Utilities	35	0.62
522	Credit intermediation and related activities	129	0.55
453	Miscellaneous store retailers	56	0.54
541	Professional, scientific and technical services	630	0.49
523	Securities, commodity contracts, and other financial investment and related activities	46	0.37
446	Health and personal care stores	49	0.29
311	Food manufacturing	38	0.27

Source: Lightcast, Datarun 2024.1

Benchmarking

Benchmarking North Cowichan to a set of similar communities is a useful way to identify its unique characteristics and comparative strengths and weaknesses within the broader regional economy.

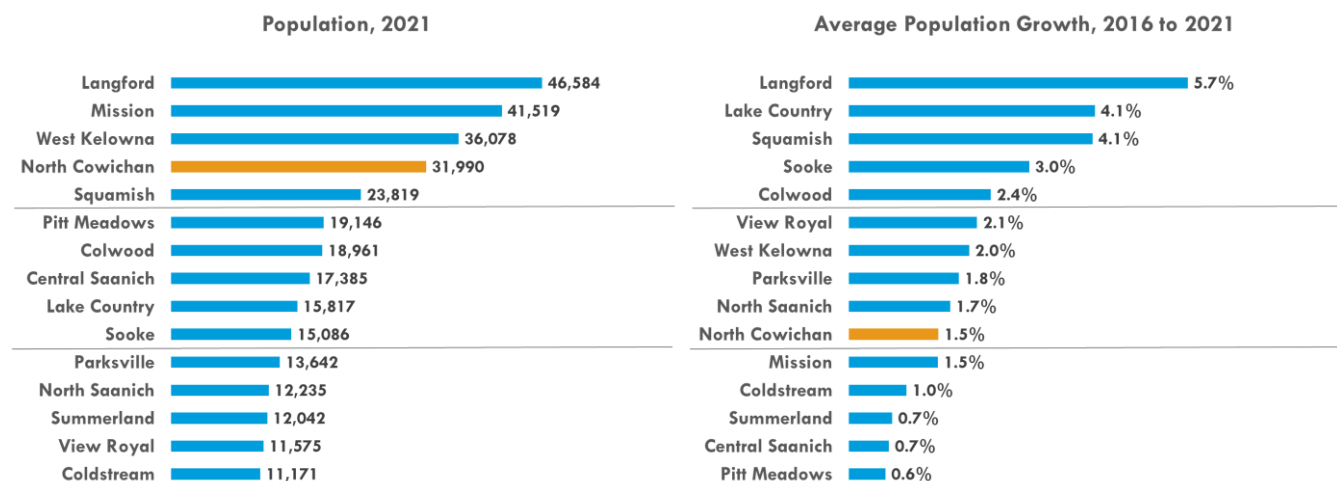
For most data topics, North Cowichan is compared against a consistent group of communities chosen for their proximity to North Cowichan and their similar population size. It should be noted that most of the comparators are closer to larger metropolitan areas. The comparator communities are:

- North Cowichan
- Central Saanich
- Coldstream
- Colwood
- Lake Country
- Langford
- Mission
- North Saanich
- Parksville
- Pitt Meadows
- Sooke
- Squamish
- Summerland
- View Royal
- West Kelowna

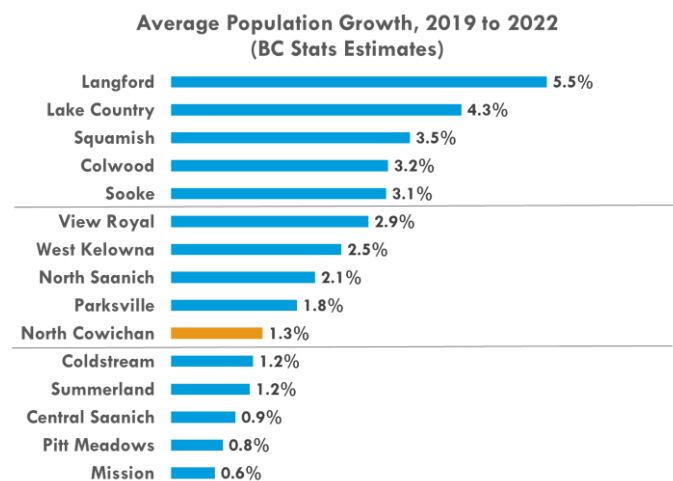
The following charts are Census-based comparisons unless otherwise noted.

Population

In 2021, North Cowichan's had a population of 31,990. The population has increased by 2,294 residents since 2016 or 7.7%. During this period, North Cowichan's population grew at an average rate of 1.5% per year. This was the sixth smallest increase in population among comparator communities. Of the other four largest comparator communities, only Mission had a lower yearly average increase in population growth. Langford, the largest compared population centre, saw the largest average yearly increase in population at 5.7%.



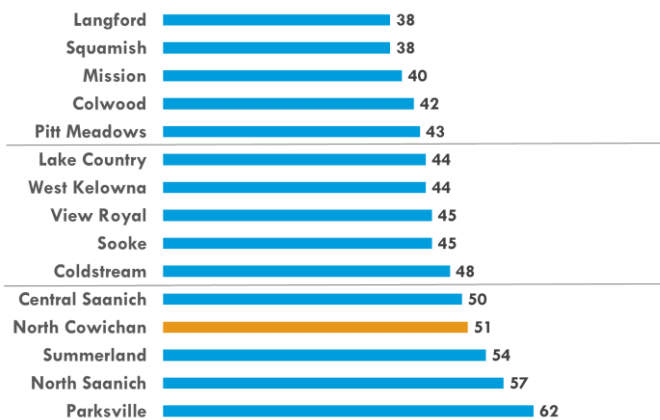
Population estimates from the province of British Columbia indicate similar yearly population growth percentages compared to the Canadian Census data. Provincial data from British Columbia show that North Cowichan's population grew at an average rate of 1.3% per year as opposed to the 1.5% growth figure from the Canadian Census.



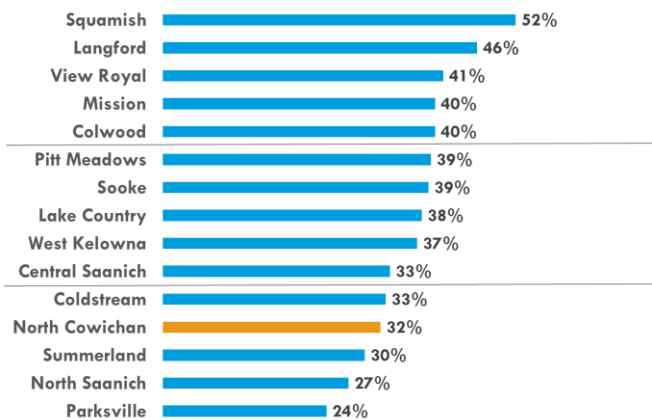
Population Age

North Cowichan has the fourth oldest median age of all comparator communities at 51 years old. This is 13 years older than Langford. Contributing to this North Cowichan's relatively older demographics is its low percentage of population in their prime working age (25-54) at 32%. Comparatively, Squamish has the highest percentage of its population in their prime working age at 52%.

Median age of the population, 2021

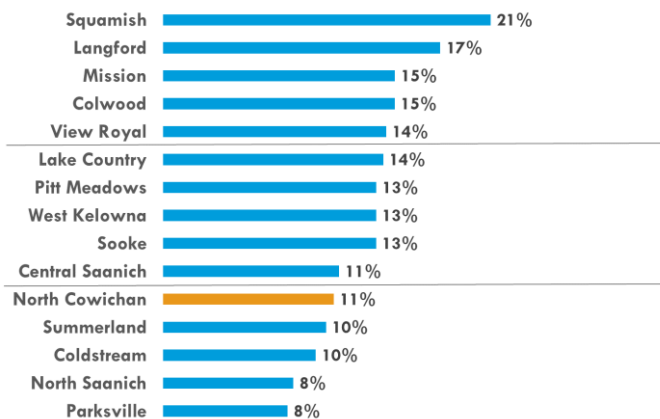


Population of Prime Working Age (25-54), 2021

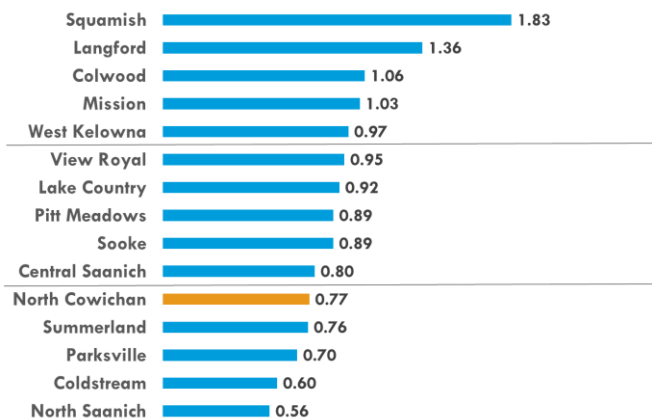


Continuing this trend, North Cowichan has the fifth lowest percentage of its population in their thirties at 11%, the same percentage as Central Saanich. Squamish and Langford have the largest percentage of their population in their thirties at 17% and 15% respectively. North Cowichan has a ratio of 0.77 of the population in thirties compared to their fifties. This is an indication that as the current experienced workforce in its 50s moves toward retirement and less participation in the labour force, there may not currently be enough younger workers to replace them.

Population in their 30s, 2021

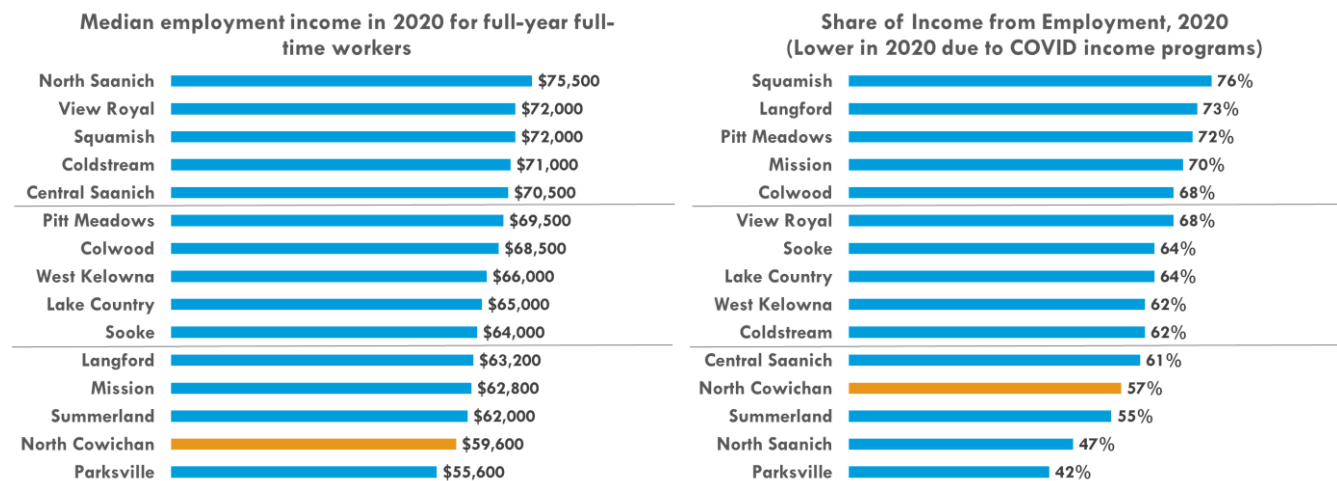


Ratio of Population in their 30s to their 50s, 2021

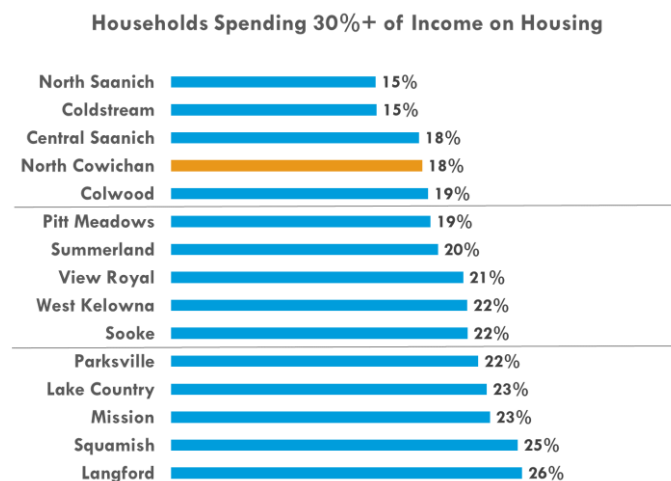


Employment Income

North Cowichan had the second lowest median employment income in 2020 for full-time workers at \$59,600. Only Parksville had a lower median income in the comparator communities. North Cowichan also had the fourth lowest share of total income from employment in 2020 at 57%. This indicates that there was a higher reliance on government programs or retirement income than other comparator communities.



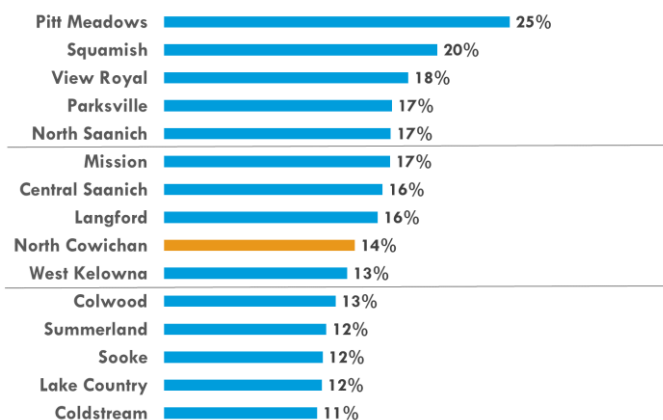
Even with a lower median wage compared to other similar communities, North Cowichan has a lower percentage of residents spending over 30% of their income on housing (18%). Spending 30% or less of income on housing is an indicator of housing affordability.



Immigration

In 2021, 14% of North Cowichan's population was immigrants to Canada. This is similar to other larger population centre comparators such as Langford (16%), Mission (17%), and West Kelowna (14%).

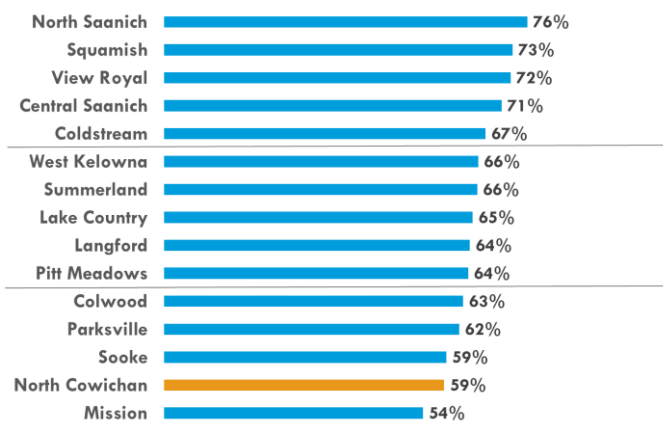
Immigrants as Share of Population, 2021



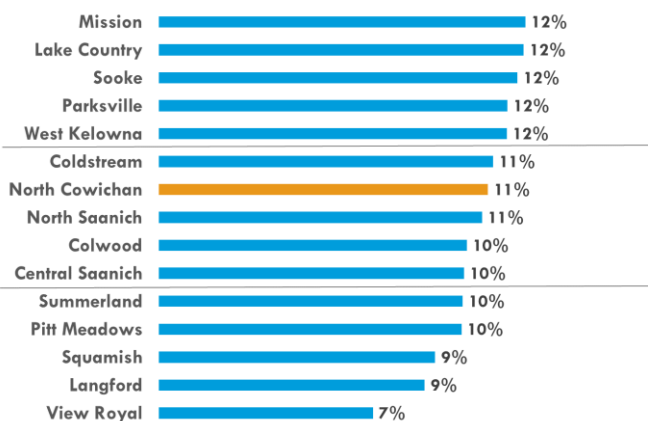
Educational Attainment

North Cowichan has a relatively low percentage of its population between the ages of 25 and 64 with any post-secondary credential (59%). However, in the same age bracket, North Cowichan has 11% of its population with a trades or apprenticeship credential which is similar to the other comparator communities.

Age 25 to 64 with any post-secondary credential, 2021



Age 25 to 64 with trades or apprenticeship credential, 2021



Appendix B: Eco-Industrial Park Brief

Provided under separate cover.

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