



EMPLOYMENT LANDS FINAL REPORT

UNDERSTANDING SUPPLY, DEMAND, & UTILIZATION OF WEALTH

GENERATING LANDS IN THE COLUMBIA BASIN-BOUNDARY REGION OF BC

FALL 2014



The Columbia Basin Rural Development Institute, at Selkirk College, is a regional research centre that supports informed decision-making by Columbia Basin-Boundary communities through the provision of information, applied research and related outreach and extension support. Visit www.cbrdi.ca for more information.

EXECUTIVE SUMMARY

The purpose of this research project was to better understand the landscape of wealth generating lands in the Columbia Basin-Boundary region of BC. An integrated economic development-geospatial lands analysis was undertaken to better understand opportunities and constraints related to 'employment lands' in the region. With an improved regional-level understanding of the 'employment lands' landscape, the region will be in a better position to attract and retain business and investment. This research also supports informed land use planning.

The project drew primarily on three datasets to explore land supply and possible constraints, including: government cadastral data from local sources and the Integrated Cadastral Information Society (ICIS), BC Assessment data, and business retention and expansion (BRE) data. Cadastral and BC Assessment data was used to better understand land supply and BRE data was used to better understand demand. Supplemental data generated from interactions with economic development practitioners and from statistical data sources were used to better understand the regional economy and related economic capacity considerations.

The regional economy is in its third year of recovery since the recession. The overall employment level has now surpassed the pre-recession high. Job growth fuelled by the service sector, the continued shift toward full-time employment, and a significant decrease in business bankruptcies are all positive developments. Investment in major capital projects is also on the rise, and data from the Invest Kootenay Partnership (IKP) evidences an increase in regionally supported investment attraction with the IKP supporting 32 investments totalling \$6.5 million over the last 5 years.

Findings from interviews and online surveys administered to 684 businesses from across the region highlight possible regional economic assets and gaps. Findings suggest access to suppliers and markets (including proximity to the US border and couriers), highway and road infrastructure, inspections and licensing, and waste management are key government services assets. Findings also suggest possible gaps exist in the availability of warehousing, key infrastructure assets (access to port facilities, rail transport, airport access, telecommunications), development approval processes, and the availability of lands for expansion (appropriately zoned lands for lease or sale). Business climate factors related to workforce development (K-12, Colleges, workforce quality), workforce attraction and retention (cultural and recreation amenities), and business supports (Community Futures, Chambers of Commerce) are key business climate assets. Findings also suggest gaps exist within some aspects of workforce development (technical training), workforce attraction and retention (availability and stability, housing), business supports (Business Improvement Areas, tourism services), and economic development (local tax structure, local business climate, local government).

Economic development practitioners (EDPs) provided their collective rating on indicators related to economic development capacity at an annual gathering of EDPs from across the region. Data generated suggest that the region has a track record of successful economic development projects, communities are connected with in-region business supports, there is a commitment to economic development on behalf of local leadership, and there are diverse stakeholders involved in economic development. Capacity challenges are apparent with respect to knowledge of economic development by elected officials and local government staff, and a lack of history of cross-sectoral collaboration on community projects.

Findings suggest there is an adequate supply of commercial and industrial lands in the majority of the regions' corridors. It is important to note that this analysis did not include an analysis of topographic data or real estate data and therefore it is unclear if the identified vacant land supply is on a useable slope and / or is available for sale or lease. There are a total of 536 vacant commercial parcels covering 4,447 hectares of land and 477 vacant industrial parcels covering 16,770 hectares of land. There appear to be some constraints on the commercial land supply in the Elk Valley with only 8 vacant parcels and 37 hectares of land identified. There also appear to be some possible limitations to the industrial lands supply in the Elk Valley (only 2 parcels and 8 hectares of land vacant) and Columbia Valley Corridors (only 2 parcels and 210 hectares of land vacant), although findings at this stage are inconclusive for these corridors due to missing zoning data from Canal Flats, Elkford, Fernie, and Invermere. It should be noted that real estate listing data was not available at the time of report writing and it is therefore unknown how many of these parcels are available for purchase or lease.

Availability of commercial lands within municipalities is often preferred as the retail sector relies on proximity to customers. The majority (83%) of vacant commercial parcels (447 of 536 parcels) and 65% of commercial land area (2,883 of 4,447 hectares) is located within municipalities. 75% of vacant industrial parcels (358 of 477) and 17% of available industrial land area (2,772 of 16,770 hectares) is located within municipalities. Findings suggest that there may be a limited supply of commercial lands available within municipalities within the Elk Valley Corridor, although it is important again to note that zoning data was not available for Fernie or Elkford at the time of report writing and as a result the strength of findings related to this corridor is limited.

High concentrations of industrial lands within municipalities can create challenges as they can sometimes conflict with residential use. Findings reveal relatively high concentrations of vacant industrial lands within municipal boundaries in the Elk Valley Corridor (2 of 2 parcels, 8 of 8 hectares), Revelstoke Corridor (24 of 25 parcels, 365 of 430 hectares), Southeast Kootenay Corridor (70 of 81 parcels, 478 of 1,772 hectares) and West Kootenay Corridors (245 of 313 hectares, 1,863 of 4,448 hectares). It is important to note that a number of regional district areas do not have zoning and therefore have an impact on this level of analysis.

There is a relatively limited supply of vacant federal and provincial crown commercial lands, with the exception of 17 parcels in the Boundary Corridor covering a land area of 111 hectares. There is also a limited supply of vacant federal and provincial crown industrial lands, with the exception of 46 parcels in the West Kootenay Corridor covering 2,939 hectares and 28 parcels in the Boundary Corridor covering 4,097 hectares. It is important to note that the majority of vacant parcels are provincial crown lands. There is also a relatively limited supply of vacant municipal commercial land with the exception of 54 West Kootenay Corridor parcels covering 34 hectares and 39 commercial parcels in the Boundary Corridor covering 60 hectares. There is also a limited supply of vacant municipal industrial lands, with the exception of 24 parcels in the Boundary Corridor covering 1,232 hectares and 30 parcels in the West Kootenay Corridor covering 111 hectares.

While business retention and expansion (BRE) data generated from interviews with businesses in the region suggest that a lack of appropriately zoned lands may be a barrier to expansion in some areas and for some sectors, a cross-analysis against existing vacant lands suggests that the barrier may be more of a matching problem. There is an ample supply of vacant commercial lands in all communities where retail trade companies reported a barrier to expansion. Further, there is an ample supply of vacant industrial lands in all communities where manufacturing companies reported a barrier to expansion, with the exception of the Elk Valley Corridor where the supply of industrial land is limited. It is important to note that while this analysis identifies vacant lands, available data did not allow for the identification of vacant lands that are for sale.

Data suggest that, in general, the region's commercial and industrial lands are effectively being utilized, and there is an ample supply of available lands for expansion and new investment. 95% of the regions' commercial parcels (9,493 of 10,029) are being utilized, including 66% of the commercial land base (76,436 of 80,884 hectares). 75% of the regions' industrial parcels (1425 of 1902) are being utilized, including 81% of the industrial land base (72,679 of 89,446 hectares). There may, however, be some overutilization / constraints to expansion and new investment of commercial lands in the Elk Valley, Columbia Valley and Valemount Corridors and of industrial lands in the Elk Valley Corridor. Commercial lands also appear to be somewhat underutilized in the Valemount Corridor and industrial lands appear to be somewhat underutilized in the West Kootenay, Boundary and Valemount Corridors. In terms of constraints to use, data suggest primary factors that may constrain the use of available employment lands include conflicting land use in cases where impact may impede adjacent lands (i.e. watersheds) and the presence or absence of an Official Community Plan (investors prefer clear land use designations and restrictions).

In order to facilitate expansion and new investment in light of findings that suggest a matching problem between investors and available lands, a site selector tool was developed. Existing businesses, new investors and economic development practitioners are encouraged to use and provide feedback on this tool. Also, the utility of the inventory and relevance of related tools is dependent on accurate and up-to-date data. Planning departments are encouraged to work with the RDI to address identified data gaps and to continue to provide requested data on an annual basis. Finally, the region is encouraged to engage in development planning processes at a regional scale in order to capture landscape level land use opportunities and possible conflicts.

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INTRODUCTION

The purpose of this research project was to better understand the landscape of wealth generating lands in the Columbia Basin-Boundary region of BC. With an improved regional-level understanding of the region's 'employment lands' landscape, the region will be in a better position to make informed land use decisions and attract and retain business and investment. The project aimed to explore assets and gaps in the region's employment lands landscape, assess whether employment lands can accommodate investment and business growth, and explore the utilization of existing employment lands.

Researchers from the Columbia Basin Rural Development Institute (RDI) and Selkirk Geospatial Research Centre (SGRC) at Selkirk College worked under the guidance of a regional advisory committee and the project sponsor: Community Futures East Kootenay. Community Futures East Kootenay, the Province of BC, the Southern Interior Beetle Action Coalition, and Columbia Basin Trust provided funding for this 2-year applied research project. The primary goals of the project were to:

- produce a regional baseline employment lands, infrastructure and related economic assets inventory database and web-based geospatial tool,
- assess whether there is an adequate inventory (supply) of employment lands available for the development of new or expanding investment and job creation,
- bring together key stakeholders to generate regional discussion and analysis of the employment lands landscape, and
- create a geospatial site selector tool designed to identify land parcels demonstrating user-specified attributes.

The following questions guided the research:

1. What assets and gaps exist in the region's employment lands inventory?
2. Can the region's employment lands accommodate investment and business growth?
3. Are there areas where existing employment lands are being underutilized?
4. What factors might constrain the use of employment lands?

Primary data sources included cadastral data from local governments¹ and the Integrated Cadastral Information Society (ICIS), BC Assessment Roll data, and data generated from the Regional Business Retention and Expansion project. Preliminary findings were presented to local government representatives and economic development practitioners at six regional forums held in May 2014 allowing key stakeholders the opportunity to validate and discuss results. This report provides an overview of the regional economy, research methodology, and project results according to guiding research questions. It also presents opportunities for future research and policy considerations.

REGIONAL ECONOMY

Located in the southeast corner of British Columbia, the Basin-Boundary region includes the Regional Districts of East Kootenay, Central Kootenay and Kootenay Boundary (collectively, the Kootenay Development Region), in addition to Revelstoke, Golden, Valemount and Columbia Shuswap Regional District Areas A and B. With a population of 161,741 and an approximate land area of 83,171 sq. km, the region accounts for 3.7% of the population and 9% of the area of British Columbia. The regional economy is primarily resource-based with forestry and mining as key economic drivers, alongside tourism.

This profile relies on the Kootenay Development Region to represent the Basin-Boundary region as a whole. Northern portions of the Basin-Boundary region are included in the Thompson-Okanagan and

¹ Multi-year data sharing agreements are now in place with regional districts and municipalities in the region.

Cariboo Development Regions, both of which include major economic centres (Kelowna and Prince George, respectively) within their borders. Employment figures for the Thompson-Okanagan and Cariboo Development Regions are often heavily influenced by these major centres, and therefore not representative of the majority of the Basin-Boundary region.

As highlighted in Table 1, the Kootenay Development Region economy employs 77,900 people. The largest goods-producing sectors are construction (7,600 jobs), forestry, fishing, mining, oil and gas (6,200), and manufacturing (5,700). The largest service-producing sectors are trade (12,600), health care and social assistance (10,700), and accommodation and food services (7,400) ².

Table 1. Employment, Kootenay Development Region, 2008-2013 (all figures in 000s)

Sector	2008	2009	2010	2011	2012	2013	5 Yr Job Creation
Total, all industries	71.6	71.0	69.4	72.1	74.8	77.9	6.3
Goods-producing sector	22.0	20.8	22.5	21.2	21.5	21.7	-0.3
Construction	8.0	8.5	7.4	8.2	7.7	7.6	-0.4
Forestry, fishing, mining, quarrying, oil and gas	6.9	4.8	5.0	5.3	7.0	6.2	-0.7
Manufacturing	4.7	4.6	7.7	6.1	4.9	5.7	1.0
Agriculture	2.4	2.3	1.7	0.0	0.0	1.6	-0.8
Utilities	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Services-producing sector	49.5	50.2	46.9	50.9	53.2	56.3	6.8
Trade	12.7	14.0	11.8	10.1	10.8	12.6	-0.1
Health care and social assistance	6.1	9.5	8.2	9.2	9.8	10.7	4.6
Accommodation and food services	7.4	5.6	5.7	6.9	6.4	7.4	0.0
Educational services	4.9	3.4	2.9	3.5	5.9	4.6	-0.3
Professional, scientific and technical services	3.5	2.3	2.3	2.7	4.0	3.9	0.4
Transportation and warehousing	3.3	3.0	2.4	3.3	2.6	3.6	0.3
Information, culture and recreation	3.1	1.9	2.7	2.4	2.6	3.3	0.2
Other services	2.8	3.1	2.9	4.0	4.5	2.8	0.0
Finance, insurance, real estate and leasing	2.3	2.7	2.3	2.8	1.8	2.7	0.4
Public administration	1.8	1.9	2.6	2.8	2.7	2.6	0.8
Business, building and other support services	1.6	2.7	3.2	3.2	2.1	2.1	0.5
Unclassified industries	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Between 2012 and 2013, the Kootenay Development Region experienced the creation of 3,100 new jobs primarily in the service-producing sector, marking the third successive year of job growth. A total increase of 6,300 jobs occurred between 2008 and 2013. Primary growth sectors were in the services-producing sector, including health care and social assistance (4,600 jobs), public administration (800), and business, building and other support services (500). Manufacturing also experienced an increase in job growth (1,000) over the last five years³.

The unemployment rate, which measures the number of unemployed individuals as a share of the labour force, fell for the third consecutive year and is now at 5.2%. The region's unemployment rate is

² Source: Statistics Canada. (2014). Labour Force Survey Custom Table.

³ Ibid.

second lowest in the province in comparison to other development regions and is below the provincial average (6.6%)⁴.

Table 2. Business Counts by Industry and # of Employees, Kootenay Development Region, 2013

Sector	Indeterminate ⁵	Less than 20	20 to 49	50 to 199	200 plus	Total with Employees	All Sizes	% of Total No. of Businesses
Total, All Industries	25,221	5,634	421	182	30	6,267	31,488	100.0%
Real Estate & Rental & Leasing	8,905	317	6	4	0	327	9,232	29.3%
Construction	2,577	860	26	10	0	896	3,473	11.0%
Professional, Scientific & Technical Services	2,279	470	15	8	0	493	2,772	8.8%
Agriculture, Forestry, Fishing & Hunting	2,097	347	23	8	0	378	2,475	7.9%
Retail Trade (44-45)	1,276	799	68	26	3	896	2,172	6.9%
Other Services (excl. Public Administration)	1,467	556	14	4	0	574	2,041	6.5%
Health Care & Social Assistance	1,052	493	35	30	6	564	1,616	5.1%
Admin. & Support, Waste Mgmt. & Remediation.	1,150	202	11	6	0	219	1,369	4.3%
Accommodation & Food Services	764	452	89	14	3	558	1,322	4.2%
Arts, Entertainment & Recreation	689	132	16	15	1	164	853	2.7%
Transportation & Warehousing (48-49)	501	263	21	4	1	289	790	2.5%
Manufacturing (31-33)	549	177	21	18	3	219	768	2.4%
Finance & Insurance	526	156	25	7	0	188	714	2.3%
Educational Services	376	48	7	1	6	62	438	1.4%
Wholesale Trade	217	156	18	5	0	179	396	1.3%
Information & Cultural Industries	254	75	12	2	0	89	343	1.1%
Management of Companies & Enterprises	277	35	0	0	0	35	312	1.0%
Mining & Oil & Gas Extraction	183	42	4	1	6	53	236	0.7%
Utilities	65	13	5	6	0	24	89	0.3%
Public Administration	17	41	5	13	1	60	77	0.2%

As detailed in Table 2 and Figure 1, there are 31,488 companies in the Kootenay Development Region, including 5,634 with less than 20 employees. The real estate, rental and leasing sector (29%) has the highest percentage of businesses in the region, followed by construction (11%), professional, scientific, and technical services (9%), agriculture, forestry, fishing and hunting (8%), and retail trade (7%)⁶. Sectors with the highest number of small businesses included construction (860 businesses), retail trade (799), other services (556), and health care and social assistance (493). A limited number of sectors include 'big employer'⁷ companies in the region including health care and social assistance (6 businesses), educational services (6), and mining, oil, and gas extraction (6)⁸.

⁴ Source: Statistics Canada.

⁵ The locations in the "indeterminate" employee count category do not maintain an employee payroll, but may have a workforce which consists of contracted workers, family members or business owners. However, the Business Register does not have this information available, and has therefore assigned the locations to an "indeterminate" category. This category also includes employers who did not have employees in the last 12 months.

⁶ Source: BC Stats. (2014). British Columbia and Regional Totals - Location Counts by NAICS Industry (2007-).

⁷ Employ more than 200 people

⁸ Ibid.

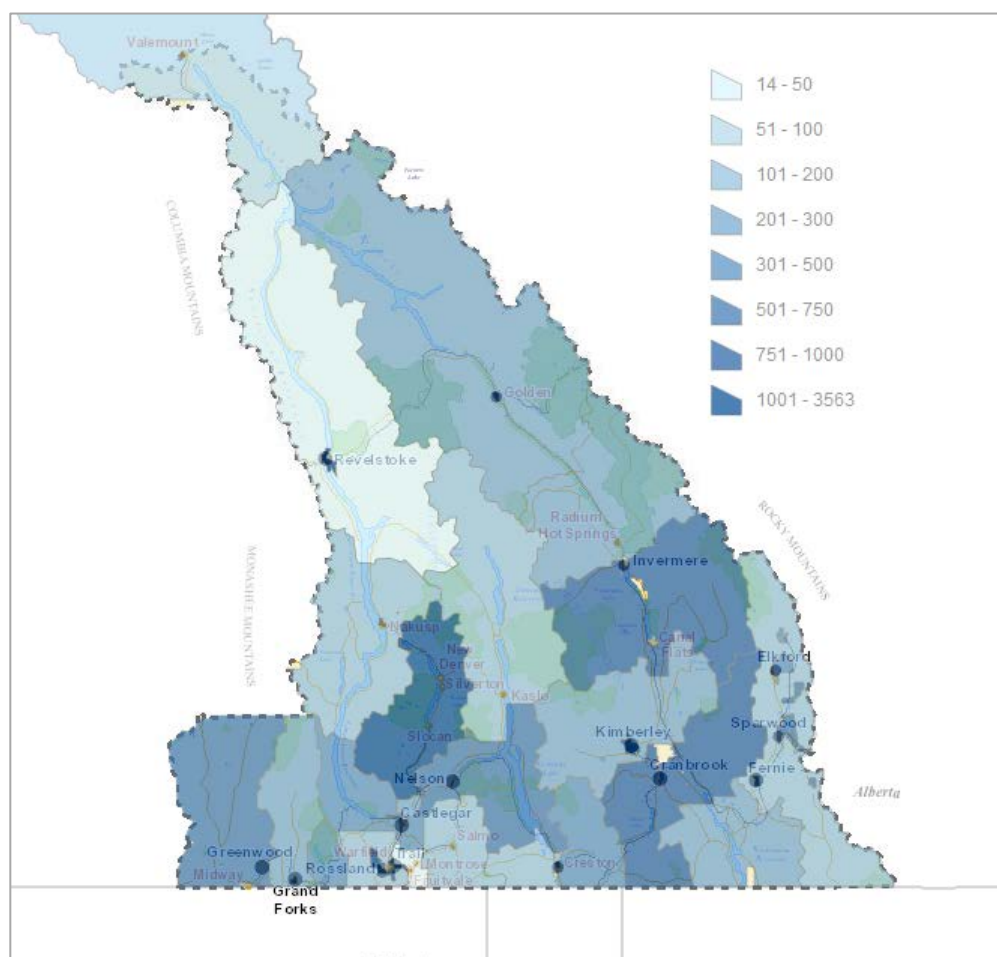


Figure 1. Total Business Counts in the Basin-Boundary Region, 2013.

Currently, major projects within the Kootenay Development Region are valued at over \$9.5 billion. Of these, 14 (\$3.9B) have started construction, 5 (\$2B) are on hold, and 10 (\$3.7B) are proposed. Notable projects underway include the Waneta Hydroelectric Expansion Project (\$900M), expansion of the Red Mountain Ski Resort (\$900M) and development at the Wildstone Golf Resort (\$750M)⁹. Major projects in other portions of the Basin-Boundary region are valued at \$10.2 billion, including the Trans Mountain Pipeline Expansion project (stretching from Edmonton to Burnaby via Valemount), valued at \$5.4 billion.

Business bankruptcies in the region hit a ten-year low in 2013, marking a 68.8% decline from 2008. Data from the Invest Kootenay Partnership (IKP) evidences an increasing number of investments supported by IKP over the last 5 years with 32 investments realized amounting to \$6.5 million.

The regions' labour force has also experienced an increase in educational attainment over the last 5 years (4.9 percentage points), with 58.1% of the population now possessing a post-secondary certificate / diploma or higher. However, it is important to note that educational attainment in the Kootenay Development region is 10 percentage points below the provincial average.

In sum, the regional economy is in its third year of recovery since the recession. The overall employment level has now surpassed the pre-recession high. Job growth fuelled by the service sector, the continued shift toward full-time employment, and significant decrease in business bankruptcies are all positive developments.

⁹ Source: BC Ministry of Finance. BC Major Projects Inventory, June 2014.

METHODOLOGY

In an effort to better understand land supply and demand for wealth generating land in the region, an integrated economic development-geospatial analysis was undertaken. An economic development lens extended the scope of the research to include an exploration of factors beyond the availability of vacant land that may influence decisions related to land use, business expansion and new investment¹⁰. The geospatial analysis allowed for an exploration of lands at the regional, corridor, and Retail Trade Area (RTA) levels. The primary data sets used included relevant data from the regional business retention and expansion (BRE) project database, 2014 BC Assessment Roll data, and cadastral data provided by local governments and the Integrated Cadastral Information Society (ICIS).

BRE data was generated from 8 sector and community-focused BRE projects undertaken by fifteen¹¹ of the region's twenty-eight municipalities and both of the region's innovation councils¹². The Columbia Basin Rural Development Institute (RDI) provided training to community-based BRE researchers to ensure the standardization of data collection methods. The BRE interview survey consists of 107 questions related to the company profile, local workforce, sales, facilities and equipment, and future plans for growth or succession. BRE data was extracted on November 11, 2014 providing data for 684 companies, in 42 communities (incorporated and non), drawn primarily from retail trade, professional services, manufacturing, and accommodation and food services sectors.

The Province of BC provided 2014 Assessment Roll data under a pilot data sharing agreement. BC Assessment's Roll Data, a detailed database of individual properties across BC, contains usage information. The Roll Data is subject to some accuracy issues because detailed information on individual properties is typically updated only after transfer of ownership or major renovations requiring a building permit. Despite this limitation, the Roll Data represents the most comprehensive approach to determining the level of development / usage on a given property. The 2014 Assessment Roll database provided data for 112,636 parcels of land. This dataset was used to identify vacant parcels.

Cadastral data was secured from 4 regional districts¹³ and 10 larger municipalities¹⁴ in the region. Data from the Integrated Cadastral Information Society (ICIS) was used to supplement parcel information and to provide ownership class (i.e. crown lands, private lands) data to supplement the BC Assessment Roll data¹⁵. Data from the Digital Basin portal was also used, primarily data layers associated with buildings, roads, rail, airports, hospitals, schools, government service facilities, services (water, electricity, etc.), political boundaries, Official Community Plans, forest tenures, mining tenures and the agricultural land reserve to better understand the employment lands landscape. The Digital Basin is an online portal providing data, maps and analysis for over 100 assets and indicators relevant to the regions' economic, social, cultural and environmental vitality. In addition, data generated from a regional economic development capacity diagnostic was included as a dataset to further inform economic development related assets and gaps. The diagnostic was administered to 20 Economic Development Practitioners in October 2014 during a meeting of the Kootenay Economic Development Practitioners (KEDP) Network. 48% of EDP respondents were from the West Kootenay Corridor, 33% from the Southeast Corridor, 10% from the Columbia Valley Corridor, 5% from the Elk Valley Corridor, and 5% from the Boundary Corridor.

¹⁰ Including an exploration of related economic development assets (i.e. infrastructure that facilitates economic activity) and factors that may constrain the use of available lands (i.e. proximity to a watershed or residential zone).

¹¹ Grand Forks, Midway, Greenwood, Trail, Rossland, Montrose, Fruitvale, Warfield, Nakusp, Slocan, New Denver, Silverton, Kimberley, Sparwood, and Kaslo.

¹² Kootenay Association for Science and Technology and the Kootenay Rockies Innovation Council.

¹³ Regional District of East Kootenay, Regional District of Central Kootenay, Regional District of Kootenay Boundary, and Columbia Shuswap Regional District

¹⁴ Sparwood, Fernie, Cranbrook Kimberley, Castlegar, Trail, Rossland, Revelstoke, Golden and Valemount

¹⁵ Ownership data was not included under the pilot data sharing agreement with the Province of BC.

Applicable data sets were applied against each research question and analyzed using descriptive statistical and geospatial analysis at the regional, corridor, and Retail Trade Area (RTA) levels. The regional geographic corridors were developed by the RDI in consultation with local government representatives to reflect geographically defined¹⁶ areas where people and product may travel for work, school, or to access health care. The RTAs were determined using a function of a municipality's population and the distance to the next competing (for retail trade) municipality. Please see Appendix B for RTA maps for each of the 28 municipalities in the region.

The data used in this analysis, including regional cadastral data generated from over 30 sources, may have data gaps and errors. Regional and municipal stakeholders, planners, and leaders should evaluate all results against their local knowledge. Aspects of the analyses rely on proxy information. For example, property use codes listed as 'vacant' in the BC Assessment data served as a proxy for an indication of supply and utilization of employment lands. BRE data related to "expansion within the next 3 years" and "lack of appropriately zoned lands" served as a proxy for employment land demand. While the use of proxy data provides some indication of land supply and demand in the region, it has limitations related to accurate vacancy reporting and perceptions reported by only a sample of businesses in the region. It is important to note that while this analysis identifies vacant lands, available data did not allow for the identification of vacant lands that are for sale. Properties were identified as 'vacant' using the BC Assessment Roll data 'actual use' code as assigned by the BCA appraiser.

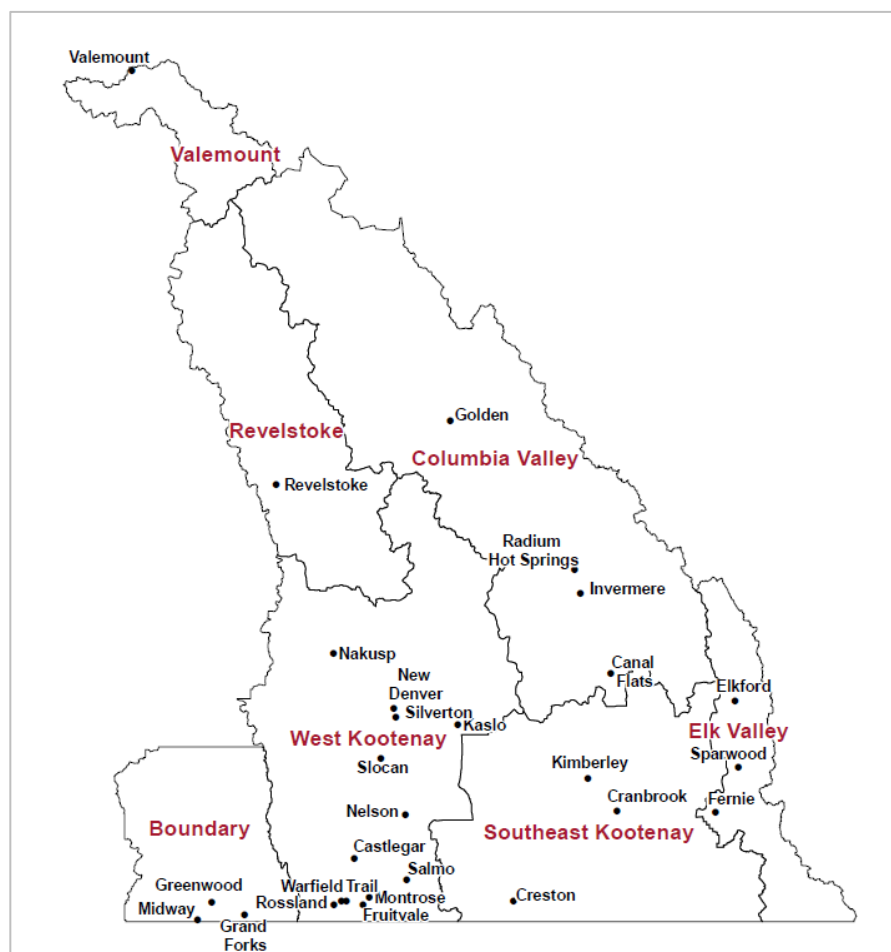


Figure 2. Regional Corridors

¹⁶ Mountains and river valleys shape travel patterns in the region.

RESULTS

REGIONAL ECONOMIC ASSETS AND GAPS

In an effort to understand assets and gaps relevant to business expansion and new investment, a descriptive statistical analysis was applied to the BRE data at a regional level. Data was generated from the 684 companies that were surveyed regarding government services, business climate and barriers to expansion. It is important to note that many businesses either did not respond to certain questions or indicated that a specific service was not applicable to their operations. These businesses have been excluded from the analyses below and results are therefore limited to definitive “excellent”, “good”, “poor”, or “fair” responses. The number of total responses considered in these analyses varies by question.

ACCESS TO MARKETS, REGULATORY FRAMEWORK, INFRASTRUCTURE & LANDS

As detailed in Figure 2, over half of the respondents rated the following services as excellent or good: distance to the US border (84%), highway / road access (83%), water and sewer supply (79%), inspections (eg. licensing) (72%), recycling (72%), disposal of waste material (67%), access to markets (67%), availability of couriers (58%), access to supplies (55%), and telecommunications (54%). Less favourable rankings were provided for access to port facilities (30%), availability of rail transport (35%) and availability of warehousing (38%).

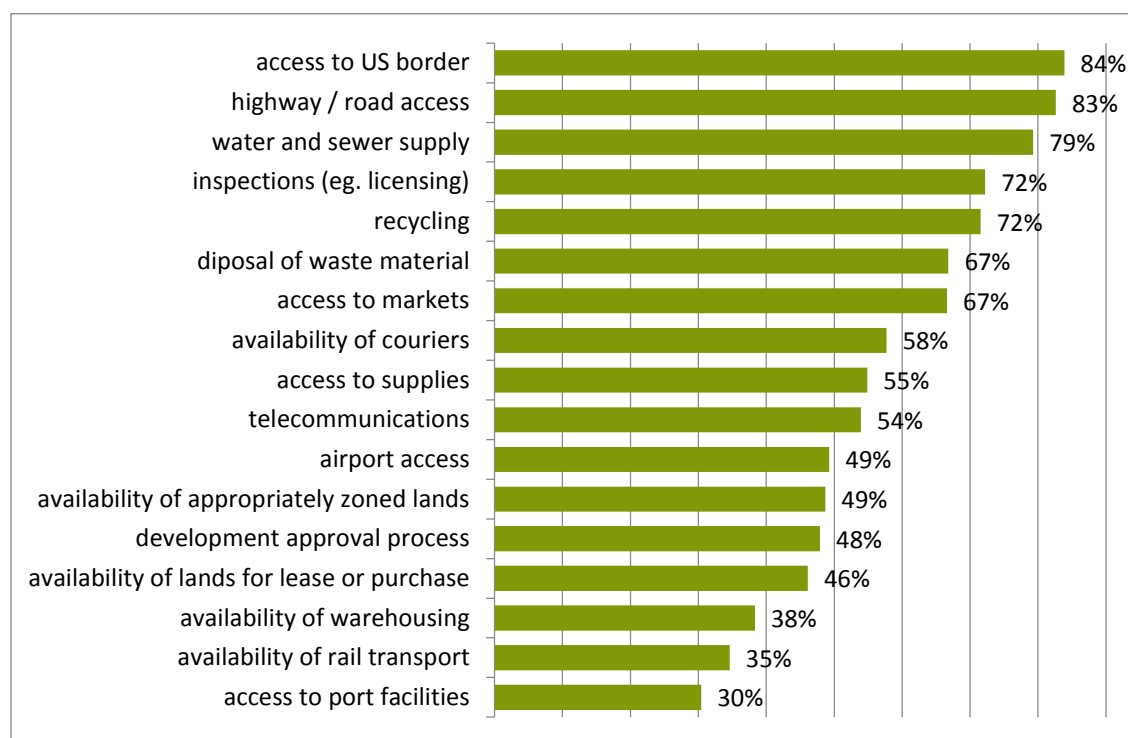


Figure 3. Percentage of Companies Rating Government Services as Excellent or Good

Figure 3 details the percentage of companies ranking government service types as poor or fair. Over half of company respondents ranked the following services as poor or fair: access to port facilities (70%), availability of rail transport (65%), availability of warehousing (62%), availability of lands for lease or purchase (54%), development approval process (52%), availability of appropriately zoned lands (51%), and airport access (51%).

Findings suggest access to suppliers and markets (including proximity to US border and couriers), highway and road infrastructure, inspections and licensing, and waste management are key government services assets. Findings also suggest possible gaps exist in the availability of warehousing, key

infrastructure assets (access to port facilities, rail transport, airport access, telecommunications), development approval processes, and the availability of lands for expansion (appropriately zoned lands, available land for lease or sale). A more in-depth analysis of land demand is considered in the *Lands to Accommodate Business Expansion and Investment* section below.

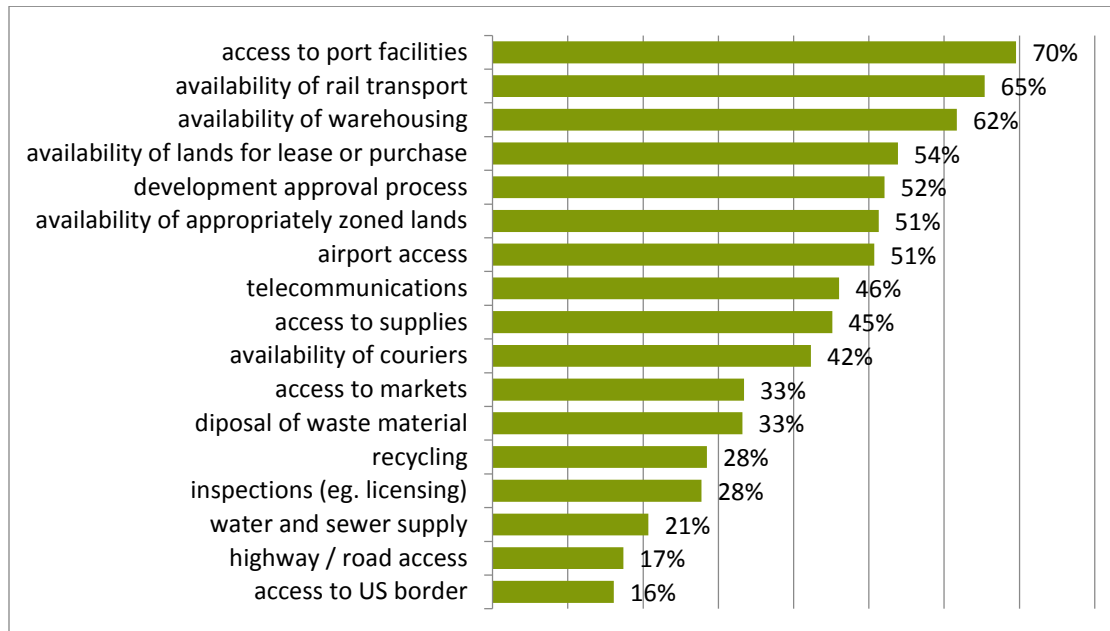


Figure 4. Percentage of Companies Rating Government Services as Poor or Fair

WORKFORCE, BUSINESS SUPPORTS & ECONOMIC DEVELOPMENT CLIMATE

As detailed in Figure 5, over half of the respondents rated the following elements of the business climate as excellent or good: cultural and recreational amenities (68%), K-12 education (66%), Community Futures (62%), Chamber of Commerce (55%), colleges (54%), and workforce quality (54%). Less favourable rankings were provided for technical training (28%), local tax structure (33%), economic development (34%), workforce availability (34%) and housing (39%).

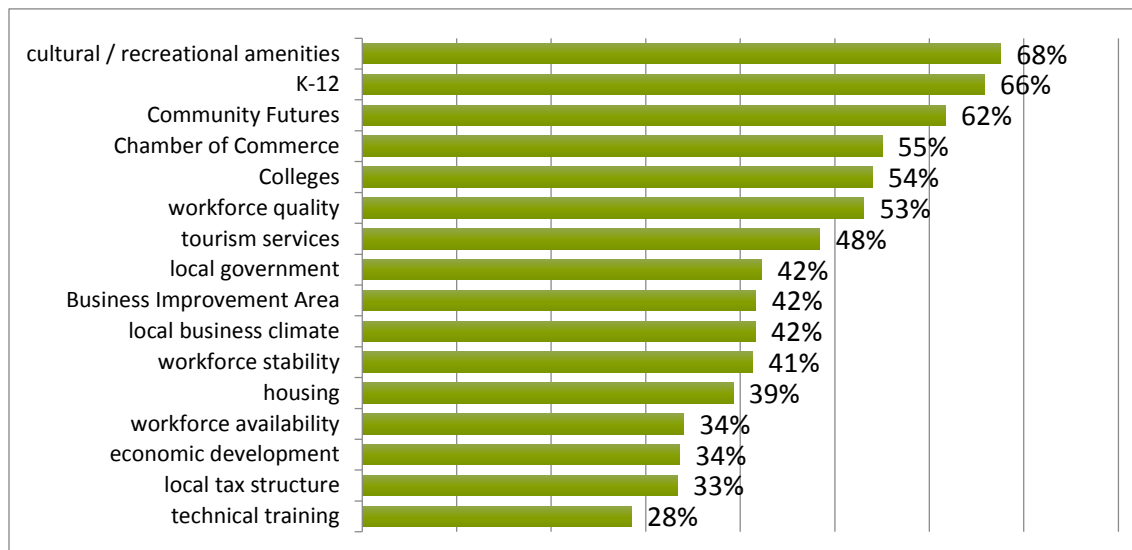


Figure 5. Percentage of Companies Rating Business Climate Elements as Excellent or Good

According to Figure 6, a number of business climate factors were ranked as poor or fair, including technical training (72%), local tax structure (67%), economic development (66%), and workforce availability (66%).

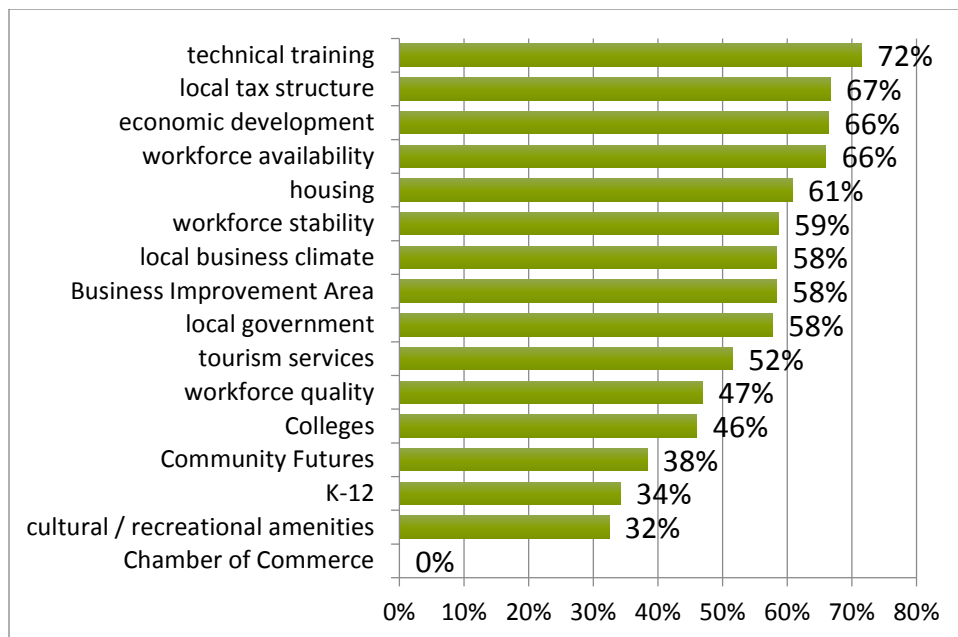


Figure 6. Percentage of Companies Rating Business Climate Factors as Poor or Fair

Findings suggest elements related to workforce development (K-12, Colleges, workforce quality), workforce attraction and retention (cultural and recreation amenities), and business supports (Community Futures, Chambers of Commerce) are key business climate assets. Findings also suggest gaps exist within some aspects of workforce development (technical training), workforce attraction and retention (availability and stability, housing), business supports (Business Improvement Areas, tourism services), and economic development (local tax structure, local business climate, local government).

ECONOMIC DEVELOPMENT CAPACITY

The capacity to support existing business and attract new investment is a key enabler of the regional economy. Figure 6 below outlines the perspectives of regional economic development practitioners (EDPs) with respect to economic development capacity in the region, highlighting areas of strength and limitation. EDPs were asked to rate 13 economic development capacity indicators in the areas of planning and action, governance and leadership, networks and linkages, and engagement using a 5-point Likert scale. The rating average for each indicator is presented below.¹⁷

Capacity in the area of planning and action was high for history of successful economic development activities (4.41), and for the presence of a current economic development plan (3.0). The presence of a shared community vision for the future received a lower rating (2.78). Capacity in the area of engagement was relatively high as it relates to engagement of a diverse group of stakeholders in economic development (3.70), a high level of involvement by stakeholders in economic development (3.30), and the active involvement of the business community in informing economic development (3.30). Capacity related to networks and linkages was high in some areas and low in others. The connection to business supports within the region (3.89) (i.e. Community Futures, Credit Unions, the Business Basin Advisors program, etc.) received a high rating, while lower ratings were reported for connections to external networks (2.88) (i.e. provincial and federal funding and support programs), and history of cross-sectoral collaborations on community projects (2.52). Governance and leadership capacity ratings were relatively high in some areas and low in other areas. The commitment of community leaders to advance economic development priorities (3.48) and the presence of economic development-related human and financial resources (3.13) received high ratings while lower rankings

¹⁷It is important to note that a number of communities were not represented by EDP respondents and it is likely the majority of these unrepresented communities have lower levels of economic development capacity (i.e. didn't have an EDP to send to the regional forum).

were reported on indicators related to elected officials' (1.35) and government staffs' (2.63) understanding of economic development.

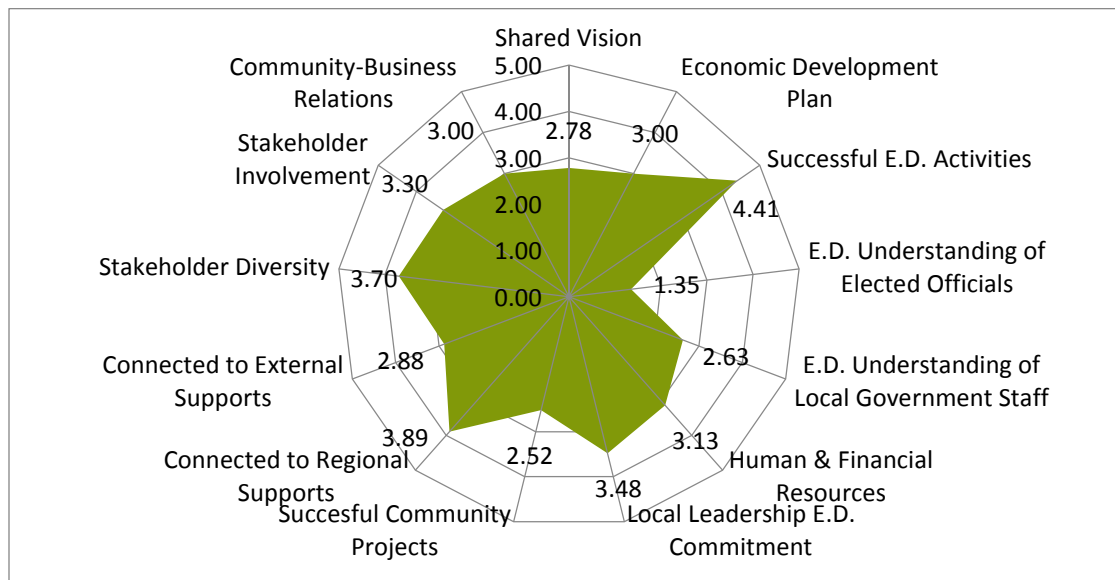


Figure 7. Economic Development Capacity, Perspectives of Regional Economic Development Practitioners

In sum, perspectives of EDPs suggest that the region has a track record of successful economic development projects, communities are connected with in-region business supports, there is a commitment to economic development on behalf of local leadership, and there are diverse stakeholders involved in economic development. Capacity challenges are apparent with respect to knowledge of economic development by elected officials and local government staff, and a lack of history of cross-sectoral collaboration on community projects.

LANDS TO ACCOMMODATE INVESTMENT AND BUSINESS GROWTH

BC Assessment collects data on every privately owned property in British Columbia. This data tracks ownership changes, usage, sale prices, buildings and upgrades (amongst many other types of data). Properties were identified as 'vacant' using the BC Assessment Roll data 'actual use' code as assigned by the BCA appraiser. The strengths of this dataset lie in its comprehensive coverage of the entire province and the regular reporting and updating of the information. This dataset provides the best representation of existing use patterns available. This analysis extracted properties that reported vacant as an actual use code and tied these properties to the parcel fabric made available through the region's governments and the Integrated Cadastral Information Society (ICIS). It is important to note that while this analysis identifies vacant lands, available data did not allow for the identification of vacant lands that are for sale.

This level of analysis also required zoning information to identify parcels purposed for industrial and commercial uses. Significant data gaps compromise findings related to the employment lands inventory in the Elk Valley, Columbia Valley and South East Kootenay Corridors. More specifically, zoning was unavailable for Canal Flats, Elkford, Fernie, Invermere and Kimberley at the time of project reporting. All vacant lands within the municipalities listed above were classified as 'other'. As a result, the supply of employment lands in the above corridors is underrepresented.

Table 3. Vacant Lands Inventory, by Corridor

Corridor	Commercial Parcels	Commercial Area	Industrial Parcels	Industrial Area	Other Parcels	Other Area	Total Parcels	Total Area
Boundary Corridor	76	258.82	46	9,791.25	385	64,549.26	507	74,599.33
Columbia Valley Corridor	58	1,038.10	2	210.48	548	107,844.77	608	109,093.35
Elk Valley Corridor	8	37.37	2	8.10	201	294,668.97	211	294,714.44
Revelstoke Corridor	33	572.11	25	430.28	180	137,505.48	238	138,507.87
Southeast Kootenay Corridor	112	482.35	81	1,771.83	930	228,576.01	1123	230,830.20
Valemount Corridor	33	152.22	8	111.16	43	4,708.50	84	4,971.87
West Kootenay Corridor	216	1,906.48	313	4,447.35	2240	405,387.98	2769	411,741.81
Total	536	4,447.46	477	16,770.44	4527	1,243,240.98	5540	1,264,458.87

Source: BC Assessment Roll Data

As detailed in Table 3, there are 5,540 vacant private parcels of land in the region totalling 1,264,458 hectares. As detailed in Figure 8 below, the highest percentage of vacant parcels (includes commercial, industrial and 'other') is in Valemount (9%), followed by the West Kootenay (8%), Southeast Kootenay (5%), Revelstoke (5%), Columbia Valley (5%), Boundary (5%), and the Elk Valley (3%) Corridors.

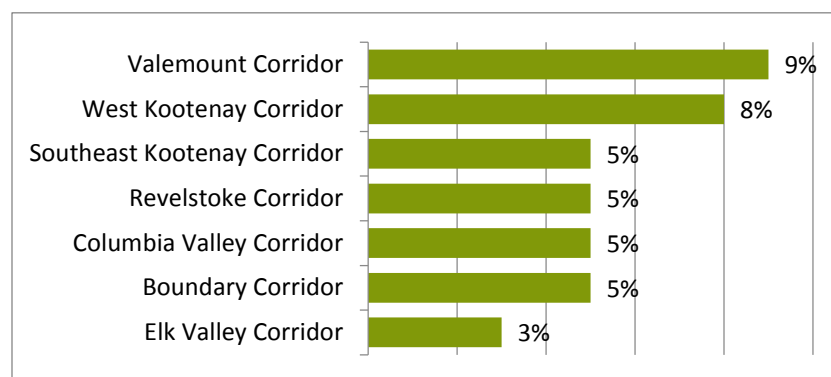


Figure 8. Percentage of Total Vacant Land (Parcels), by Corridor

Also as highlighted in Table 3, the highest number of total vacant parcels is located in the West Kootenay Corridor (2,769 parcels, 411,742 hectares), followed by the Southeast Kootenay Corridor (1123 parcels, 230,830 hectares), the Columbia Valley Corridor (608 parcels, 109,093 hectares), the Boundary Corridor (507 parcels, 74,599 hectares), the Revelstoke Corridor (238 parcels, 166,205 hectares), the Elk Valley Corridor (211 parcels, 294,714 hectares), and the Valemount Corridor (84 parcels, 4,972 hectares). Findings suggest that, as a region, there is an adequate supply of employment lands to accommodate business growth and new investment.

VACANT COMMERCIAL AND INDUSTRIAL LANDS

There are 536 vacant commercial parcels totalling 4,447 hectares. 20% of the Valemount Corridor's commercial land is available (33 parcels, 152 hectares), followed by 8% in the Southeast Kootenay Corridor (112, parcels, 482 hectares), 6% in the West Kootenay Corridor (216 parcels, 1,906 hectares),

5% in the Boundary Corridor (76 parcels, 259 hectares), 4% in the Revelstoke Corridor (33 parcels, 572 hectares), 4% in the Columbia Valley Corridor (58 parcels, 1,038 hectares), and 1% in the Elk Valley Corridor (8 parcels, 37 hectares). Findings suggest there may be limited opportunity for commercial expansion or new investment in the Elk Valley Corridor. Also, while the Southeast Kootenay and Boundary Corridors have a high number of parcels, both have relatively limited vacant commercial areas in comparison to the other corridors.

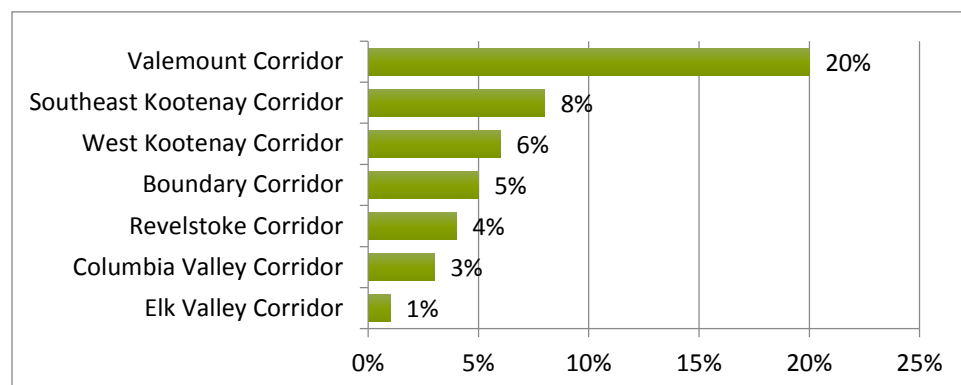


Figure 9. Percentage of Vacant Commercial Land (Parcels), by Corridor

There are 477 vacant industrial parcels totalling 16,770 hectares. 37% of the West Kootenay Corridor's industrial lands are vacant (313 parcels, 4,447 hectares), followed by 26% in the Boundary Corridor (46 parcels, 9,791 hectares), 20% in the Valemount Corridor (8 parcels, 111 hectares), 15% in the Southeast Kootenay Corridor (81 parcels, 1,772 hectares), 14% in the Revelstoke Corridor (25 parcels, 430 hectares), 12% in the Columbia Valley Corridor (2 parcels, 211 hectares), and 2% in the Elk Valley Corridor (2 parcels, 8 hectares). Findings suggest that there may be limited opportunity for industrial expansion or new investment in the Elk Valley Corridor. Again it is cautioned both commercial and industrial lands within the communities of Canal Flats, Elkford, Fernie, Invermere and Kimberley are not currently included in the employment lands inventory due to gaps in zoning data.

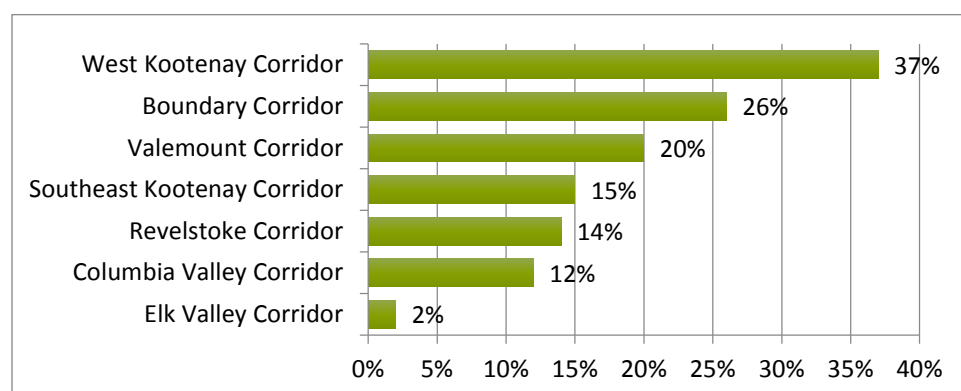


Figure 10. Percentage of Vacant Industrial Land (Parcels), by Corridor

Findings suggest there is an adequate supply of commercial and industrial lands in the majority of the regions' corridors. There are a total of 536 vacant commercial parcels covering 4,447 hectares of land and 477 vacant industrial parcels covering 16,770 hectares of land. However, it should be noted that real estate listings data was not available at the time of report writing and it is therefore unknown how many of these parcels are available for purchase or lease. There appear to be some constraints on the commercial land supply in the Elk Valley with only 8 vacant parcels and 37 hectares of land identified. However, zoning data gaps associated with Fernie and Elkford are likely influencing these results as all parcels from Fernie and Elkford were coded as 'other' lands and therefore were not included in this stream of analysis. There also appear to be some possible limitations to the industrial lands supply in

the Elk Valley (only 2 parcels and 8 hectares of land vacant) and Columbia Valley Corridors (only 2 parcels and 210 hectares of land vacant), although findings at this stage are inconclusive for these corridors due to missing data from Canal Flats, Elkford, Fernie, and Invermere.

OTHER VACANT LANDS

'Other' vacant lands refer to lands zoned as agricultural, mixed use, parks and recreation, residential or rural. As noted above, the 'other' lands inventory also includes commercial and industrial lands within 5 East Kootenay municipalities. There are 4,527 'other' parcels totalling 1,243,241 hectares. The highest number of other parcels is located in the West Kootenay Corridor (2240 parcels, 405,388 hectares), followed by the Southeast Kootenay Corridor (930 parcels, 228,576 hectares), the Columbia Valley Corridor (548 parcels, 107,845 hectares), the Boundary Corridor (385 parcels, 64,549 hectares), the Elk Valley Corridor (201 parcels, 294,699 hectares), the Revelstoke Corridor (180 parcels, 137,505 hectares), and the Valemound Corridor (43 parcels, 4,709 hectares). A detailed analysis of agricultural lands, including related land values, will be undertaken by the RDI in 2015 as part of the Regional Food Systems applied research project.

EMPLOYMENT LANDS WITHIN MUNICIPALITIES

A component of RDI's analysis explores the landscape of vacant commercial and industrial lands within municipalities. As detailed in Table 4 below, 79% of vacant commercial and industrial parcels (805 of 1013) and 27% of vacant commercial and industrial land area (5,655 of 21,218 hectares) is located within municipalities.

Table 4. Vacant Employment Lands within Municipalities, by Corridor

Corridors	Zoning	Vacant Municipal Parcels	Total Vacant Parcels	% Vacant Parcels within Municipality	Vacant Municipal Area (Ha)	Total Vacant Area (Ha)	% Vacant Area within Municipality
Boundary Corridor	Commercial	59	76	78%	57.84	258.82	22%
	Industrial	17	46	37%	58.70	9,791.25	1%
Columbia Valley Corridor	Commercial	34	58	59%	197.46	1,038.10	19%
	Industrial	0	2	0%	0.00	210.48	0%
Elk Valley Corridor	Commercial	8	8	100%	37.37	37.37	100%
	Industrial	2	2	100%	8.10	8.10	100%
Revelstoke Corridor	Commercial	32	33	97%	558.29	572.11	98%
	Industrial	24	25	96%	364.99	430.28	85%
Southeast Kootenay Corridor	Commercial	99	112	88%	251.11	482.35	52%
	Industrial	70	81	86%	477.54	1,771.83	27%
Valemound Corridor	Commercial	33	33	100%	152.22	152.22	100%
	Industrial	0	8	0%	0.00	111.16	0%
West Kootenay Corridor	Commercial	182	216	84%	1,629.08	1,906.48	85%
	Industrial	245	313	78%	1,862.53	4,447.35	42%
Commercial Total		447	536	83%	2,883.37	4,447.46	65%
Industrial Total		358	477	75%	2,771.87	16,770.44	17%
Total		805	1013	79%	5,655.24	21,217.89	27%

83% of vacant commercial parcels (447 of 536 parcels) and 65% of commercial land area (2,883 of 4,447 hectares) lands are located within municipalities. As highlighted in Table 10, all of the available vacant commercial properties in the Valemound (33 of 33 parcels, 152 of 152 hectares) and Elk Valley Corridors (8 of 8 parcels, 37 of 37 hectares) are located within municipal boundaries, followed by 97% in the Revelstoke Corridor (32 of 33 parcels, 558 of 572 hectares), 88% in the Southeast Kootenay Corridor (99 of 112, 251 of 482 hectares), 84% in the West Kootenay Corridor (182 of 216 parcels, 1,629 of 1,906

hectares), 78% in the Boundary Corridor (59 of 76 parcels, 58 of 258 hectares), and 59% in the Columbia Valley Corridor (34 of 58 parcels, 197 of 1,038 hectares).

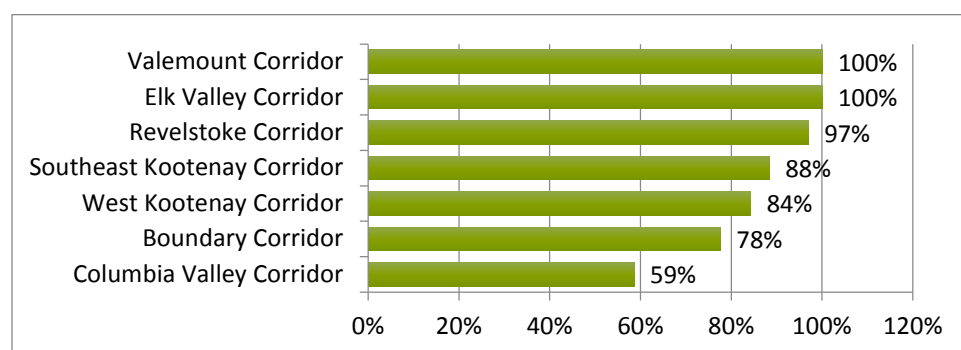


Figure 11. Percentage of Vacant Commercial Land within Municipal Boundaries (Parcels), by Corridor

75% of vacant industrial parcels (358 of 477) and 17% of available industrial land area (2,772 of 16,770 hectares) is located within municipalities. As detailed in Table 11, all of the vacant industrial properties in the Elk Valley Corridor (2 of 2, 8 of 8 hectares) are located in within municipal boundaries, followed by 96% in the Revelstoke Corridor (24 of 25 parcels, 365 of 430 hectares), 86% in the Southeast Kootenay Corridor (70 of 81 parcels, 478 of 1,772 hectares), 78% in the West Kootenay Corridor (245 of 313 parcels, 1,862 of 4,447 hectares), and 37% in the Boundary Corridor (17 of 46 parcels, 59 of 9,791 hectares). There are no vacant industrial lands within municipal boundaries in the Valemount or Columbia Valley Corridors.

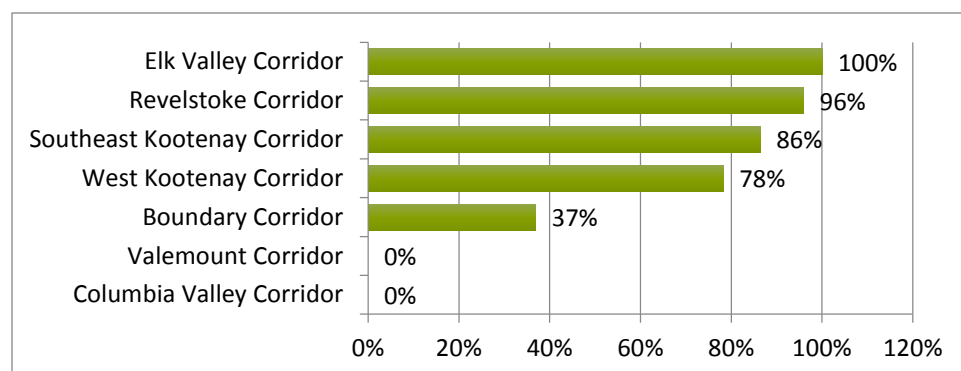


Figure 12. Percentage Vacant Industrial Land within Municipal Boundaries (Parcels), by Corridor

Availability of commercial lands within municipalities is often preferred as the retail trade sector relies on proximity to customers. 83% of vacant commercial parcels (447 of 10,029 parcels) and 65% of commercial land area (2,883 of 4,447 hectares) is located within municipalities. Findings suggest that there may be a limited supply of commercial lands available within municipalities within the Elk Valley Corridor, although it is important to note that zoning data was not available for Fernie or Elkford at the time of report writing, therefore related findings are inconclusive.

High concentrations of industrial lands within municipalities can create challenges as they sometimes conflict with other land use types (i.e. proximity to residential). 75% of vacant industrial parcels (358 of 536) and 17% of available industrial land area (2,772 of 16,770 hectares) are located within municipalities. Findings reveal relatively high concentrations of industrial lands within municipal boundaries in the Revelstoke Corridor (24 of 25 parcels, 365 of 430 hectares), Southeast Kootenay Corridor (70 of 81 parcels, 478 of 1,772 hectares), West Kootenay Corridors (245 of 313 hectares, 1,863 of 4,448 hectares), and Elk Valley Corridor (2 of 2 parcels, 8 of 8 hectares). It is important to note that a number of regional district areas do not have zoning which has an impact on this level of analysis.

CROWN EMPLOYMENT LANDS

Crown lands in the region were also included in RDI's analysis.¹⁸ Using ICIS ownership class data, properties designated as federal crown, provincial crown, and municipal crown were identified.

As outlined in Table 5, there are 758 commercial and industrial parcels, covering 25,943 hectares. 42% of commercial and industrial lands in the inventory are vacant, including 36% of crown commercial lands (162 of 448 parcels) and 51% of crown industrial lands (159 of 310 parcels). In terms of area, 58% of the crown commercial lands (7,151 of 12,253 hectares) and 70% of crown industrial lands (9,631 of 13,690 hectares) are vacant.

Table 5. Vacant Commercial Crown Lands

Zoning	Vacant Crown Commercial & Industrial	Total Crown Commercial & Industrial	% Vacant Commercial & Industrial Crown	Vacant Crown Commercial & Industrial (Ha)	Total Crown Commercial & Industrial (Ha)	% Vacant Commercial & Industrial Crown (Ha)
Commercial	162	448	36%	7,150.69	12,253.16	58%
Industrial	159	310	51%	9,630.50	13,689.68	70%
Total	321	758	42%	16,781.19	25,942.85	65%

An analysis of federal and provincial vacant commercial crown land reveals 100% of parcels are vacant in the Southeast Corridor (7 of 7 parcels, 21 of 21 hectares), followed by 71% in the Boundary Corridor (17 of 24 parcels, 112 of 132 hectares), 67% in the Columbia Valley Corridor (2 of 3 parcels, 0.73 of 1.6 hectares), 60% in the Elk Valley Corridor (3 of 5 parcels, 5,816 of 5,823 hectares), 12% in the West Kootenay Corridor (6 of 49 parcels, 887 of 3,569 hectares), and 10% in the Revelstoke Corridor (3 of 30 parcels, 105 of 500 hectares). There are no provincial or federal crown commercial lands in the Valemout Corridor. (See Figure 13 and Appendix A)

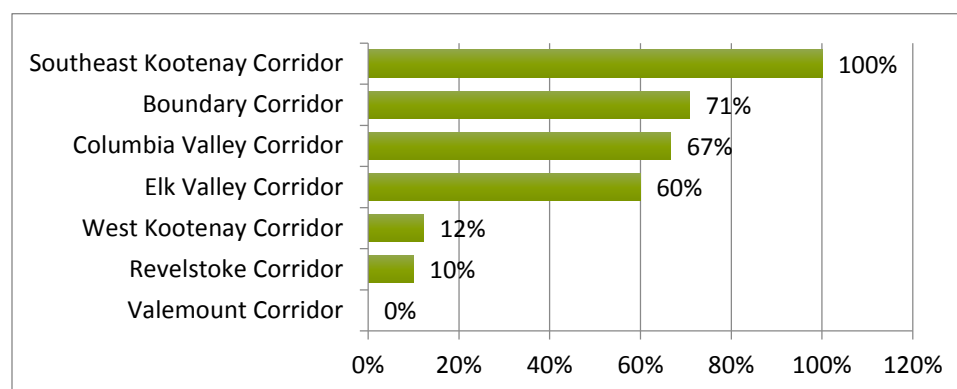


Figure 13. Percentage Vacant Federal and Provincial Commercial Crown Land (Parcels), by Corridor

As shown in Figure 14, 85% of federal and provincial industrial crown parcels are vacant in the West Kootenay Corridor (46 of 54 parcels, 2,939 of 3,552 hectares), followed by 58% in the Boundary Corridor (28 of 48 parcels, 4,097 of 4,865 hectares), 43% in the Southeast Kootenay Corridor (9 of 21 parcels, 841 of 1,176 hectares), 33% in the Elk Valley Corridor (1 of 3 parcels, 62 of 170 hectares), and 18% in the Revelstoke Corridor (2 of 11 parcels, 96 of 251 hectares). There are no provincial or federal crown industrial lands in the Valemout or Columbia Valley Corridors.

¹⁸ Does not include government owned properties classified as 'other'. For example, an analysis of 2008 BC Assessment data (that did include ownership) revealed a number of large properties with an Ottawa address. This could be a future line of inquiry.

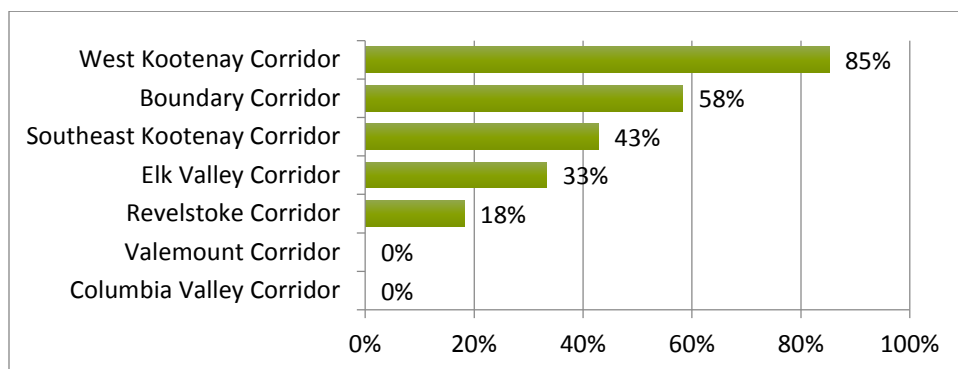


Figure 14. Percentage Vacant Federal and Provincial Industrial Crown Land (Parcels), by Corridor

An exploration of municipal crown commercial lands (Figure 15) reveals 100% of available parcels are vacant in the Valemount Corridor (3 of 3 parcels, 8 of 8 hectares), followed by 61% in the Boundary Corridor (39 of 64 parcels, 60 of 122 hectares), 45% in the Southeast Kootenay Corridor (18 of 40 parcels, 53 of 117 hectares), 37% in the West Kootenay Corridor (54 of 147 parcels, 34 of 1,798 hectares), 17% in the Columbia Valley Corridor (2 of 12 parcels, 1 of 20 hectares), 14% in the Revelstoke Corridor (7 of 50 hectares, 49 of 80 hectares), and 10% in the Elk Valley Corridor (1 of 10 parcels, 4 of 31 hectares).

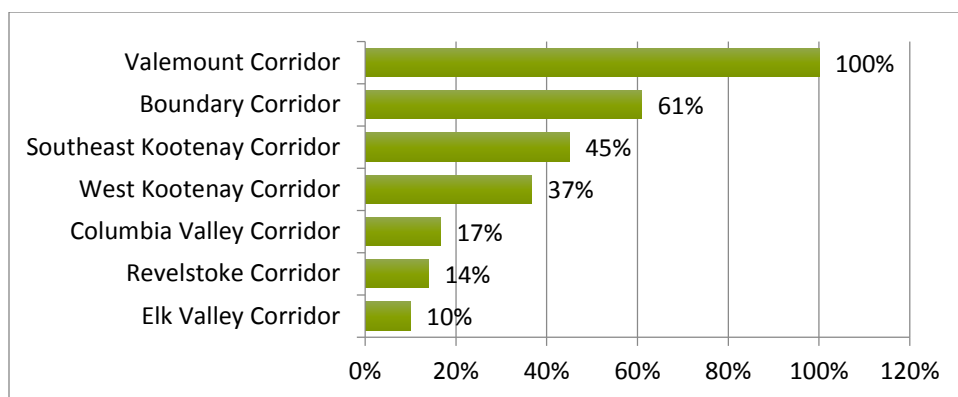


Figure 15. Percentage Vacant Municipal Commercial Crown Land (Parcels), by Corridor

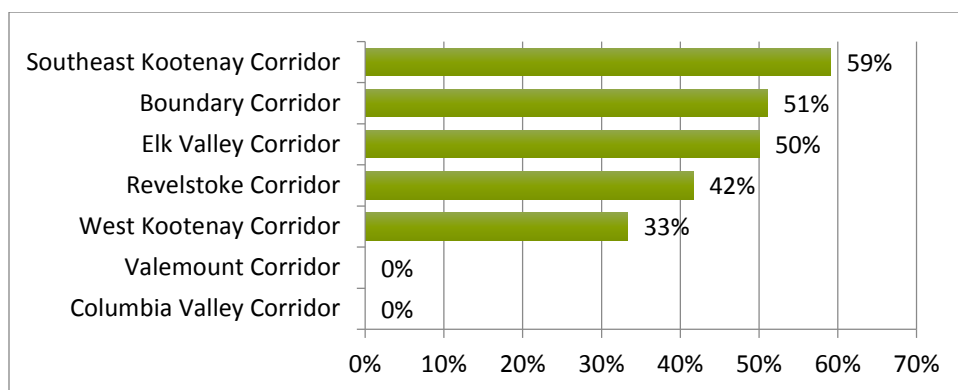


Figure 16. Percentage Vacant Municipal Industrial Crown Land (Parcels), by Corridor

Further, as shown in Figure 16, an exploration of municipal crown industrial lands reveals 59% of available parcels are vacant in the Southeast Kootenay Corridor (13 of 22 parcels, 117 of 182 hectares), 51% in the Boundary Corridor (24 of 47 parcels, 1,323 of 2,198 hectares), 50% in the Elk Valley Corridor (1 of 2 parcels, 21 of 22 hectares), 42% in the Revelstoke Corridor (5 of 12 parcels, 25 of 298 hectares), and 33% in the West Kootenay Corridor (30 of 90 parcels, 111 of 977 hectares). There are no municipal crown industrial lands in the Valemount or Columbia Valley Corridors.

Findings suggest that there is a relatively limited supply of vacant federal and provincial crown commercial lands, with the exception of 17 parcels in the Boundary Corridor covering a land area of 111 hectares. There is also a limited supply of vacant federal and provincial crown industrial lands, with the exception of 46 parcels in the West Kootenay Corridor covering 2,939 hectares and 28 parcels in the Boundary Corridor covering 4,097 hectares. It is important to note that the majority of vacant parcels are provincial crown lands. Findings also suggest there is a relatively limited supply of vacant municipal crown commercial land with the exception of the 54 West Kootenay Corridor parcels covering 34 hectares and 39 commercial parcels in the Boundary Corridor covering 60 hectares. There is also a limited supply of vacant municipal crown industrial lands, with the exception of 30 parcels in the West Kootenay Corridor covering 111 hectares) and 24 parcels in the Boundary Corridor covering 1,232 hectares.

Figures 17, 18 and 19 below present employment land maps for the Southeast Kootenay, Southwest Kootenay and Northern Kootenay areas.

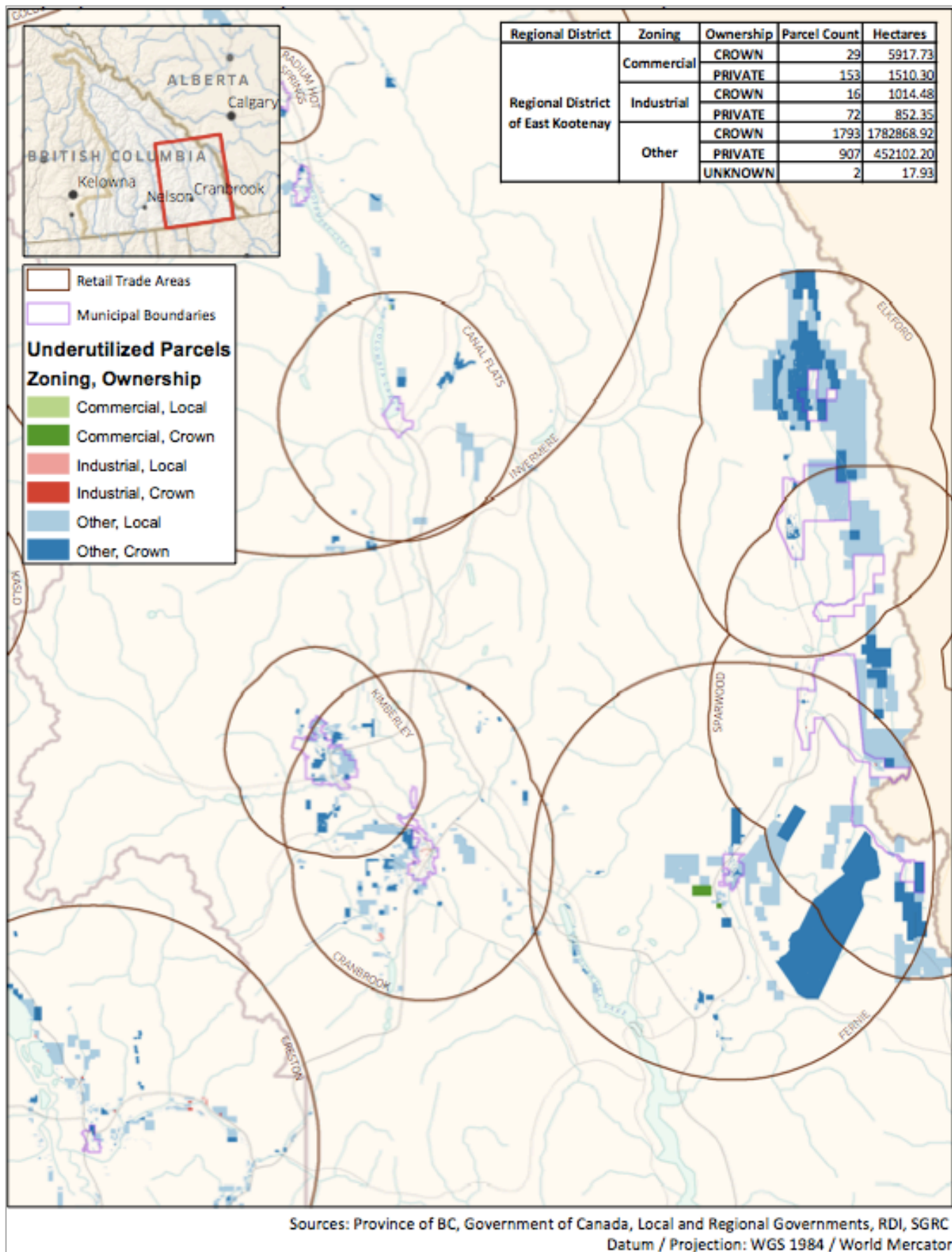


Figure 17. Southeast Basin-Boundary Employment Lands Map

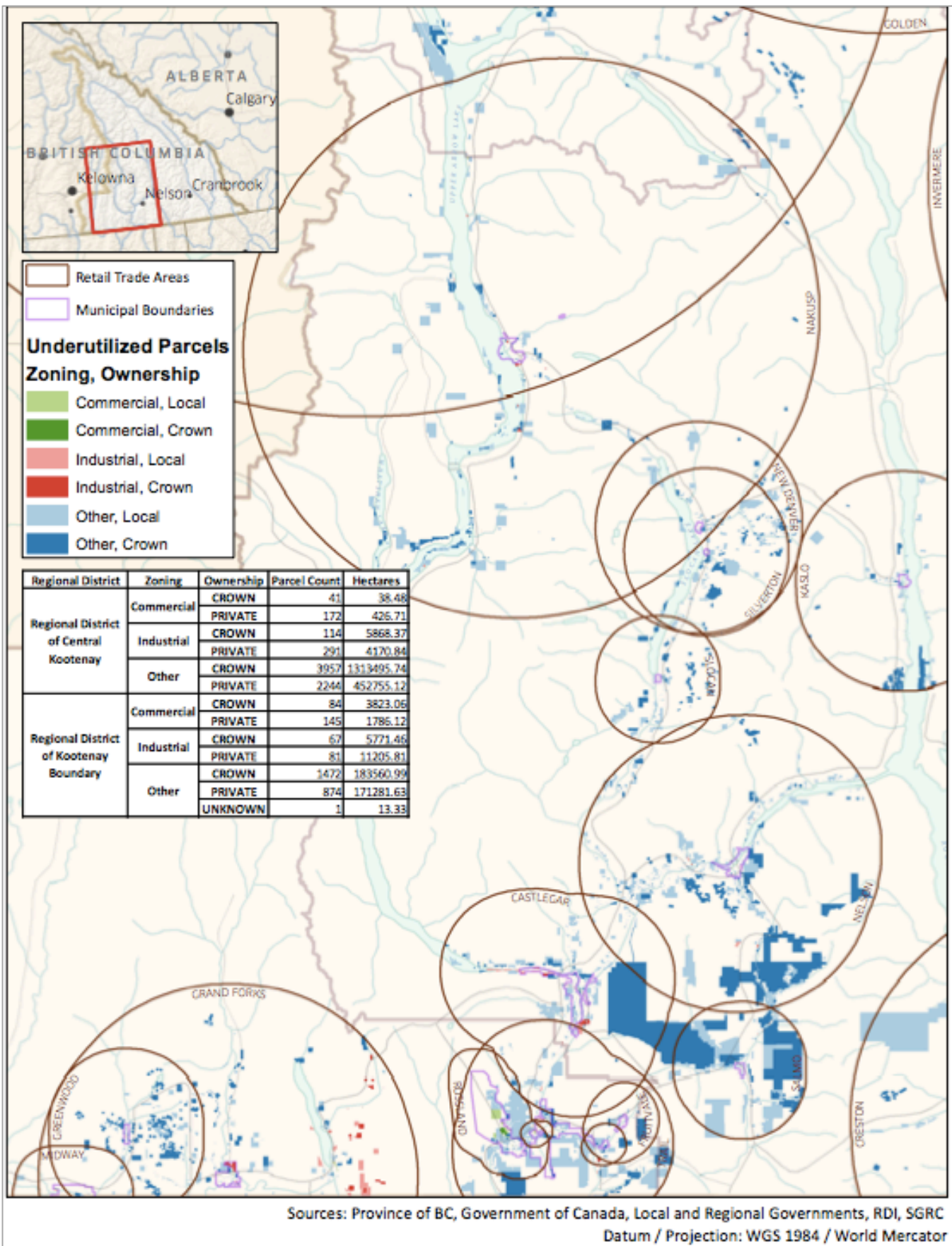


Figure 18. Southwest Basin-Boundary Employment Lands Map

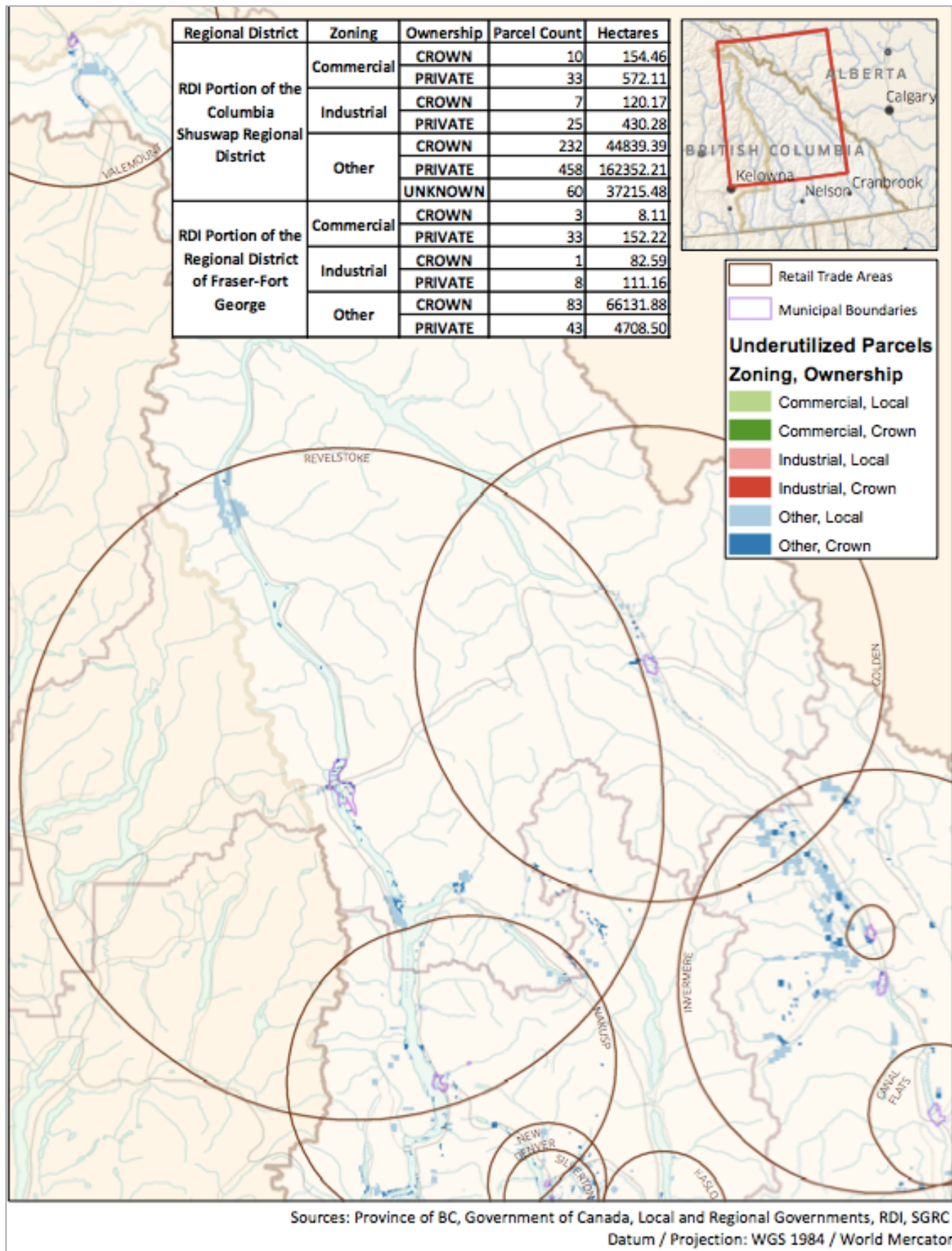


Figure 19. North Basin-Boundary Employment Lands Map

EMPLOYMENT LANDS UTILIZATION

This analysis further explores the regional employment lands inventory to better understand utilization of lands in support of business expansion and new investment. The same data sets and methodology were used to compare the employment lands inventory against total vacant and non-vacant properties. Vacant lands were identified using BC Assessment Roll data that attributed a 'vacant' use code to the property. All other lands not attributed as 'vacant' were classified as non-vacant. This analysis does not determine if the lands in the inventory are being fully utilized for their intended use nor does it include crown employment lands. Again, it is cautioned that both vacant and non-vacant commercial and industrial lands within the communities of Canal Flats, Elkford, Fernie, Invermere and Kimberley are not currently included in the employment lands inventory due to gaps in zoning data.

There is a high level of utilization of the regions' employment lands. 94% of total private parcels (92,648 of 98,188) and 74% of private (commercial, industrial and 'other') land area (3,611,851 of 4,876,309 hectares) are being utilized. See Appendix A for detailed data tables.

Table 6. Utilized Commercial Lands, by Corridor

Corridor	Utilized Commercial (parcels)	Total Vacant Commercial (parcels)	% Utilized Commercial (parcels)	Utilized Commercial (Ha)	Total Vacant Commercial (Ha)	% Utilized Commercial (Ha)
Boundary Corridor	1,315	1,391	95%	8,421.34	8,680.16	97%
Columbia Valley Corridor	1,916	1,974	97%	25,930.55	26,968.65	96%
Elk Valley Corridor	610	618	99%	11,268.68	11,306.05	100%
Revelstoke Corridor	753	786	96%	5,640.69	6,212.80	91%
Southeast Kootenay Corridor	1,324	1,436	92%	11,632.89	12,115.24	96%
Valemount Corridor	136	169	80%	611.39	763.61	80%
West Kootenay Corridor	3,439	3,655	94%	12,930.92	14,837.40	87%
Total	9,493	10,029	95%	76,436.46	80,883.91	95%

As shown in Table 6, 95% of the regions' commercial parcels (9,493 of 10,029) are being utilized, including 66% of the commercial land base (76,436 of 80,884 hectares). The highest utilization of parcels (99%) of commercial land parcels is in the Elk Valley Corridor (610 of 618 parcels, 11,269 of 11,306 hectares) followed by 97% in the Columbia Valley Corridor (1916 of 1974 parcels, 25,931 of 26,969 hectares), 96% in the Revelstoke Corridor (753 of 786 parcels, 5,641 of 6,213 hectares), 95% in the Boundary Corridor (1315 of 1391 parcels, 8,421 of 8,680 hectares), 94% in the West Kootenay Corridor (3439 of 3655 parcels, 12,931 of 14,837 hectares), 92% in the Southeast Kootenay Corridor (1324 of 1436 parcels, 11,633 of 12,115 hectares), and 80% in the Valemount Corridor (136 of 169 parcels, 611 of 764 hectares).

As shown in Table 7, 75% of the regions' industrial parcels (1425 of 1902) are being utilized, including 81% of the industrial land base (72,679 of 89,446 hectares). The highest utilization of parcels (98%) of industrial land parcels is in the Elk Valley Corridor (105 of 107 parcels, 35,603 of 35,611), followed by 88% in the Columbia Valley Corridor (15 of 17, 2,805 of 3,016), 86% in the Revelstoke Corridor (153 of 178 parcels, 2,858 of 3,288), 85% in the Southeast Kootenay Corridor (458 of 539 parcels, 5,808 of 7,580 hectares), 80% in the Valemount Corridor (33 of 41 parcels, 2,113 of 2,224 hectares), 74% in the Boundary Corridor (130 of 176 parcels, 8,876 of 18,668 hectares), and 63% in the West Kootenay Corridor (531 of 844 parcels, 14,611 of 19,059 hectares).

Table 7. Utilized Industrial Lands, by Corridor

Corridor	Utilized Industrial (parcels)	Total Vacant Industrial (parcels)	% Utilized Industrial (parcels)	Utilized Industrial (Ha)	Total Vacant Industrial (Ha)	% Utilized Industrial Area
Boundary Corridor	130	176	74%	8,876.31	18,667.56	48%
Columbia Valley Corridor	15	17	88%	2,805.34	3,015.82	93%
Elk Valley Corridor	105	107	98%	35,603.29	35,611.39	100%
Revelstoke Corridor	153	178	86%	2,858.15	3,288.43	87%
Southeast Kootenay Corridor	458	539	85%	5,808.04	7,579.87	77%
Valemount Corridor	33	41	80%	2,112.92	2,224.08	95%
West Kootenay Corridor	531	844	63%	14,611.33	19,058.68	77%
Total	1425	1902	75%	72675.38	89445.83	81%

Findings suggest there may be some constraints to expansion and new investment of commercial lands in the Columbia Valley Corridor, Columbia Valley and Revelstoke Corridors, and of industrial lands in the Elk Valley Corridor due to high utilization of existing lands. Commercial lands appear to be somewhat underutilized in the Valemount Corridor and industrial lands appear to be somewhat underutilized in the West Kootenay, Boundary, and Valemount Corridors.

POSSIBLE CONSTRAINTS TO EXPANSION AND NEW INVESTMENT

Data generated from surveys and interviews with investors and economic development practitioners (EDPs) were analyzed to better understand possible constraints to employment lands. Aside from the above-identified corridors that may lack supply and the possible investor-parcel matching problem, data suggest additional factors that may constrain the use of available employment lands including conflicting land use ideas¹⁹ and the presence or absence of an Official Community Plan. As highlighted in Table 8 below, land uses creating possible external impacts include: commercial zoned areas, industrial zoned areas, mining tenures, and forestry tenures. Potentially impacted land uses include: residential zoned areas, parks, recreation tenures, community watershed areas, and the Agricultural Land Reserve (ALR). Constraints may occur when these possibly conflicting land use areas bump up against one another.

The utilization of commercial, industrial, mining and forestry designated lands adjacent to 'environmental land assets'²⁰ may be restricted by land use conflicts. Figures 20, 21 and 22 highlight environmental land assets in the southeast, southwest and northern parts of the region, including national and provincial parks, ALR, and community watersheds. These environmental land assets are key considerations as a sustainable development approach to land use planning embeds a consideration of not only strictly economic assets, but also environmental, social, and cultural assets into the planning process. Sustainable development²¹ is about meeting the needs of today without compromising the needs of future generations. It is about improving the standard of living by protecting human health, conserving the environment, using resources efficiently and advancing long-term economic competitiveness. It requires the integration of environmental, economic, social, and cultural priorities into policies and programs and requires action at all levels –by citizens, industry, non-profits and governments.

¹⁹ Advisor noted that conflicting land use ideas was a key factor constraining industrial growth.

²⁰ Represent lands designated for national parks, provincial parks, community watersheds and the agricultural land reserve.

²¹ Government of Canada definition. <http://www.ec.gc.ca/dd-sd/>

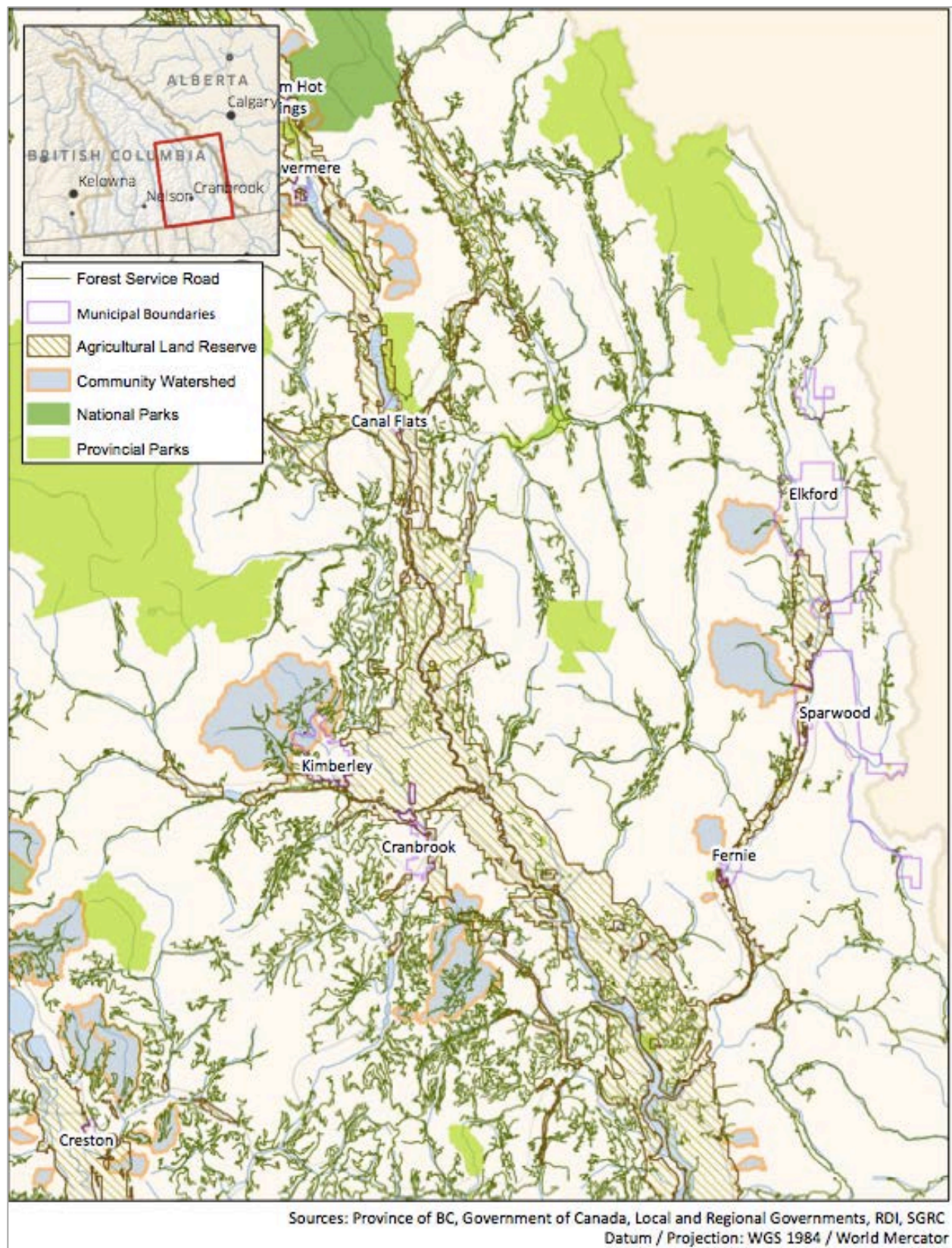


Figure 20. Southeast Basin-Boundary Environmental Land Assets

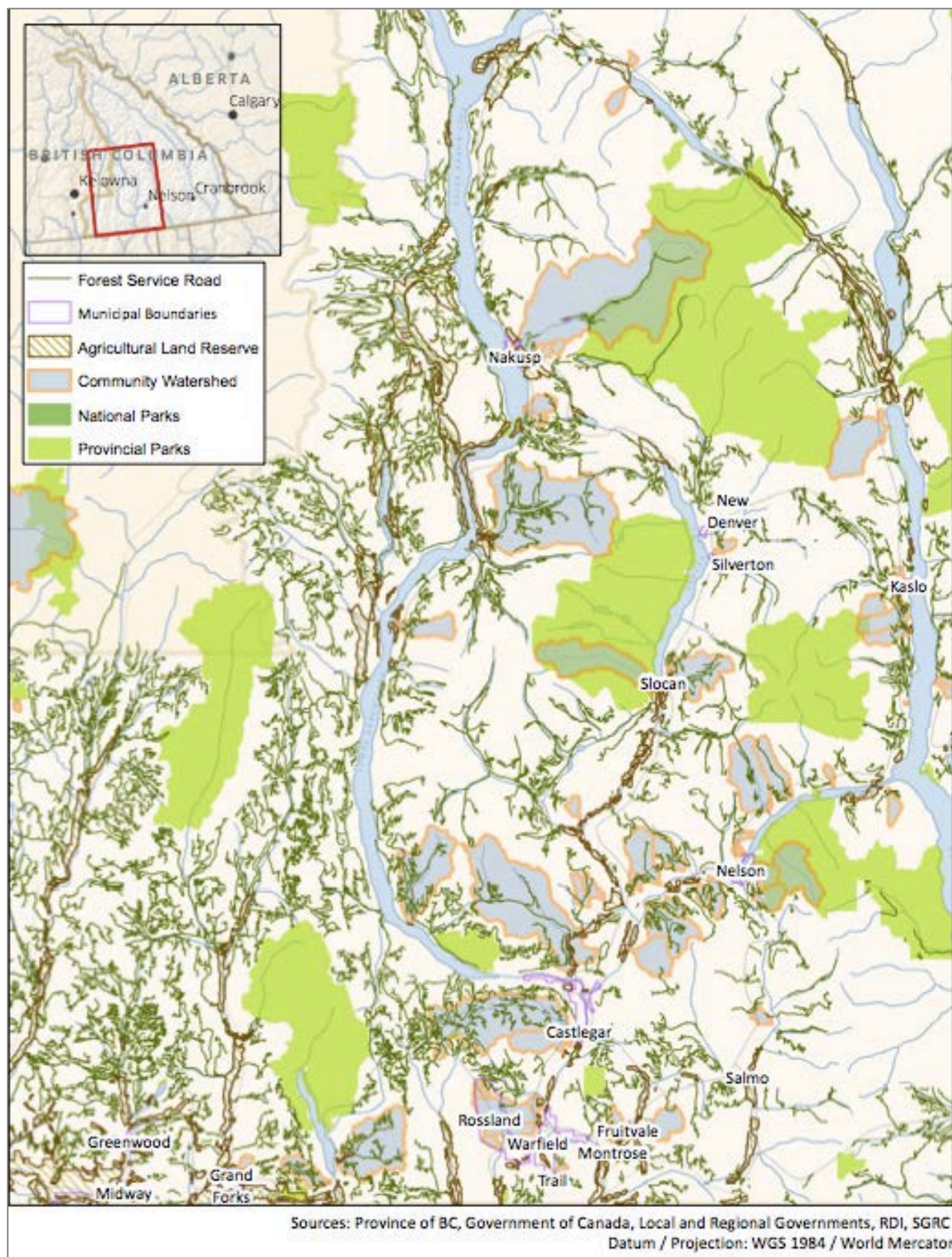


Figure 21. Southwest Basin-Boundary Environmental Land Assets

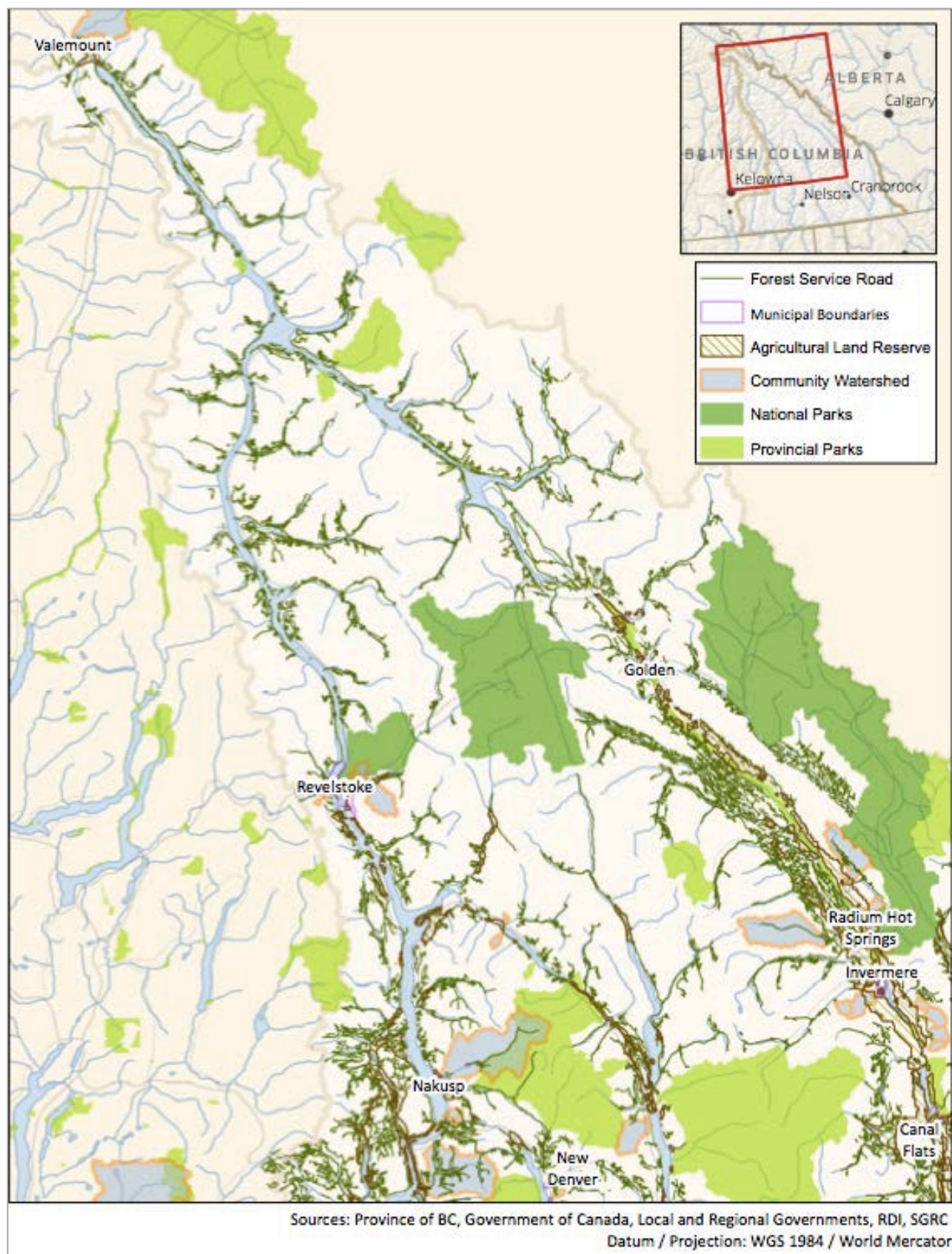


Figure 22. North Basin-Boundary Environmental Land Assets

PERSPECTIVES OF BUSINESSES ON LAND ZONING EXPANSION CONSTRAINTS

Business Retention and Expansion (BRE) research data was also explored to better understand if existing employment lands are sufficient to accommodate investment and business growth. Of the 246 companies reporting expansion plans within the next three years, 64 (26%) reported that a lack of appropriately zoned lands was a barrier to expansion.

Table 10. Expanding Businesses Reporting Lack of Appropriately Zoned Land, by Community / Corridor

Community / Corridor	Total Respondents	Plans to Expand within three Years	Expansion Plans, Constrained by Appropriately Zoned Land	% Constrained
Sparwood	64	27	14	52%
Fernie / Elkford	13	<i>suppressed</i>		
Cranbrook	32	22	6	27%
Kimberley	57	31	8	26%
Creston	12	<i>suppressed</i>		
Columbia Valley	8	<i>suppressed</i>		
Golden	108	54	16	30%
Revelstoke	2	<i>suppressed</i>		
Nakusp	46	17	12	71%
Slocan Valley	80	35	8	23%
Nelson	30	9	2	22%
Castlegar	7	<i>suppressed</i>		
Kaslo	19	<i>suppressed</i>		
Lower Columbia	150	52	8	15%
Boundary	59	26	4	15%
Total	687	246	64	26%

According to the BRE data, Nakusp (71%), Sparwood (52%) and Golden (30%) appear to be experiencing the highest degree of expansion constraint (Table 10). Companies reporting this barrier to expansion from Nakusp were primarily from the retail trade and manufacturing sectors. Sparwood companies were primarily from the construction and other services sector. Companies from Golden were primarily from the accommodation and food services and retail trade sectors.

An analysis of BRE data against the land inventory data suggests that land supply is sufficient in Nakusp, but insufficient in Sparwood and Golden to accommodate expansion and new investment. There are 29 vacant commercial and 30 vacant industrial parcels in the Nakusp Retail Trade Area. It appears as though the land constraints reported in Nakusp may be the result of a matching issue. However, companies in Sparwood are likely constrained, as there are only 9 vacant commercial and 3 vacant industrial parcels available. Inventory data for the Golden Retail Trade Area includes 0 commercial and only 1 industrial vacant parcel. These numbers seem low and should be reviewed and validated by the Town of Golden planning department. Using the corridor level analysis, the Columbia Valley Corridor has 24 commercial and 1 industrial parcel. A comparison of this corridor-level inventory data against the 16 companies reporting appropriately zoned land as a barrier to expansion suggests available lands in Golden are not sufficient to support expansion and/or new investment.

A sectoral analysis was also conducted on the BRE data at a regional level to better understand the types of lands that are limiting expansion and / or new investment (Figure 23). Data suggest the retail trade and manufacturing sectors are experiencing expansion constraints related to a lack of appropriately zoned lands. An analysis of BRE data against Retail Trade Area land inventory data suggests that the challenges retail trade companies are facing may be more of a matching problem than a lack of available

land. There is an ample supply of vacant commercial lands in all communities where retail trade companies reported a barrier to expansion²².

An analysis of BRE data against Retail Trade Area land inventory data also suggests that the challenges manufacturing companies are facing may be more of a matching problem than a lack of available land. (See Appendix B). There is an ample supply of vacant industrial lands in all communities where manufacturing companies reported a barrier to expansion.



Figure 23. Expanding Businesses Reporting Lack of Appropriately Zoned Land, by Sector

²² Note that additional community level data from Golden is required to better understand retail trade constraints specific to that community.
Employment Lands Final Report

RDI TOOLS TO SUPPORT EXPANSION AND NEW INVESTMENT

COMMUNITY EMPLOYMENT LANDS INVENTORIES

An analysis of the employment lands inventory at the Retail Trade Area (RTA) scale allows for an improved local-level understanding of available commercial and industrial lands, which could inform future planning and investment attraction efforts. Municipalities are encouraged to review their Community Employment Lands Inventory to help validate the data and to identify and address any data gaps. The RTA level inventories will be further refined after a period of data validation and data collection to address zoning gaps. Community Employment Lands Inventories for each of the regions' 28 municipalities are available online at www.cbrdi.ca through the *communities* section of the RDI website.

COMMUNITY PROFILES


Updated each spring, the RDI's series of Community Profiles reports on an extensive set of socio-economic statistics for each of the region's municipalities. These profiles provide an overview of conditions related to issues such as demographics, housing, the labour force, and business. The information in these profiles may encourage decision makers to further investigate local trends.

SITE SELECTOR TOOL: MATCHING AVAILABLE LANDS TO INVESTOR NEEDS

In an effort to help businesses and investors connect to available employment lands, a site selector tool was developed as part of the Digital Basin portal. Businesses, investors, realtors, and economic development practitioners can search the online Regional Employment Lands Inventory for parcels that meet complex query criteria, including:

- Location
- Zoning (choose one of 7 major zoning types)
- Developed (has building or land improvements) or undeveloped
- Transportation (distance to major highway, transit)
- Services (distance to power and water)
- Minimum and Maximum Parcel Sizes
- % Grade (minimum % of area of parcel under a certain grade)
 - Slope Classifications 0-3%, 3-10%, 10-20%, >20%

Locating the Tool

The Site Selector Tool is accessed via the Digital Basin, which is located at <http://www.cbrdi.ca/state-of-the-basin/digital-basin-portal>. In the Table of Contents (TOC), open the Cadastral Fabric folder and click the  symbol next to the Parcels layer. This will open the data window.

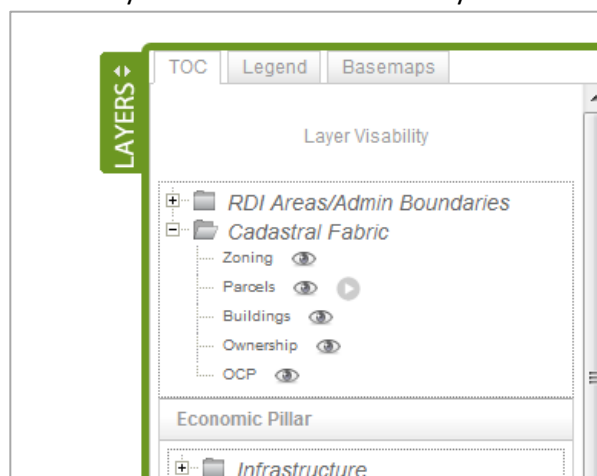


Figure 24. Digital Basin Layers Tab

In the Data window, the Info tab gives a brief description of the tool. Click on the Table tab to access the tool and select your criteria.

Figure 25. Site Selector Tool

Using the Tool

Once the query criteria are selected, click on the Search button. You will see a message that it is executing with a spinner indicating it is running.

Figure 26. Using Site Selector Tool

Accessing Search Results

Once the search is complete, the parcels that meet the criteria are displayed in a table. The parcel dataset that is chosen by the tool is returned. Each dataset has its own format that is dependent on the information that is available for the selected geography.

RD FOLIO	Group No	PID	Zone Class	OCP Class	Area (Ha)	Zoom To
	2100		Confirm		2.83	

Figure 27. Accessing Search Results

Click on the “Zoom To” icon in the table to zoom to the selected parcel. It will show up as a highlighted polygon on the map. At this point you can choose to turn on the Parcel and Zoning layers (or any other layers of interest) while exploring the results on the map.

For technical details or instructions on using the Site Selector Tool, please refer Site Selector Tool User Guide (<http://www.cbrdi.ca/wp-content/uploads/DigitalBasinUserGuide.pdf>) or tutorial video (<http://www.youtube.com/embed/D4rzSZs31do?rel=0>).

CONCLUSION

With the potential exceptions of industrial lands in the Elk Valley Corridor and commercial lands in the Columbia Valley Corridor, analyses suggest that there is an adequate supply of commercial and industrial lands to accommodate new investment and expansion of existing companies. While a number of companies reported a lack of appropriately zoned land as a barrier to expansion, an analysis of the land inventory suggests many of these concerns are the result of a matching problem rather than a lack of appropriately zoned available land. It is important to note that while this analysis identifies vacant lands, available data did not allow for the identification of vacant lands that are for sale.

Economic development assets with respect to government services and the overall business climate include access to suppliers and markets (including proximity to US border and couriers), highway and road infrastructure, inspections and licensing, waste management, workforce development (K-12, Colleges, workforce quality), workforce attraction and retention (cultural and recreation amenities), and business supports (i.e. Community Futures, Chambers of Commerce). Possible gaps exist in the availability of warehousing, key infrastructure assets (access to port facilities, rail transport, airport access, telecommunications, development approval processes), aspects of workforce development (technical training), workforce attraction and retention (availability and stability, housing), business supports (Business Improvement Areas, tourism services), and economic development (local tax structure, local business climate, local government).

According to economic development practitioners, the region has a track record of successful economic development projects, communities are connected with in-region business supports, there is a commitment to economic development on behalf of local leadership, and there are diverse stakeholders involved in economic development. Capacity challenges are apparent with respect to knowledge of economic development by elected officials and lack of history of a cross-sectoral approach on community projects.

Future efforts should focus on promoting the use of the Site Selector Tool to support the identification of suitable lands for business expansion and new investment. Existing businesses, new investors and economic development practitioners are encouraged to utilize the tool. Local governments are encouraged to continue to provide the RDI with annual updates to cadastral data to ensure the tool remains relevant. Planning departments are encouraged to consider the use of a regional cadastral data dictionary, which would allow for a common language across regional districts and municipalities, in turn creating a seamless approach to future updates to the regional parcel fabric. The regional real estate board is encouraged to provide the RDI with MLS data, which would further inform businesses and investors. This data would allow users to search vacant lands that are for sale and to connect with the designated realtor. Finally, the region is encouraged to engage in development planning processes at a regional scale in order to capture landscape level land use opportunities and possible limitations. Future research could address gaps in zoning data for the five municipalities within the Regional District of East Kootenay. In addition real estate and topographic data could be used to further identify lands for sale or lease that are located on a useable slope.

POSSIBLE NEXT STEPS

The Employment Lands project advisory committee should consider the following possible next steps. Resources and organizational leads would be required to undertake possible next steps outlined below.

1. Enhance the Employment Lands Inventory and related analysis
 - a. Validate data with economic development practitioners and local government planners
 - b. Standardize the collection and consolidation of land use data (i.e. consider use of a regional data dictionary across local government planning departments)
 - c. Address data gaps
 - i. Secure zoning data for Canal Flats, Elkford, Fernie, Invermere, and update Kimberley's current dataset
 - ii. Secure MLS data to identify vacant lands available for purchase
 - iii. Incorporate employment lands on reserves in the region
 - d. Consider slope, real estate, property values, agricultural lands, a more in-depth analysis of underutilization and changes in the inventory over time (ownership, vacancy, land values) in future analyses
 - e. Refresh inventory and related regional and Retail Trade Area maps annually
2. Use the Employment Lands Inventory and Site Selector Tool to promote and accommodate business expansion and new investment
 - a. Promote and track the use of the Site Selector Tool
 - b. Encourage the use of Digital Basin data layers in site selection searches to expand the users' consideration of related economic, social, cultural and environmental assets
 - c. Use the Employment Lands analysis to support cross-community investment referrals
 - d. Enhance the Site Selector Tool and add additional Digital Basin data layers based on user feedback
3. Mitigate future possible land use conflicts
 - a. Encourage the use of Digital Basin data layers in site selection searches to expand the users' consideration of possible land use conflicts (proximity to residential areas, watersheds, parks, etc.)
 - b. Further coordinate development planning processes at a regional scale in order to capture potential landscape-level land use conflicts
 - c. Utilize the Employment Lands inventory and Digital Basin asset and indicator data sets in future planning efforts

APPENDIX A. DATA TABLES

Regional Investments Supported by Invest Kootenay

Year	Investors	Opportunities	Inquiries	Investments Realized	Investment Value
2009	79	20	27	5	\$840,000
2010	123	43	90	2	\$310,000
2011	128	86	127	5	\$1,235,000
2012	229	89	117	4	\$95,000
2013	367	101	150	7	\$2,548,000
2014 (to Dec 1)	418	208	207	9	\$1,471,000
Total	1344	547	718	32	\$6,499,000

Source: Invest Kootenay

Government Service Ratings

Government Services	Excellent / Good	Poor / Fair	Total Respondents Providing Rating	No Response	Total Respondents	% Excellent / Good
availability of warehousing	82	473	555	132	687	15%
access to airport facilities	7	16	23	664	687	30%
availability of rail transport	45	85	130	557	687	35%
availability of lands for lease or purchase	167	195	362	325	687	46%
development approval process	149	162	311	376	687	48%
availability of appropriately zoned lands	150	158	308	379	687	49%
airport access	239	246	485	202	687	49%
telecommunications	301	257	558	129	687	54%
access to supplies	299	246	545	142	687	55%
availability of couriers	289	212	501	186	687	58%
access to markets	359	180	539	148	687	67%
disposal of waste material	302	150	452	235	687	67%
recycling	377	150	527	160	687	72%
inspections (eg. licensing)	312	120	432	255	687	72%
water and sewer supply	356	93	449	238	687	79%
highway / road access	490	103	593	94	687	83%
access to US border	52	10	62	625	687	84%

Business Climate Ratings

Business Factors	Excellent / Good	Poor / Fair	Total Respondents Providing Rating	No Response	Total Respondents	% Excellent / Good
technical training	137	344	481	206	687	28%
local tax structure	170	340	510	177	687	33%
economic development	182	360	542	145	687	34%
workforce availability	197	382	579	108	687	34%
housing	226	350	576	111	687	39%
workforce stability	236	335	571	116	687	41%
local business climate	268	376	644	43	687	42%
Business Improvement Area	5	7	12	675	687	42%
local government	232	317	549	138	687	42%
tourism services	31	33	64	623	687	48%
workforce quality	309	273	582	105	687	53%
Colleges	258	220	478	209	687	54%
Community Futures	29	18	47	640	687	62%
K-12	343	178	521	166	687	66%
cultural / recreational amenities	400	192	592	95	687	68%
Chamber of Commerce	30	0	30	632	662	100%

Business Retention and Expansion Sector Representation

Sector	Number	%
Retail Trade	160	23.4%
Professional, scientific and technical services	92	13.5%
Manufacturing	87	12.7%
Accommodation and food services	79	11.5%
Information and cultural industries	46	6.7%
Other services (except public administration)	45	6.6%
Construction	30	4.4%
Arts, entertainment and recreation	30	4.4%
Health care and social assistance	21	3.1%
Agriculture, forestry, fishing and hunting	20	2.9%
Finance and insurance	19	2.8%
Real estate and rental and leasing	19	2.8%
Transportation and warehousing	10	1.5%
Wholesale trade	8	1.2%
Mining, quarrying, and oil and gas extraction	5	0.7%
Administrative and support, waste management and remediation services	5	0.7%
Utilities	3	0.4%
Educational services	3	0.4%
Public administration	2	0.3%
Management of companies and enterprises	0	0.0%
	684	100.0%

EDPs Perceptions of Regional Economic Development Capacity

strongly disagree				strongly agree				Average Rating
BRE Economic Development Capacity Diagnostic	1	2	3	4	5	6	7	
Planning & Action								
Our community has a shared vision for our long-term future. (priorities identified across economic, social, cultural and environmental priorities)	10%	10%	24%	14%	10%	24%	10%	2.78
Our community has a current economic development plan and it is connected to broader planning and related action. (ED priorities aligned with social, cultural and environmental priorities)	10%	29%	10%	5%	14%	19%	14%	3.00
Economic development initiatives have been successful (as measured using pre-defined metrics).	14%	43%	33%	0%	5%	0%	5%	4.41
Governance & Leadership								
Elected officials understand how to participate in efforts aimed at local and regional economic development. (elected officials knowledge)	0%	10%	5%	0%	15%	35%	35%	1.35
Local government staff understands how to participate in efforts aimed at local and regional economic development. (local gvt. staff knowledge)	5%	14%	29%	5%	10%	19%	19%	2.63
Human and financial resources are in place to advance economic development priorities. (resources are in place)	14%	10%	33%	0%	14%	19%	10%	3.13
Our community leaders are committed to actively advancing economic development opportunities, i.e. findings resulting from BRE. (commitment to advancing prioritizes)	0%	19%	48%	10%	14%	10%	0%	3.48
Networks & Linkages								
Economic, social, cultural and environmental groups work together on successful community projects. (healthy relationships / integration of sectors/ priorities)	5%	14%	19%	14%	10%	14%	24%	2.52
Our community is connected to the networks and supports available within our region. (i.e. CF, credit unions, employment service provider, colleges) (connectivity regionally)	24%	14%	38%	0%	10%	10%	5%	3.89
Our community is connected to the networks and supports external to our region (provincial / federal government / industry associations). (connectivity beyond our region)	0%	5%	42%	5%	26%	21%	0%	2.88
Engagement								
A diverse group of stakeholders are involved in economic development planning and action. (diversity of actors involved)	15%	35%	15%	0%	15%	15%	5%	3.70
There is a high level of involvement by stakeholders in economic development. (level of involvement)	10%	14%	38%	5%	14%	5%	14%	3.30
The business community is actively involved in informing economic development. (alignment with business community)	0%	30%	20%	10%	15%	10%	15%	3.00

Vacant Private Lands

Corridor	Vacant Commercial Parcels	Vacant Commercial Area	Vacant Industrial Parcels	Vacant Industrial Area	Vacant Other Parcels	Vacant Other Area	Total Parcels	Total Area
Boundary Corridor	76	258.82	46	9,791.25	385	64,549.26	507	74,599.33
Columbia Valley Corridor	58	1,038.10	2	210.48	548	107,844.77	608	109,093.35
Elk Valley Corridor	8	37.37	2	8.10	201	294,668.97	211	294,714.44
Revelstoke Corridor	33	572.11	25	430.28	180	137,505.48	238	138,507.87
Southeast Kootenay Corridor	112	482.35	81	1,771.83	930	228,576.01	1123	230,830.20
Valemount Corridor	33	152.22	8	111.16	43	4,708.50	84	4,971.87
West Kootenay Corridor	216	1,906.48	313	4,447.35	2240	405,387.98	2769	411,741.81
Total	536	4,447.46	477	16,770.44	4527	1,243,240.98	5540	1,264,458.87

Total Private Lands

Corridor	Vacant Commercial Parcels	Vacant Commercial Area	Vacant Industrial Parcels	Vacant Industrial Area	Vacant Other Parcels	Vacant Other Area	Total Parcels	Total Area
Boundary Corridor	1391	8680.16	176	18667.56	8477	152023.37	10044	179371.09
Columbia Valley Corridor	1974	26968.65	17	3015.82	11115	2407297.09	13106	2437281.56
Elk Valley Corridor	618	11306.05	107	35611.39	7408	543778.99	8133	590696.43
Revelstoke Corridor	786	6212.8	178	3288.43	4211	164407.89	5175	173909.12
Southeast Kootenay Corridor	1436	12115.24	539	7579.87	21936	590831.52	23911	610526.63
Valemount Corridor	169	763.61	41	2224.08	762	15034.06	972	18021.75
West Kootenay Corridor	3655	14837.4	844	19058.68	32348	832606.78	36847	866502.85
Total	10029	80883.91	1902	89445.83	86257	4705979.7	98188	4876309.45

Vacant Private (%)

Corridor	Vacant Commercial Parcels	Vacant Commercial Area	Vacant Industrial Parcels	Vacant Industrial Area	Vacant Other Parcels	Vacant Other Area	Total Parcels	Total Area
Boundary Corridor	5%	3%	26%	52%	5%	42%	5%	42%
Columbia Valley Corridor	3%	4%	12%	7%	5%	4%	5%	4%
Elk Valley Corridor	1%	0%	2%	0%	3%	54%	3%	50%
Revelstoke Corridor	4%	9%	14%	13%	4%	84%	5%	80%
Southeast Kootenay Corridor	8%	4%	15%	23%	4%	39%	5%	38%
Valemount Corridor	20%	20%	20%	5%	6%	31%	9%	28%
West Kootenay Corridor	6%	13%	37%	23%	7%	49%	8%	48%
Total	5%	5%	25%	19%	5%	26%	6%	26%

Municipal and Rural Vacant Private Lands

Corridors	Zoning	Total Parcels	Parcels within a Municipality	% Vacant Parcels within a Municipality	Corridor Area (Ha)	Municipal Area (Ha)	% Vacant Areas within a Municipality
Boundary Corridor	Commercial	131	108	82%	423.61	119.04	28%
	Industrial	109	48	44%	15330.81	1402.92	9%
	Other	1148	170	15%	173910.25	1246.76	1%
Columbia Valley Corridor	Commercial	63	36	57%	1071.73	198.57	19%
	Industrial	2	0	0%	210.48	0	0%
	Other	1075	239	22%	427150.74	2028.52	0%
Elk Valley Corridor	Commercial	12	9	75%	5857.48	41.1	1%
	Industrial	4	4	100%	90.76	90.76	100%
	Other	840	210	25%	1610233.95	79009.05	5%
Revelstoke Corridor	Commercial	43	42	98%	726.57	712.75	98%
	Industrial	32	31	97%	550.45	485.16	88%
	Other	435	170	39%	206375.97	6687.19	3%
Southeast Kootenay Corridor	Commercial	137	123	90%	556.11	320.57	58%
	Industrial	104	84	81%	3537.38	603.59	17%
	Other	1939	293	15%	561471.24	27131.61	5%
Valemount Corridor	Commercial	36	36	100%	160.32	160.32	100%
	Industrial	9	0	0%	193.75	0	0%
	Other	126	14	11%	70840.38	668.29	1%
West Kootenay Corridor	Commercial	281	245	87%	5593.47	5308.94	95%
	Industrial	422	300	71%	9713.88	2525.5	26%
	Other	6564	1002	15%	1621402.13	25325.38	2%
Total		13512	3164	23%	4715401.46	154066.02	3%

Commercial and Industrial Crown Land

Corridors	Crown Ownership	Vacant Commercial	Total Crown Commercial	% Vacant Commercial	Vacant Commercial (Ha)	Total Crown Commercial (Ha)	% Vacant Commercial (Ha)	Vacant Industrial	Total Crown Industrial	% Vacant Industrial	Vacant Industrial (Ha)	Total Crown Industrial (Ha)	% Vacant Industrial (Ha)
Boundary Corridor	Federal	4	4	100%	6.95	6.95	100%	0	0	0%	0.00	0.00	0%
	Provincial	13	20	65%	104.56	125.39	83%	28	48	58%	4,096.77	4,864.58	84%
	Municipal	39	64	61%	59.48	122.16	49%	24	47	51%	1,323.24	2,198.06	60%
Columbia Valley Corridor	Federal	0	1	0%	0.84	0.84	100%	0	0	0%	0.00	0.00	0%
	Provincial	2	2	100%	0.73	0.73	100%	0	0	0%	0.00	0.00	0%
	Municipal	2	12	17%	1.11	19.93	6%	0	0	0%	0.00	0.00	0%
Elk Valley Corridor	Federal	0	2	0%	0.00	6.95	0%	0	0	0%	0.00	0.00	0%
	Provincial	3	3	100%	5,816.39	5,816.39	100%	1	3	33%	62.15	169.46	37%
	Municipal	1	10	10%	3.73	30.62	12%	1	2	50%	20.51	22.02	93%
Revelstoke Corridor	Federal	1	17	6%	0.83	36.62	2%	0	1	0%	0.00	4.14	0%
	Provincial	2	13	15%	104.39	463.67	23%	2	10	20%	95.62	247.12	39%
	Municipal	7	50	14%	49.25	79.67	62%	5	12	42%	24.55	297.76	8%
Southeast Kootenay Corridor	Federal	0	0	0%	0.00	0.00	0%	0	0	0%	0.00	0.00	0%
	Provincial	7	7	100%	20.92	20.92	100%	9	21	43%	840.49	1,176.11	71%
	Municipal	18	40	45%	52.83	116.84	45%	13	22	59%	117.25	181.51	65%
Valemount Corridor	Federal	0	0	0%	0.00	0.00	0%	0	0	0%	0.00	0.00	0%
	Provincial	0	4	0%	0.00	30.00	0%	0	0	0%	0.00	0.00	0%
	Municipal	3	3	100%	8.11	8.11	100%	0	0	0%	0.00	0.00	0%
West Kootenay Corridor	Federal	1	21	5%	875.07	3,525.85	25%	0	1	0%	0.00	16.80	0%
	Provincial	5	28	18%	11.59	43.54	27%	46	53	87%	2,938.57	3,535.37	83%
	Municipal	54	147	37%	33.91	1,797.99	2%	30	90	33%	111.34	976.74	11%
Total		162	448	36%	7,150.69	12,253.16	58%	159	310	51%	9,630.50	13,689.68	70%

Federal and Provincial Crown Commercial Lands

Corridors	Vacant Commercial	Total Commercial	% Vacant Commercial	Vacant Commercial (Ha)	Total Crown Commercial (Ha)	% Vacant Commercial (Ha)
Boundary Corridor	17	24	71%	111.51	132.34	84%
Columbia Valley Corridor	2	3	67%	0.73	1.57	47%
Elk Valley Corridor	3	5	60%	5,816.39	5,823.33	100%
Revelstoke Corridor	3	30	10%	105.21	500.29	21%
Southeast Kootenay Corridor	7	7	100%	20.92	20.92	100%
Valemount Corridor	0	4	0%	0.00	30.00	0%
West Kootenay Corridor	6	49	12%	886.66	3,569.39	25%
Total	38	122	31%	6,941.44	10,077.85	69%

Federal and Provincial Crown Industrial Lands

Corridors	Vacant Commercial	Total Commercial	% Vacant Commercial	Vacant Commercial (Ha)	Total Crown Commercial (Ha)	% Vacant Commercial (Ha)
Boundary Corridor	28	48	58%	4,096.77	4,864.58	84%
Columbia Valley Corridor	0	0	0%	0.00	0.00	0%
Elk Valley Corridor	1	3	33%	62.15	169.46	37%
Revelstoke Corridor	2	11	18%	95.62	251.26	38%
Southeast Kootenay Corridor	9	21	43%	840.49	1,176.11	71%
Valemount Corridor	0	0	0%	0.00	0.00	0%
West Kootenay Corridor	46	54	85%	2,938.57	3,552.17	83%
Total	86	137	63%	8033.601495	10013.58924	80%

Municipal Crown Commercial Lands

Corridors	Vacant Commercial	Total Commercial	% Vacant Commercial	Vacant Commercial (Ha)	Total Crown Commercial (Ha)	% Vacant Commercial (Ha)
Boundary Corridor	39	64	61%	59.48	122.16	49%
Columbia Valley Corridor	2	12	17%	1.11	19.93	6%
Elk Valley Corridor	1	10	10%	3.73	30.62	12%
Revelstoke Corridor	7	50	14%	49.25	79.67	62%
Southeast Kootenay Corridor	18	40	45%	52.83	116.84	45%
Valemount Corridor	3	3	100%	8.11	8.11	100%
West Kootenay Corridor	54	147	37%	33.91	1,797.99	2%
Total	124	326	38%	208.42	2,175.31	10%

Municipal Crown Industrial Lands

Corridors	Vacant Commercial	Total Commercial	% Vacant Commercial	Vacant Commercial (Ha)	Total Crown Commercial (Ha)	% Vacant Commercial (Ha)
Boundary Corridor	24	47	51%	1,323.24	2,198.06	60%
Columbia Valley Corridor	0	0	0%	0.00	0.00	0%
Elk Valley Corridor	1	2	50%	20.51	22.02	93%
Revelstoke Corridor	5	12	42%	24.55	297.76	8%
Southeast Kootenay Corridor	13	22	59%	117.25	181.51	65%
Valemount Corridor	0	0	0%	0.00	0.00	0%
West Kootenay Corridor	30	90	33%	111.34	976.74	11%
Total	73	173	42%	1,596.89	3,676.09	43%

Utilized Lands

Corridor	Commercial	Commercial Area	Industrial	Industrial Area	Other Parcels	Other Area	Total Parcels	Total Area
Boundary Corridor	1315	8,421.34	130	8,876.31	8092	87,474.11	9537	104,771.76
Columbia Valley Corridor	1916	25,930.55	15	2,805.34	10567	2,299,452.32	12498	2,328,188.21
Elk Valley Corridor	610	11,268.68	105	35,603.29	7207	249,110.02	7922	295,981.99
Revelstoke Corridor	753	5,640.69	153	2,858.15	4031	26,902.41	4937	35,401.25
Southeast Kootenay Corridor	1324	11,632.89	458	5,808.04	21006	362,255.51	22788	379,696.43
Valemount Corridor	136	611.39	33	2,112.92	719	10,325.56	888	13,049.88
West Kootenay Corridor	3439	12,930.92	531	14,611.33	30108	427,218.80	34078	454,761.04
Total	9493	76,436.46	1425	72,675.38	81730	3,462,738.73	92648	3,611,850.56

Total Private Lands

Corridor	Vacant Commercial Parcels	Vacant Commercial Area	Vacant Industrial Parcels	Vacant Industrial Area	Vacant Other Parcels	Vacant Other Area	Total Parcels
Boundary Corridor	1391	8,680.16	176	18,667.56	8477	152,023.37	10044
Columbia Valley Corridor	1974	26,968.65	17	3,015.82	11115	2,407,297.09	13106
Elk Valley Corridor	618	11,306.05	107	35,611.39	7408	543,778.99	8133
Revelstoke Corridor	786	6,212.80	178	3,288.43	4211	164,407.89	5175
Southeast Kootenay Corridor	1436	12,115.24	539	7,579.87	21936	590,831.52	23911
Valemount Corridor	169	763.61	41	2,224.08	762	15,034.06	972
West Kootenay Corridor	3655	14,837.40	844	19,058.68	32348	832,606.78	36847
Total	10029	80,883.91	1902	89,445.83	86257	4,705,979.70	98188

Utilized (%)

Corridor	Commercial	Commercial Area	Industrial	Industrial Area	Other Parcels	Other Area	Total Parcels	Total Area
Boundary Corridor	95%	97%	74%	48%	95%	58%	95%	58%
Columbia Valley Corridor	97%	96%	88%	93%	95%	96%	95%	96%
Elk Valley Corridor	99%	100%	98%	100%	97%	46%	97%	50%
Revelstoke Corridor	96%	91%	86%	87%	96%	16%	95%	20%
Southeast Kootenay Corridor	92%	96%	85%	77%	96%	61%	95%	62%
Valemount Corridor	80%	80%	80%	95%	94%	69%	91%	72%
West Kootenay Corridor	94%	87%	63%	77%	93%	51%	92%	52%
Total	95%	95%	75%	81%	95%	74%	94%	74%

Businesses Experiencing Expansion Constraints

Community / Corridor	Total Respondents	Plans to Expand within 3 Years	Expansion Plans, Constrained by Appropriately Zoned Land	% Constrained	Primary Sectors Constrained
Sparwood	64	27	14	52%	construction, other services (i.e. repair & maintenance)
Fernie / Elkford	13	<i>suppressed</i>			
Cranbrook	32	22	6	27%	information & cultural industries
Kimberley	57	31	8	26%	retail trade
Creston	12	<i>suppressed</i>			
Columbia Valley	8	<i>suppressed</i>			
Golden	108	54	16	30%	accommodation & food services, retail trade
Revelstoke	2	<i>suppressed</i>			
Nakusp	46	17	12	71%	retail trade, agriculture
Slocan Valley	80	35	8	23%	retail trade
Nelson	30	9	2	22%	<i>suppressed</i>
Castlegar	7	<i>suppressed</i>			
Kaslo	19	<i>suppressed</i>			
Lower Columbia	150	52	8	15%	retail trade, retail / wholesale trade
Boundary	59	26	4	15%	<i>suppressed</i>
Total	687	246	64	26%	

APPENDIX B. RETAIL TRADE AREA MAPS