

Targeted OCP Review

ECONOMY & EMPLOYMENT LANDS WHITE PAPER

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FOR WORKSHOP DISCUSSION



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for

the District of North Vancouver



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OFFICIAL COMMUNITY PLAN

ECONOMY & EMPLOYMENT LANDS GOAL

Support a diverse and resilient local economy that provides quality employment opportunities.

Source: Our Official Community Plan for a Sustainable Future, 2011



1. INTRODUCTION

As part of the District of North Vancouver’s Targeted Official Community Plan (OCP) Review, White Papers have been developed for:



The purpose of each White Paper is to provide important background information on each topic area. Each White Paper also includes a list of possible actions the District could take to address key issues. District Council will use the White Papers to inform the development of an Action Plan.

A HEALTHY LOCAL ECONOMY IS VITAL TO OUR COMMUNITY

A healthy local economy is fundamental to overall community well-being for many reasons. The most obvious is that it provides jobs that District residents rely upon. Local businesses provide a range of employment opportunities for all ages, levels of education, and skills.

Not only do local businesses provide job opportunities, they also make a significant contribution to the District’s tax base. Business and industry collectively account for approximately 30% of the District’s tax revenue, making them major contributors to the municipality’s prosperity. Local businesses also play a key role as service providers. They provide residents with a wide range of goods and services. District residents have local access to everything from restaurants to automotive repair shops to medical offices.



2. KEY TERMS

Industrial

Per the District's OCP: Areas intended for a range of manufacturing, warehousing, transportation, service and port-related uses. Limited office, limited retail and residential caretaker units may be permitted, so long as they are accessory to the primary industrial use. The OCP also includes a variety of other Industrial land designations, including Light Industrial Artisan, Light Industrial Commercial, and Light Industrial – Innovation District, which allow a mix of commercial, and in some cases residential, uses in addition to ground floor Industrial uses.

Accessory Use

Uses that support or provide a secondary function to the intended land use (e.g., an office addition or retail showroom attached to a manufacturing facility).

Mixed-Use

Land use permissions which allow distinct uses to function in partnership on a development parcel (e.g., residential units above a ground floor commercial or industrial space).

Employment Intensification

Increasing the utilization of existing employment lands via a number of different methods including increased building potential (site coverage, building heights, additional floors, etc.) and increased functionality (increased labour activity, productivity, throughput, technological innovations, etc.).

Trade-Enabling Land Uses

Specific employment land uses that fulfill region serving business activities, such as the movement of goods, large scale manufacturing, and other heavy industrial uses. These uses tend to have specific locational needs (i.e., large sites, access to waterways, rail and highway infrastructure), which only exist in a few specific locations in the region.

3. CONNECTIONS TO OTHER TOPIC AREAS



CLIMATE EMERGENCY

Businesses can make operating decisions to reduce fossil fuel dependence.

Climate change will impact local businesses, particularly those located in areas subject to sea level rise.

Attracting clean tech businesses to the District is a strategic opportunity.



HOUSING

Lack of affordable housing options is cited by the business community as a key barrier to attracting and retaining employees.



Businesses locate in areas where their employees can get to work easily and where they are able to get goods to market efficiently.

Lack of efficient and reliable transportation options (to and within the District) is cited by the business community as a key barrier to attracting and retaining employees.

Businesses are leaving the District because their employees can't get to work.



TRANSPORTATION

4. CURRENT CONDITIONS AND PROGRESS SINCE 2011¹

Key Statistic

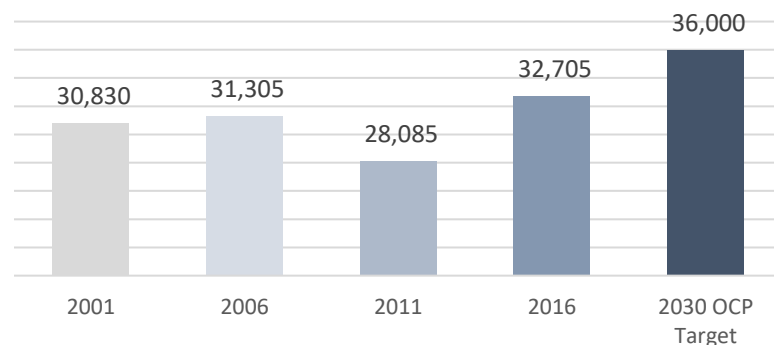
What is Important to Know?

Total jobs in the District was 32,705 in 2016 (Statistics Canada, 2017)²

(OCP targets 36,000 jobs by 2030)

- Total jobs increased by 4,620 between 2011 and 2016.
- Recent (2011 to 2016) job growth in the District (16%) surpassed that in Metro Vancouver (8%), West Vancouver (8%), and the City of North Vancouver (-4%).
- Following a decline in 2011³, job growth improved to align with the trend observed over the 2001 to 2006 period.

Total Jobs in the District



- The District has made good progress towards its goal, but may face setbacks if challenges are not addressed.
- Job totals comprise three components:
 - Those with a regular place of work located in the District: 21,970 (78%).
 - Those that worked from home (in the District): 5,495 (17%).
 - Residents of the District with no fixed place of work⁴: 5,240 (16%).
- The District's job growth targets are not broken down by sector.

¹ These statistics are based on the latest data available. The District has not completed analysis to generate more current statistics.

² All statistics in this section refer to Census 2016 statistics, unless otherwise noted. All changes are for 2011 to 2016.

³ The observed 2011 decline in jobs may be attributed to a number of factors, including the lingering effects of the 2008-09 global recession, as well as potential Census response issues associated with the voluntary nature of the 2011 National Household Survey.

⁴ Jobs with no fixed place of work refers to jobs held by District residents that report to different work sites on any given day, such as contractors, construction workers or film crews. These workers may not necessarily be reporting to job sites located within the District. Data taken from Statistics Canada Census.

Key Statistic

What is Important to Know?

- The economic profile of the District is quite diverse. No one sector accounts for more than 11% of the total workforce. Leading sectors in 2016: Professional, Scientific and Technical Services (3,570 - 10.9%), Retail Trade (3,310 - 10.1%) and Education Services (3,305 - 10.1%).
- Almost all sectors grew over the past Census period.
 - Biggest growth sectors were Accommodation and Food Services (+1,020 jobs), Manufacturing (+790 jobs), Health Care and Social Assistance (+630 jobs), and Transportation and Warehousing (+605 jobs).
 - Only Finance and Insurance (-60 jobs) and Public Administration (-35 jobs) experienced minor losses (less than 1% each).
- A significant portion of the District's workforce (17%) works from home. This segment grew by 670 since 2011 and 31% of this segment is in the Professional, Scientific, and Technical sector.
- Following a Canada-wide period of decline in the Manufacturing sector, the District has shown signs of a significant resurgence in this sector (33% growth between 2011 and 2016), far above Metro Vancouver-wide growth of 5%. The District also experienced stronger-than-regional growth in Wholesale Trade over this same period (33% vs. -8%) and Transportation and Warehousing (61% vs. 13%). Much of this has to do with shipbuilding activities and employment gains specific to Seaspan and port-related business activities.
- Geographic breakdown of employment growth (by type) at a sub-geographic level will provide more insight; however, this will require a custom data run request from Statistics Canada.

Total floor space in employment lands has grown by 104,600 ft² between 2011 and 2016 (1.3% growth) (District of North Vancouver, 2017)

(OCP targets an increase of 33% in built square feet in employment lands by 2030)

- The OCP does not identify floor space targets by type . Ultimately, this would require an employment land capacity analysis examining all employment land use types.
- The District needs to grow by an additional 2.3 million ft² by 2030 (approximately 155,700 ft² *per year*) to achieve the OCP target.
- Industrial growth can be 'lumpy' (i.e., one or two major projects can move the needle significantly).
- According to the most recent inventory, there is only 1 ha of vacant industrial land remaining in the District (Metro Vancouver, 2016),

Key Statistic

What is Important to Know?

meaning most industrial floor space growth will likely need to occur via industrial intensification on existing sites.

- More analysis is required to determine where this additional floor space is likely to be built and whether current land use regulations will permit this level of growth.
- This statistic does not account for redevelopment of older space.

Estimated \$355 million of visitor tourism spending on the North Shore (the District, City of North Vancouver, and West Vancouver) (Larose Research & Strategy, 2019).

- Tourism is a significant contributor to the North Shore economy.
 - While tourism activity does represent a key economic sector, there are related challenges (e.g., traffic congestion, ecosystem damage) that require ongoing tracking and mitigation.
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5. COMMON MISCONCEPTIONS

MISCONCEPTION: The reasons for local business struggles can be boiled down to rising property taxes and/or redevelopment pressures.

FACT: The reasons why a local business might struggle, close, or relocate are varied. District businesses of all sizes face myriad challenges, including difficulties attracting and retaining employees due to housing and transportation issues.

Property tax issues – particularly the taxing of property at that property’s highest and best use and triple net leases (which pass these property tax costs to business tenants) – also present operational difficulties for local businesses.

Many other factors beyond housing, transportation and occupancy costs can contribute to issues. These include retirement/ownership succession, competitive pressures from other industry players or platforms (e.g., ecommerce), and a lack of reinvestment or repositioning to respond to shifting customer preferences.

MISCONCEPTION: Certain employment activities (e.g., super-regional industrial uses such as the Port of Vancouver) create little local (i.e., District / local resident) benefit.

FACT: Port-related activity is estimated to be directly responsible for 4,600 jobs in the District, contributing approximately \$290 million in wages in 2016 (InterVISTAS, 2017).

MISCONCEPTION: Certain broader economic trends (e.g., growth in e-commerce, automation, international trade) can be meaningfully influenced at the local level.

FACT: Most economic trends occur globally, driving demand and changing where and how we work. Trends include changes in the type of space we need for different types of work (Metro Vancouver, 2019). Municipalities do not influence these trends; however, they do control land use regulations, which determine whether new ways of using land for employment uses are permitted.

6. KEY ISSUES

Key Issue	Why is it Critical to Address This Issue?
Employers are struggling to find and keep workers	<ul style="list-style-type: none"> • Businesses are considering relocating outside of the District, or shutting down entirely, due to challenges finding and retaining staff. • Cost and lack of local childcare spaces limit some parents' ability to return to work. • This issue is closely linked to challenges facing the transportation system and the lack of affordable housing options in the District, both of which are noted as primary factors resulting in staff shortages.
Limited opportunities for growth (floorspace and land) is affecting affordability and leading to displacement	<ul style="list-style-type: none"> • Competition for space is driving up rents and land values, putting pressure on existing local businesses (particularly independent businesses) to relocate outside of the District or shut down. • The District is potentially missing out on opportunities to strengthen its economic diversity, and may miss out on opportunities to grow the local non-residential tax base.
Businesses occupying employment areas for which they were not intended or are not compatible	<ul style="list-style-type: none"> • Industrial users note increased competition for space with population-serving commercial uses (i.e., micro-breweries, commercial gyms, daycare facilities) in prime port-adjacent and trade-enabling industrial areas. • These non-industrial uses not only compete for space, but may be creating increased traffic issues, as industrial areas are often not well served by transit or sidewalks. • The prevalence of certain non-retail businesses (gyms, daycares, offices) occupying space on the ground floor of retail main streets is perceived by some to be undermining the general vibrancy of these areas.

7. KEY TRENDS AND EMERGING ISSUES

Key Trend/ Emerging Issue	Why is This Trend/Emerging Issue Important?
Changing demographics (i.e., aging of the District population)	<ul style="list-style-type: none"> • Growing proportion of the local resident population is approaching retirement age, which will impact the size of the local labour force. • If housing options are not available for families and young professionals, the District could experience a serious labour shortage, or rely even more on in-commuting workers – putting additional pressure on the local transportation network. • Aging members of the population still require goods and services – people are required to fill the jobs that serve these needs.
Rising commercial and industrial property assessments	<ul style="list-style-type: none"> • Current property tax assessment methods tie value to the potential value of the site. Consequently, as competition between uses increases (along with potential to mix uses or increase flexibility of use), property tax bills are expected to increase for many existing industrial and commercial properties. • Taxes are often pushed down to tenants, creating a cost factor that may contribute to business challenges and possible relocation – these challenges are most notable for small businesses. • As tracked by BC Assessment, this trend is not unique to the District, but is occurring all across Metro Vancouver and other high growth markets in Canada. • The Province has committed to bringing forth legislation in the spring that will allow municipalities to exempt a portion of the value of sections of commercial properties from taxation for the 2020 tax year (Ministry of Municipal Affairs and Housing, 2020).
Disruptive technologies (e.g., ecommerce, automation)	<ul style="list-style-type: none"> • Emerging technologies could have a significant impact on the types of jobs required by the District, and the types of space that are necessary to accommodate those jobs.



Key Trend/ Emerging Issue

Why is This Trend/Emerging Issue Important?

	<ul style="list-style-type: none">• Changes are often felt most significantly in certain sectors (e.g., automation of production in manufacturing, e-retailing), but may create demand in others (e.g., robot repair and programming, distribution centres).
Growth in global trade is driving demand for local port-related activity and land	<ul style="list-style-type: none">• Increased globalization and changes in supply chains (e.g., ecommerce) are changing how and where we get our goods.• Port of Vancouver has identified significant demand for land to accommodate projected port activities by 2025, with a pressing need for further investment in capacity at port facilities if the region is to meet anticipated demand (Ocean Shipping Consultants, 2016).
Depletion of regional industrial / employment land supply is increasing competition and driving up local rents / values	<ul style="list-style-type: none">• Metro Vancouver is projected to run out of its remaining supply of vacant industrial lands between 2030 and the early 2040s (Metro Vancouver, 2019).• Increased competition for space will result in increased costs for existing uses, and may raise potential for developing multi-storey industrial buildings.
Growth in the sharing economy	<ul style="list-style-type: none">• The sharing economy, where people share goods and services on a peer-to-peer basis, could help the District become more sustainable.

8. RELEVANT BEST PRACTICES

Best Practice	Why is This a Best Practice?
<p>Locate jobs near transit AND encourage development of jobs at sufficient densities to support transit</p> <p>(Note: It may not be possible to densify all types of employment uses as some uses, such as industrial uses, inherently have low employment densities.)</p>	<ul style="list-style-type: none"> • It is easier to attract and retain employees if jobs are located near efficient and reliable transit. • i.e., Can co-locate services to develop attractive economic hubs for various sectors (agglomeration economics). • Town Centres and commercial corridors present leading opportunities for transit supportive densities. • Local routes should seek to serve employment areas and major employers (e.g., Seaspan) where feasible.
<p>Update employment land use regulations to reflect changing nature of work and space needs, while ensuring intended employment activity is protected</p>	<ul style="list-style-type: none"> • Many municipal zoning regulations are decades old, and do not recognize the changing nature of work (e.g., new uses like data centres, vertical warehousing). • Draft Metro Vancouver Industrial Lands Strategy (Metro Vancouver, 2019) recommends that municipalities conduct a zoning review for industrial areas to ensure lands properly protect employment uses, while enabling appropriate uses.
<p>Improve buffering and conflict mitigation standards for industrial uses and encroaching residential uses</p>	<ul style="list-style-type: none"> • As communities intensify, there are more and more instances of sensitive uses (i.e., residential) being developed adjacent to industrial areas, potentially undermining business activities. • Standards for conflict mitigation, including buffering, noise, odor and light minimization, and safety standards help to reduce conflict between these uses. • Standards should put the onus on both expanding industrial uses and encroaching residential/other uses.
<p>Actively monitor and report on local and regional economic trends and development</p>	<ul style="list-style-type: none"> • Economic trends tend to change quickly. • These trends often need to be tracked annually, which is much more frequently than 5-year Census periods permit. • Active tracking of economic indicators and trends in real estate, employment, and land absorption helps enable more proactive policy development at the municipal level.



Best Practice

Why is This a Best Practice?

Integrate economic development with land use planning

- Land is a key economic input.
 - Having a professional on municipal staff with experience related to economic development and land use planning helps align land use planning with economic objectives.
 - This role provides an important linkage between economic development partners (i.e., those tasked with attracting investment to the District), District planning staff, and the business community.
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9. KEY INDICATORS

Key Indicator	Why is This Important to Measure?
Change in distribution of District jobs by NAICS code and geography	<ul style="list-style-type: none"> • Standard metric for tracking employment using Statistics Canada Census Employment and Labour Force Survey data. Differentiates between different employment types (2-digit – general categories, 3-digit – specific categories). • Can use special run data requests from Statistics Canada to assess change in number and types of jobs at sub-municipal level for specific policy areas, including: <ul style="list-style-type: none"> ○ Town Centres ○ Industrial Areas ○ Commercial Corridors ○ Other areas • Enables apples-to-apples comparison to other jurisdictions over similar timeframes. • Effective for many land use types but may not encapsulate all categories (e.g., Film industry and ‘high tech’ related activities can occur in multiple NAICS categories).
Net change in floorspace by type (i.e., Industrial, Office Retail) and geography	<ul style="list-style-type: none"> • Commonly used by municipalities and Metro Vancouver (via inventories and building permits – where available) and major commercial and industrial brokerages (e.g., Colliers, CBRE, JLL) to track change in total supply over time. • Distinguishes between different types of built space relative to general needs of different businesses.
Local employed labour force (% by census place of work)	<ul style="list-style-type: none"> • Tracked as part of Statistics Canada Census every 5 years. • Provides a high-level snapshot of changes over time. • Supplements transportation and commuting data.



Key Indicator

Why is This Important to Measure?

Market health Indicators
(e.g., vacancy, absorption, net rental rates)

- Provides good indication of availability, desirability, and competitiveness of local space compared to other parts of the region and other markets.
- Typically tracked by major commercial brokerages on a quarterly basis by market area (geographies that may not align directly with municipal boundaries – e.g., North Shore for industrial and office tracking by Colliers).

Building permit activity by value range and location

- Provides a general idea about the level of business investment and reinvestment (i.e., renovations, improvements to existing space) in the local market.
- Indicates health of economic activity in cases even when net new floor space is not being developed.
- Typically tracked at a municipal level and reported to CMHC and Statistics Canada for comparison over time and geography (often monthly).

Tax revenue by type of employment use

- Provides a clear indication of contributions businesses make to the municipal tax base and enables assessment of change over time.
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10. ACTIONS TO-DATE

The District has already taken meaningful action on Economy & Employment Lands. The list below is not comprehensive; however, it does highlight key actions the District has taken more recently.

- A stated commitment to protect and enhance employment lands (OCP Policies 3.1 – 3.5).
- Adjusted land-use regulations to encourage new investments and opportunities for jobs and businesses, including new land use designations in the Maplewood area.
- Completed local area planning initiatives (e.g., Maplewood Village Centre Plan, Lynn Creek Town Centre) designed to support more complete, compact communities when rezonings are undertaken in these areas.
- Council Directions for 2019-2022 have identified the economy as a key issue, including a commitment to:
 - Assess the impact of plans and policies on retaining and attracting employment opportunities
 - Increase business friendliness in process and services
 - Advocate with other levels of government for provincial policy tax fairness
 - Retain and grow the full spectrum of businesses within the District
 - Build towards a complete community of jobs and housing

11. POTENTIAL ACTIONS

Category	Action
Plans and Strategies	<ul style="list-style-type: none"> • Prepare an Employment Lands Strategy Study to: <ul style="list-style-type: none"> ○ Review whether current Industrial land use designation and permitted uses under Zoning Bylaw are appropriate to protect current and future trade-enabling industrial and port-related activities in key locations, in line with recommendations of the Regional Industrial Lands Strategy ○ Review whether an update to the Zoning Bylaw is required to ensure non-industrial uses (e.g., gyms and non-accessory retail) are not permitted in core (i.e., trade-enabling) industrial areas, while also permitting appropriate density and heights, where appropriate ○ Review market factors for why non-retail uses (daycares, gyms) are occupying prime frontages on retail main streets to determine what actions are necessary to ensure the vibrancy of these areas (tighter use restrictions, maximum unit sizes, alternative land use locations), including possible changes to the Zoning Bylaw ○ Review guidelines for form and character in Development Permit Areas (Schedule B of the OCP) to ensure buffering requirements are reasonable, while also ensuring that sufficient requirements are placed upon encroaching sensitive uses (i.e., residential) so that these uses do not hinder current operations or future intensification opportunities for neighbouring industrial areas • Conduct a commercial (office, retail, and service commercial) study to: <ul style="list-style-type: none"> ○ Determine if current planned residential densities and development patterns are sufficient to support local-serving commercial uses in the Town Centres and along commercial corridors ○ Review and update land use regulations to encourage/require new multi-family developments to include work-share space in addition to or in lieu of traditional amenities (e.g., commons room, billiards room, theatre) ○ Review and update land use regulations to better support smaller businesses especially along main streets where

Category	Action
	<p>community character and vibrancy is important (e.g., consider restricting size of store fronts)</p> <ul style="list-style-type: none"> ○ Investigate the potential to attract and accommodate innovative population supporting businesses (e.g., local food production,)
Regulations (bylaws and policies)	<ul style="list-style-type: none"> ● See actions under Plans and Strategies
Incentives	<ul style="list-style-type: none"> ● Investigate feasibility of financial and development potential (i.e., density bonuses) incentives designed to encourage preferred forms of development in appropriate locations (e.g., Multi-storey industrial, live work units, etc.) ● Consider incentives, land use policy, or investment on municipally owned land to encourage the development of incubator space for smaller local businesses and District-based start-ups ● Consider asking applicants for Community Grants to show how they contribute to the sharing economy ● Consider incentives to encourage employers to provide childcare.
Advocacy	<ul style="list-style-type: none"> ● Continue to petition, through UBCM, revisions to BC Assessment’s practice of assessing property value on the basis of highest and best use
Convening (i.e., partnerships)	<ul style="list-style-type: none"> ● Provide improved clarity on how local businesses can support community initiatives (i.e., economic promotion, transportation initiatives, environmental initiatives) ● Collaborate directly with the North Shore Economic Partnership to ensure enhanced and up-to-date understanding of local business needs ● Coordinate with Metro Vancouver’s new Regional Economic Prosperity Service to attract preferred forms of investment to the region and to support and share in relevant economic and employment data and research ● Work with developers to identify ways to provide more commercial space and employment opportunities in mixed-use developments ● Coordinate with TransLink to encourage more frequent transit service and routes to employment areas and nodes

Category

Action

- Work with Port of Vancouver, Gateway Council, and Urban Freight Council to identify and secure funding for priority projects related to port-adjacent business activity and safe and efficient goods movement

Internal staffing and process

- Create position for a staff planner responsible for land use planning with an economic development and business facilitation lens
- Conduct an internal review of the development approvals process and business licensing process to determine how the District compares to other Metro Vancouver municipalities and identify if any measures to improve timelines and efficiencies would be appropriate or feasible

NOTE: Please see the White Papers on Transportation and Housing for additional actions that have an impact on Economy & Employment Lands.

DISTRICT RESIDENTS/BUSINESSES CAN HELP BY...

Offering transit passes to employees, providing company shuttles, or offering incentives to carpool.

Improves congestion and reduces GHG emissions from commuters, while encouraging higher transit usage - attracts/retains employees.

Advocating for and providing support to local community events and initiatives.

Encourages support and cooperation between business and community interests. Promotes the District of North Vancouver as a desirable place to live and do business.



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