

LADYSMITH ECONOMIC DEVELOPMENT STRATEGY



Final Report - September 2018

A partnership for a vibrant local economy



Ladysmith Economic Development Strategy

FINAL REPORT - SEPTEMBER 2018

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EXECUTIVE SUMMARY

“This strategy lays the groundwork for how we will move forward together in the coming decade, with a shared vision of creating a vibrant local economy that will be of benefit to all people.”

Ladysmith Economic Development Strategy Steering Committee, September 2018

The Ladysmith area has many advantages for building and sustaining economic opportunity. While traditional industries like forestry and manufacturing continue to have a substantial impact on the local community, new industries and opportunities are emerging that will increasingly position Ladysmith and the surrounding area as an attractive place to live, work and invest.

Ladysmith has **natural assets** like a spectacular waterfront, a central location on Vancouver Island, a natural harbour with plentiful marine resources, and countless outdoor recreational options like mountain biking, hiking and kayaking. It has **built assets** created over many generations, including a historic and attractive downtown, excellent infrastructure, a thriving local airport that builds linkages to the broader world, and a strong sense of community.

These assets can position the town and the surrounding area as a leader in tourism development, while opening the door to new residential, commercial and industry growth.

This study acknowledges the existing collaborative relationship with the Town of Ladysmith and Stz’uminus First Nation, and the vital role which Stz’uminus First Nation will play in activating both the Ladysmith Waterfront Development Plan and future industrial, residential and commercial development in Ladysmith and the surrounding area.

In the course of developing this study, a powerful partnership was forged between project steering committee members, including the Town of Ladysmith, Stz’uminus First Nation, Ladysmith Chamber of Commerce, the Ladysmith Downtown Business Association, Economic Development Cowichan, Nanaimo Airport, and Community Futures Central Island.

The study partners realized that while Ladysmith has challenges to overcome to realize its full potential, new opportunities can be revealed through the analysis of data related to population, employment and industry strengths. This study combines these practical insights with an overview on how community strengths can be leveraged.

Strategies

The Ladysmith Economic Development Strategy is an action-oriented blueprint for the local partners to continue to work together for community benefit. The strategy contains three types of recommendations and supports several initiatives that are already underway:

1. **Immediate Priority Projects** include the Arts and Heritage Hub on the waterfront, developing a walking tour app, creating and enhancing online tools for investment and resident attraction and tourism promotion, and developing a funding-ready plan for mountain bike trail development.

2. **Medium-Term Development Projects** include the waterfront marina expansion and enhanced aquaculture production and seafood processing. Post-secondary facilities, residential development, new events and promotions for Downtown Ladysmith and enhancing Ladysmith's role in tourism, residential growth, and tech, film and industrial development are also seen as medium-term priorities.
3. **Supporting a Strong Local Economy** for the long-term will require an expanded supply of industrial land, enhanced support for local business owners, and the pursuit of new transportation linkages between Stz'uminus, Ladysmith and Nanaimo. Partners should also support the continued presence of traditional industries like forestry and manufacturing and continue to invest in downtown vitality and place-making.

Through these efforts, a shared desire to support business attraction and expansion will be realized and the Town of Ladysmith and the surrounding area will attract a new demographic of investors, entrepreneurs and residents.



Image: Duck Paterson photographer

1. INTRODUCTION

“All of the partner organizations in the Ladysmith Economic Development Strategy share a common interest in building a vibrant community through enhanced employment opportunities, successful local businesses, and a solid base of tax revenue to support community services and amenities.”

1. INTRODUCTION

Economic development in the Ladysmith area benefits from a strong collaborative relationship between the Town of Ladysmith, Stz'uminus First Nation, and other local and regional organizations, including the Ladysmith Chamber of Commerce, Ladysmith Downtown Business Association, Cowichan Valley Regional District (through Economic Development Cowichan), Community Futures Central Island, and the Nanaimo Airport.

These organizations have been meeting regularly and cooperating on joint projects in recent years, including securing funding and overseeing the creation of this Economic Development Strategy.

The strategy's terms of reference are action-oriented and reflect a desire among the community partners to identify specific project opportunities that they should pursue in tandem with funding support options.

1.1 Study Process

The study was prepared by the consulting team of Jamie Vann Struth (Vann Struth Consulting Group Inc.) and Al Baronas (Algis Consulting Ltd.) from February to July 2018.

The project was managed by Amy Melmock and Janae Enns of Economic Development Cowichan, which is the economic development division of the Cowichan Valley Regional District.

Guidance throughout the project was provided by a community steering committee comprised of the following members:

- Mayor Aaron Stone, Town of Ladysmith
- Chief John Elliott, Stz'uminus First Nation
- Mark Drysdale, Executive Director, Ladysmith Chamber of Commerce
- Guillermo Ferrero, Chief Administrative Officer, Town of Ladysmith
- Jolynn Green, Executive Director, Community Futures Central Island
- Mike Hooper, President and Chief Executive Officer, Nanaimo Airport Commission
- Tammy Leslie, President, Ladysmith Chamber of Commerce
- Andrea Rosato-Taylor, President, Ladysmith Downtown Business Association

Key elements of the study process included:

- Four meetings with the community steering committee to review preliminary work, generate ideas and provide feedback.
- Research and economic analysis, including a review of a significant volume of past studies on the Ladysmith economy (including studies developed by Stz'uminus First Nation) and a benchmarking analysis comparing Ladysmith to similar BC communities on a variety of economy-related variables (see Appendix A for details)

- Consultation with business and community stakeholders, including detailed in-person interviews and telephone interviews. A list of consulted individuals can be found in Appendix B.
- Creation and use of an evaluation framework that analyzed a range of project ideas according to determine those that are most worthwhile for the community partners to pursue in the short and medium term.
- Developing a set of additional recommended strategies to support economic opportunities that encourage an overall strengthening of the economic climate in Ladysmith.

1.2 Study Area

The study area is centered on the Town of Ladysmith and includes nearby Stz'uminus First Nation communities and adjacent unincorporated areas.

Ladysmith is also part of an integrated Central Island economy and has employment and business relationships to the south (North Cowichan/Duncan) and north (Nanaimo). Only one-third of employed Ladysmith residents have a regular place of work within the town, meaning that two-thirds are commuting elsewhere or have no fixed place of work (which is common in sectors like construction). On the other hand, more than 600 rural residents from Cowichan Valley Area G (including Saltair), Cowichan Valley Area H (including Diamond and North Oyster/Yellow Point) and Nanaimo Area A (including Cassidy) work in Ladysmith. Wherever employment linkages exist, social, recreational, and commercial linkages tend to follow.

The approximate population of the local study area is shown in Table 1. The table also shows the population of the “sub-regional” area that is within about a 20-minute drive of Ladysmith, as well as the entire Central Island market encompassing the Cowichan Valley and Nanaimo Regional Districts.



FIGURE 1: LADYSMITH'S LOCAL MARKET AREA (BC STATS)

Table 1. Study Area and Market Area Population, 2016

Community	2016 Census Population
Ladysmith	8,537
Stz'uminus First Nation (Chemainus, Oyster Bay Reserves)	812
Diamond	200
Local Study Area	9,549
Chemainus	3,021
Saltair	2,069
North Oyster/Yellow Point	1,320
Cassidy	995
Rest of Cowichan Valley Area H	926
Rest of Cowichan Valley Area G	256
Sub-Regional Market (including Local Study Area)	18,136
Rest of Cowichan Valley Regional District	66,598
Rest of Regional District of Nanaimo	154,703
Total Central Island Market	239,437

Source: Statistics Canada Census

1.3 Value of Economic Development

The Town of Ladysmith, in Council's Strategic Priorities for the current term, identified "Employment and Tax Diversity" as one of its five strategic priorities. Council's vision is:

Promote responsible investment and innovative management of municipal resources to support community prosperity, sustainable economic development, industry diversification and quality employment opportunities in the Ladysmith area.

Stz'uminus First Nation Council has vision statements in six areas, including:

Be able to provide enhanced employment opportunities for our membership.

Economic Development Cowichan recently completed an economic development strategic plan for the entire region that aims to secure a vibrant regional economy through:

- *Increasing high quality employment opportunities*
- *Building a more diversified and sustainable local economy*
- *Supporting existing and emerging businesses that bring new investment to the region*

The other project partners have similar interests. The Ladysmith Chamber of Commerce has a mission "to promote and improve local business." The Ladysmith Downtown Business Association has a vision of "cultivating the heart of the community for a vibrant downtown where businesses work together in support of each other and the community."

The Nanaimo Airport Commission has a vision to “to provide a safe, efficient and financially viable airport, offering excellent services and value to all users while fostering economic development.’ Community Futures Central Island has been working for more than 25 years to help grow the Central Island’s economy.

All of the partner organizations in the Ladysmith Economic Development Strategy share a common interest in building community through enhanced employment opportunities, successful local businesses, and a solid base of tax revenue to support community services and amenities.



2. COMPETITIVE ASSESSMENT

“More than any other factor, the waterfront was identified as the asset Ladysmith should be focused on for future economic development.”

2. COMPETITIVE ASSESSMENT

The competitive assessment of the Ladysmith economy is based on a combination of prior research, consultation with the steering committee and other community members, and a comparative economic analysis. It is intended as a summary of the most common observations and most noteworthy economic facts within the study area.

For purposes of this report, we have determined that these are the trends and characteristics that are most important for guiding economic development initiatives in the Ladysmith area in the next few years.

2.1 Challenges to Overcome

Perception as a bedroom community. The opinion of both local and non-local residents is that if Ladysmith is perceived as primarily a bedroom community for Nanaimo, it will not be viewed as a serious option for business investment or as a shopping, dining or tourist destination.

Perceptions of a declining local employment base. Ladysmith is a net exporter of workers and locally-based employment declined slightly from 2011 to 2016, yet it continues to function as the centre of economic activity in its sub-regional area (roughly from Saltair to Cassidy.)

Emerging labour shortages. This is an increasing challenge for many businesses, especially with entry-level positions in sectors like retail and accommodation services. Local employers have had difficulty recruiting from outside the region for some management and higher-skill positions as a result of lower wages than larger urban centres and a limited supply of housing options.

Limited housing options to support skilled worker attraction. As is noted above, the supply of attainable housing that is accessible to a broad base of professionals and skilled workers is limited.

Limited supply of leasable space. The supply of leasable space for industries like retail and food service is reported to be cyclical in Ladysmith, with current supply being limited.

Limited supply of industrial land. Some industrial space is available in South Ladysmith, in the Rocky Creek Industrial Area, and other select sites adjacent to current industrial and commercial parcels on the waterfront. Overall supply is relatively low, particularly for 1 to 2 acre serviced parcels. An Industrial Land Use Strategy that is being undertaken by Economic Development Cowichan for the entire CVRD region will identify new priorities for future industrial land development.

Some business owners lack the will or business acumen to grow. Like many communities, Ladysmith has many small businesses run by owner-operators. It is natural for some of these individuals to lack expertise in some aspects of running a business, suggesting they could benefit from business mentoring to reach their full potential. Other owner-operators are not inclined to expand their operations due to lifestyle preferences.

Limited range of local tourist activities. While Ladysmith has a variety of local tourist attractions, it is generally not perceived as a destination community where a visitor would plan to spend multiple days. Its current role is more accurately viewed as the northern gateway to the Cowichan region (or the southern gateway to the Nanaimo region).

Perceived highway barrier between waterfront and downtown. The perceived barrier between Ladysmith's waterfront and downtown assets has been a long-standing concern that is being addressed within the Ladysmith Waterfront Development Plan.

Rapidly evolving retail sector increasing competition for downtown merchants. This issue is not unique to Ladysmith and is faced by all retail businesses. The combination of online shopping and online research that precedes in-store purchases has reduced the amount of "window-shopping" and has placed a higher burden on retailers to create reasons to frequent their locations.

Development approval and building inspection process. Various stakeholders identified challenges with the developmental approval and building inspection processes managed by local government. These processes have recently been reviewed by the Town of Ladysmith with the goal of improving service delivery.

Comparatively high property taxes. Several consulted business owners mentioned that property taxes and fees are higher than in other Island communities. There is some acknowledgement that simple comparisons of property taxes do not reflect differences in service levels and that Ladysmith has some special circumstances, such as operating its own Wastewater Treatment Plant.

Lack of public transportation options. There are no public transportation linkages between Ladysmith and Nanaimo or between Ladysmith and the main Stz'uminus community. This limits options for post-secondary students, lower-income individuals and seniors.

2.2 Strengths to Build On

Spectacular waterfront site. More than any other factor, the waterfront was identified during consultation as the asset that Ladysmith should be most focused on for future economic development. It was variously referred to as one of the premier waterfront sites on Vancouver Island and as a relatively unknown and under-appreciated asset. There is significant enthusiasm for capitalizing on the recently-completed Waterfront Development Plan and a sense that after previous plans failed to materialize, that the community can capitalize on current momentum.

Historic and attractive downtown area. The downtown was also frequently mentioned as a key local asset and discussed in terms of its historic character and the specialized local businesses that are attracted to the area. There are many ideas for enhancing the downtown's effectiveness, including through improved services like offsite parking, better signage, and new street furniture, public washroom facilities and design elements to enhance vitality.

Strong sense of community. Nearly every individual consulted for the study mentioned Ladysmith's strong community character and small-town feel that is increasingly rare in other communities. Preserving this character is a prime concern for many.

Established pattern of population growth locally and regionally. Ladysmith and the broader Central Island and Vancouver Island regions have a longstanding pattern of consistent population growth. While growth creates some challenges, the underlying desirability of the region is a tremendous benefit compared to rural regions in other parts of Canada that are consistently losing population, local tax base, and services.

Central location between the population clusters of the Nanaimo and Cowichan Valley Regional Districts, which have a combined population of nearly a quarter million people. Ladysmith is also within a 90-minute drive of more than 700,000 people from Greater Victoria to the Comox Valley, meaning the community is an excellent location for distribution and service businesses with customers throughout Vancouver Island.

Proximity to the Nanaimo Airport and Duke Point ferry, container and barge terminals. These are significant human and goods transportation facilities for Vancouver Island and further enhance Ladysmith's value as a central distribution and service location for the Central Island region.

Housing. Access to affordable housing is a challenge in many communities, including Ladysmith, but housing prices are lower in Ladysmith than in many comparable lower mainland communities. New residential developments are aggressively being pursued in Ladysmith.

More affordable developable land than Nanaimo. While Ladysmith does not have a large supply of available developable land for industry and business, land costs are generally more affordable than in Nanaimo.

Good working relationship between Town of Ladysmith and Stz'uminus First Nation. The two communities are working together on a variety of projects, including waterfront development. The desire to find mutually beneficial projects will enhance the future wellbeing of both communities.

2.3 Projects and Opportunities

The project and opportunities listed below were discussed through consultation and with the steering committee as either (i) community projects that the project partners could pursue with funding support, or (ii) more general economic development opportunities that are not currently suitable for funding support but could be pursued through other local or regional initiatives. They are listed in alphabetical order.

- 1. Aquaculture development.** Refers to expanded aquaculture production, not including related seafood processing. This includes a new focus on geoduck production and is an opportunity being pursued by Stz'uminus First Nation that would have broader economic benefits to Ladysmith and surrounding areas.
- 2. Arts and Heritage Hub development.** The Arts and Heritage Hub is a key feature of the Waterfront Plan and is centered on the "Machine Shop" building that currently houses the Ladysmith Art Gallery, Heritage Centre, artist studios and administrative offices for several local organizations.

A total of \$1.8 million in federal gas tax funding was recently secured for structural and related repairs and upgrades to the facility and subsequent funding is being pursued to develop the programming elements of the Hub. This will enhance its role as a waterfront tourist attraction and further support the arts and various creative endeavors through expanded gallery and studio space, as well as showcasing Stz'uminus First Nation heritage and the industrial history of the waterfront.

- 3. Downtown enhancement.** Refers to additional funding for the type of downtown enhancement activities already initiated by the Town that aim to create active street life (places to sit, games on the street, distinctive art or structural elements) rather than general “beautification” elements that are more passive and often more expensive to maintain.
- 4. Downtown shopping promotion.** Refers to concerted marketing and promotion of Ladysmith’s historic downtown as a regional shopping destination, including a focus on boutique shopping opportunities through some of the more specialized retailers. One promotional idea is to organize or to entice existing companies that offer shopping bus tours. Ladysmith successfully hosted a previous tour, allowing it to showcase its historic downtown and specialist retailers. The tours could be day-trips from Victoria, from the Lower Mainland via the Duke Point or Departure Bay ferries, or linked to cruise ship visits in Nanaimo or Port Alberni.
- 5. Festival expansion and promotion.** Refers to the potential to secure funding support for festival development, which could include expanded programming, improved infrastructure, or simply increased external marketing. The goal is to have another festival on the yearly calendar that drives tourist visits to Ladysmith.
- 6. Highway commercial.** Refers to further expansion of the type of auto-oriented development found at SFN’s Oyster Bay development and is contemplated for parts of the Nanaimo Airport lands (but not in any significant way within municipal boundaries). This opportunity builds on the significant through-traffic on the Island Highway that would not otherwise stop in the Ladysmith area at all.
- 7. Industrial business development.** Refers to a wide range of possible business types, including light industrial, service commercial and distribution that share a common need for industrial space, typically in proximity to the highway (or the waterfront) and may be oriented toward serving the broader Central Island region. The potential for a manufacturing operation, perhaps associated with processing of regional agricultural products or a new wood manufacturing operation, will remain a possibility so long as the region has primary resource industries like logging, farming, fishing, and mining.

- 8. Marina expansion and fuel dock development.** Refers to the expansion and reconfiguration of Ladysmith Community Marina moorage space that is shown in the Waterfront Plan, ideally to be accompanied by a marine fuel facility, which will increase transient marine traffic and tourism.
- 9. Marine-related services or light manufacturing.** Refers to a subset of the broader range of light industrial companies that might consider Ladysmith as a Central Island hub, with a particular focus on those that are marine-related and require proximity to the waterfront. Examples include marine-related manufacturing (e.g., small boat building) and marine support services like repair and maintenance.
- 10. Mountain bike trail development.** Refers to funding for additional trail development and other product development within the Town, including surveying and mapping trails, creating signage, and promoting mountain biking in Ladysmith as part of a growing network of Island-based mountain biking destinations. This will build on the work already done by the non-profit Ladysmith Trail Alliance.
- 11. Multi-modal transportation facility.** Refers to the development of a facility with excellent transportation connections (highway, water, air) to transfer freight from one mode to another, often involving repackaging and sorting for delivery.
- 12. New Visitor Centre.** Refers to the development of a new highway-oriented Visitor Centre, as identified in the Waterfront Plan as a medium-term (3-5 year) priority. The proposed location is the northeast corner of the Island Highway and Roberts Street and other locations within this vicinity may hold potential.
- 13. Post-secondary institution.** Refers to the attraction of a post-secondary facility or research institute.
- 14. Regional trail development.** Refers to Ladysmith supporting the completion and/or enhancement of regional-scale trails as a tourist attraction both locally and regionally. Ideas include completion of the Trans-Canada Trail (rather than having the current trail use the road shoulder), as well as developing a bike tourism trail using the right-of-way of the Esquimalt & Nanaimo (E&N) Railway.
- 15. Residential attraction (prime-age demographic).** Refers to a specific initiative focused on attracting new residents with desirable demographic characteristics, including working-age adults and those with entrepreneurial talents or desired professional or technical skills.
- 16. Residential development.** Refers to both single-family and multi-family housing developments that would increase Ladysmith's population and resident labour force, and ideally would also address current deficiencies in housing stock for professionals and skilled workers seeking to relocate to the area.

- 17. Seafood plant.** Refers to a facility for processing seafood product caught or harvested by Stz'uminus First Nations, including from geoduck aquaculture.
- 18. Seniors housing development.** Refers to the need for seniors housing to allow older residents to stay in the community if they reach a point where remaining in their own home is not possible. Stz'uminus First Nation is currently finalizing a seniors housing project that will serve the entire community and make a valuable contribution to the local seniors housing market in the near term. Given the aging of the population, additional seniors housing or senior-friendly housing will be required.
- 19. Technology sector attraction.** Refers to the attraction of companies or individuals working within a variety of technology-based industries, such as software, new media, environmental technology, alternative energy, aerospace, advanced manufacturing, film, and others.
- 20. Tourism marketing (general).** Refers to general tourism marketing for the community and its events and attractions, including the development of new and improved marketing tools like a new tourism promotion website, creation of a web marketing strategy, etc.
- 21. Tourism signage (wayfinding).** Refers to the desire among some of those interviewed that Ladysmith needs more and better wayfinding signage of several types – leading visitors from the highway into downtown or to the waterfront, directing visitors between the waterfront and downtown, and leading visitors to key amenities like off-street parking, public washrooms, and walking trails.
- 22. Walking tour app development.** Refers to the creation of an app to guide visitors through one or more walking tours in the community, including downtown heritage tours, food tours, and so on.

2.4 Community Branding Attributes

When considering the Ladysmith attributes that should be highlighted in community branding for economic development, it is useful to think about the intended target.

Attracting new businesses to smaller communities usually means attracting new people as well, including small-business owners as well as managers and skilled personnel who would support the establishment or growth of a larger business.

The ideal demographic target might be young adults, including those with children, with entrepreneurial ambitions or valuable skills.

This demographic has adults to contribute to local business growth and expansion, a household in its “high-spending” years that would contribute to the local retail and services market for existing businesses, and children who would sustain the student count in local schools and help sustain the demand for community-based recreational, cultural and educational programs.

With this target demographic in mind, the Ladysmith attributes that are most important to highlight from a community branding perspective include the following:

- The **historic character** of the downtown area. There is emerging cultural value placed on “authenticity” and Ladysmith has a tremendous asset with its classic small town main street. Entrepreneurs also want unique spaces that can be created or adapted to reflect the historic character of the downtown.
- The **connection to nature**, including through recreational opportunities in nature (hiking, mountain biking, kayaking, scuba diving), as well as a strong environmental ethic.
- The strong **sense of community**. This returns to the notion of authenticity and how people in Ladysmith talk about their community’s character and their relationships with their neighbours, as well as community institutions, recreational and cultural programs, festivals, and so on.
- Affordable and desirable **housing options**. Younger adults and families from larger urban centre are seeking out communities that can provide more affordable locations.
- Central and accessible location. This is important both as a selling feature for businesses, who will have opportunities to service a Central Island market, as well as being located in close proximity to larger centres and with easy access to transportation linkages to Vancouver and beyond for business or personal reasons.

Building the Brand

The Ladysmith brand relates to what people think of when they hear the name “Ladysmith.” Marketing and promotions (what people are told about Ladysmith) is less powerful in establishing the community brand than people’s actual experience of the community.

To reach the desired demographic will involve a blend of traditional economic development and business-related measures, as well as supporting quality of life-related initiatives that build upon the desirable sense of place that already exists. Within the business-related realm, it should be as easy as possible to start a business, with supportive services in place for business advice, a welcoming and supporting business community, and a local market that is open to entrepreneurs who are trying out new ideas.

The Ladysmith brand also depends on the sense of place and the quality of life for residents, especially the entrepreneurial and skilled mid-career adults with families that are the most desired demographic.

By supporting recreational and cultural amenities like mountain biking and public art, ensuring a good supply of quality and affordable housing is built, encouraging entertainment and dining options like craft breweries or a waterfront restaurant and emphasizing local interest in “green” products and lifestyles, new business and resident attraction messages will be underscored.

As Ladysmith becomes more and more a community of choice for families and prime-age adults, the message will spread organically through word-of-mouth and social media. A positive feedback loop occurs as more entrepreneurs and skilled workers and families are attracted to the community, helping to bring about even more positive change.

Communicating the Brand through Partnered Business Attraction, Retention and Expansion

The various members of the Project Steering Committee each have a role to play in promoting the Ladysmith brand and encouraging new business development. In particular, the Ladysmith Chamber of Commerce is often a first point of contact for prospective new businesses and residents through their operation of the Ladysmith Visitor Centre.

In Steering Committee discussions, it was noted that a prospective Visitor Centre, located within a fully developed Ladysmith Waterfront, could serve as a more formal business attraction, retention and expansion center. This would involve forming strategic partnerships that would drive a new and innovative approach to service delivery at the VIC, and that takes into account a combined tourism/business/resident attraction website. A waterfront VIC could also be co-located with retail, business incubation and cultural-heritage facilities to create a more dynamic and sustainable operating model.



3. EVALUATION OF OPPORTUNITIES

“New residents create an expansion of the local consumer market through their household spending and expand the local labour market in their role as workers and entrepreneurs.”

3. EVALUATION OF OPPORTUNITIES

The focus of this section is the evaluation and prioritization of the 22 projects/opportunities listed in section 2.3. The desired result is to identify the best projects for the Ladysmith community partners to actively pursue, based on a combination of largest economic impact, those most likely to succeed given Ladysmith's competitive position, and those most open to influence from economic development initiatives.

3.1 Screening Filters

The first level of evaluation is several filters that are “pass/fail.” These provide an initial review of whether the project/opportunity is suitable for a community-level partnership. As noted above, projects that are rejected by the filters may still be valid opportunities for a different type of strategy.

Filter #1 – Traded Sector?

The distinction in this filter is between (i) traded sectors, which sell to markets beyond the local area, and (ii) local-serving sectors, which are primarily selling to residents and other businesses in the local area.

Traded sectors are the drivers of a local economy because they are not constrained by the size of their home market. Companies that sell to larger markets are forced by competition to be innovative and to operate as efficiently as possible, often leading to higher productivity, more capital investment, more research and development, and higher wages. Productivity and investment and innovation are important for local-serving sectors too, but the community growth impacts are more limited by the size of the local market.

Project/Opportunity	#1 – Traded Sector?
Aquaculture development	YES
Arts and Heritage Hub development	YES
Downtown enhancement	YES
Downtown shopping promotion	YES
Festival expansion and promotion	YES
Highway commercial	YES
Industrial business development	YES
Marina expansion and fuel dock development	YES
Marine-related services or light manufacturing	YES
Mountain bike trail development	YES
Multi-modal transportation facility	YES
New Visitor Centre	YES
Post-secondary institution	YES
Regional trail development	YES
Residential attraction (prime-age demographic)	YES
Residential development (general)	YES
Seafood plant	YES
Seniors housing development	YES
Technology sector attraction	YES
Tourism marketing (general)	YES
Tourism signage (wayfinding)	YES
Walking tour app development	YES

Tourism is considered a traded sector because its market is people living outside the local area. Some public-sector organizations are also classified as traded sectors if they are funded primarily at a non-local level – examples include federal and provincial government offices, public post-secondary institutions, and hospitals.

In this report, initiatives that attract or retain residents are also considered part of the traded sector. New residents create an expansion of the local consumer market through their household spending and expand the local labour market in their role as workers and entrepreneurs. Seniors housing does not make the same direct contribution to the supply of workers, but seniors housing facilities will create local jobs and are often supported partly through external government funding or private pensions and investments.

As shown in the accompanying table, all 22 opportunities are considered part of the traded sector.

Downtown enhancement is included because it makes the community more attractive for tourism, enhances the street vitality and “sense of place” of the downtown area (which makes the community more attractive to potential residents and investors), and supports the attraction of new businesses downtown.

Filter #2 – High-Level Fit as a Local Initiative?

The primary purpose of this filter is to make an initial, high-level assessment of whether the opportunity is best pursued locally or through broader partnerships.

The following five opportunities are removed from further consideration:

Industrial business development; Marine-related services or light manufacturing. These two opportunities are related to industrial land, which is being considered in detail as part of a separate Industrial Land Use Study through Economic Development Cowichan. Despite removing these opportunities from the current analysis, there are several strategies in Section 4 related to industrial land based on its value in supporting quality jobs (particularly for mid and low-skilled workers) and its importance to the municipal tax base.

Multi-modal transportation facility. While the rationale for this opportunity appears sound given Ladysmith’s proximity to highway, air, and ocean transportation routes, the idea requires further study to determine land and labour requirements, market potential, possible operating models, etc.

Regional trail development. This opportunity is regional in nature and while Ladysmith has a role to support regional trail connectivity and new trail development, it is best pursued as a regional initiative rather than by the local Ladysmith partners.

Technology sector attraction. Economic development initiatives to build the technology sector are already underway within the Cowichan Valley and at a broader Vancouver Island level. Ladysmith is well positioned to host tech companies and can support these initiatives by partnering on developing a technically skilled workforce, enhanced fiber connectivity, post-secondary facilities, and through efforts to attract a younger demographic to the region.

Project/Opportunity	#2 – Fit for Local?
Aquaculture development	YES
Arts and Heritage Hub development	YES
Downtown enhancement	YES
Downtown shopping promotion	YES
Festival expansion and promotion	YES
Highway commercial	YES
Industrial business development	REGIONAL
Marina expansion and fuel dock development	YES
Marine-related services or light manufacturing	REGIONAL
Mountain bike trail development	YES
	REQUIRES FURTHER STUDY
Multi-modal transportation facility	STUDY
New Visitor Centre	YES
Post-secondary institution	YES
Regional trail development	REGIONAL
Residential attraction (prime-age demographic)	YES
Residential development (general)	YES
Seafood plant	YES
Seniors housing development	YES
Technology sector attraction	REGIONAL
Tourism marketing (general)	YES
Tourism signage (wayfinding)	YES
Walking tour app development	YES

Filter #3 – Requires Economic Development Support?

This filter is used to distinguish between (i) projects/opportunities that are likely to realize their potential only with economic development support, which may include project funding, and (ii) projects/opportunities that are already proceeding and do not currently need active economic development support.

For the purposes of this strategy, the following eight opportunities are removed from current consideration:

Aquaculture development; Seafood plant.

These two opportunities are related, and both are being led by the Stz'uminus First Nation (SFN) under their own process and access to business development funding. There is not currently a role for active participation of other community partners in bringing these opportunities to fruition, although the economic benefits of expanded aquaculture and seafood product processing would be felt throughout the local area.

Highway commercial. This opportunity is currently focused primarily on the SFN Oyster Bay development, with potential for future growth on the Nanaimo Airport's highway frontage and modest growth and redevelopment within municipal borders. Development of the Oyster Bay site is managed by SFN's Coast Salish Development Corporation, which has successfully attracted multiple national companies in retail, accommodation and housing. Broader community initiatives to expand tourism and attract residents to the area will benefit the Oyster Bay development, but there are no collaborative project opportunities relating to highway commercial at the present time. Future commercial growth at the Nanaimo Airport will similarly be complementary to regional tourism and residential growth.

Downtown enhancement; Tourism signage (wayfinding). Downtown enhancement activities and signage improvements are already underway and are being funded by the Town of Ladysmith. Investment in downtown infrastructure and in tourist signage will remain viable candidates for future collaboration among community partners.

Post-secondary institution. The potential benefits for Ladysmith to attract a post-secondary institution are significant and are being pursued by the Town and Economic Development Cowichan.

General and seniors housing. There is currently significant interest from developers and service organizations in general and seniors housing and multiple projects are underway or in the planning stages. Given the continued growth of the Vancouver Island housing market, developer interest is likely to remain strong for the foreseeable future. The community need for attainable housing is being addressed by local and regional not-for-profits and will require local government cooperation and support that is outside the confines of this study.

Project/Opportunity	#3 – Requires Support?
Aquaculture development	TBD
Arts and Heritage Hub development	YES
Downtown enhancement	IN FUTURE
Downtown shopping promotion	YES
Festival expansion and promotion	YES
Highway commercial	NO
Marina expansion and fuel dock development	YES
Mountain bike trail development	YES
New Visitor Centre	YES
Post-secondary institution	IN FUTURE
Residential attraction (prime-age demographic)	YES
Residential development (general)	IN FUTURE
Seafood plant	TBD
Seniors housing development	IN FUTURE
Tourism marketing (general)	YES
Tourism signage (wayfinding)	IN FUTURE
Walking tour app development	YES

3.2 Rating of Opportunities

The next stage in the evaluation process is the rating of the remaining 9 projects according to a series of criteria that fit into two general categories: (i) assessing the potential benefit to the community from each opportunity; and (ii) assessing Ladysmith’s competitive fit for each opportunity.

Caveat

The rating scales for each criterion are explained in the discussion below, but it must be noted that even though this analysis has the appearance of a precise mathematical exercise, it is providing only an overall assessment of the positive, negative, or mixed status of each opportunity.

Economic Impact Assumptions

The “Scale of Economic Impact” variable is based on preliminary assumptions about the type of economic activity that would be generated by successful completion of each project. Most projects require a start-up period to become known among their target market and to start operating at full efficiency, so the estimates are for 3 to 5 years following project completion.

Project/Opportunity	Economic Impact Assumption
Arts and Heritage Hub development	<ul style="list-style-type: none"> An additional 15,000 people per year visiting the Ladysmith Art Gallery, the Harbour Heritage Centre and other new attractions in the facility. This is based on double current Art Gallery attendance of 11,000 plus growth for other attractions. Each additional visitor is assumed to be a tourist. Each tourist visit corresponds to 0.5 additional days spent in Ladysmith.
Downtown shopping promotion	<ul style="list-style-type: none"> Four bus tours per year with 40 people per tour. Retail and food service spending per person per day is \$250. These figures are arbitrary and require further research.
Festival expansion and promotion	<ul style="list-style-type: none"> Festival attendance for some of the more successful mid-Island events ranges from just over 30,000 for the evening of Ladysmith’s Festival of Lights to more than 130,000 for the multi-day Parksville Beach Festival. Provided a Ladysmith community group was sufficiently motivated, with ideas for festival expansion or a new event and an available pool of volunteers, an achievable goal is 6,000 additional visitor-days for an event like Ladysmith Days.
Marina expansion and fuel dock development	<ul style="list-style-type: none"> Approximate doubling of existing moorage space at Ladysmith Community Marina and establishment of a marine fuel facility would attract both overnight stays and fueling stops from transient boaters. Additional 3,000 boat-nights and 1,500 shorter stops for fuel and other supplies and services. This is an approximation based on previous economic impact assessments in Ladysmith and other communities of moorage expansions of similar scale.
Mountain bike trail development	<ul style="list-style-type: none"> Visitor spending impacts estimated relative to Squamish, which had a mountain biking economic impact study completed in 2014 showing nearly \$10 million in annual visitor spending. Ladysmith impacts are estimated at 1/15th the level of Squamish after 3-5 years of growth, or about \$650,000 per year. Per trail impacts are assumed to be only one-third as high in Ladysmith given Squamish’s proximity to other biking destinations like North Vancouver and Whistler and its more established tourism infrastructure like accommodations and gear shops.

New Visitor Centre	<ul style="list-style-type: none"> • A 50% increase in visits to the Visitor Information Centre (VIC) would occur if the VIC was moved to a more prominent location. Visitors to the Ladysmith VIC declined by 18% from 2012 to 2017. • 10% of additional VIC visitors spend one extra day in Ladysmith, and 30% find a new activity for a few hours, similar to VIC economic impact studies in other communities. • The success of a new VIC would be keyed to developing new and sustainable co-location partnerships and a more dynamic role for the Ladysmith Chamber of Commerce in business and resident attraction.
Residential attraction (prime-age demographic)	<ul style="list-style-type: none"> • Permanent residential attraction has a fundamentally deeper economic impact on a community, depending on the labour skills, business ideas, and personal characteristics of the new residents. • For purposes of enabling a comparison to other projects in this analysis, the estimated local household spending impacts of new residents are counted. • An extra +1 is added to the score to account for positive economic impacts on labour force and entrepreneurship. • Assume a 0.5% increase in new households after five years, over and above other population growth that would occur (this is about 19 households, or nearly 4 per year over a five-year period). • Assume total current consumption per household is the same as the BC average (\$64,600). Note this ignores the significant spending typically associated with establishing a new home. • Assume 75% of spending is captured locally, based on estimated retail leakage out of Ladysmith (based on Ladysmith having 4.3 locally-based retail jobs per 100 residents compared to 5.7 in the Vancouver Island and Coast region).
Tourism marketing (general)	<ul style="list-style-type: none"> • It is reasonable to assume that with updated online tools (for example, more targeted advertisements through Google or Facebook), that additional visitors can be attracted to Ladysmith.
Walking tour app development	<ul style="list-style-type: none"> • A growing number of communities have walking tour apps available, but usage figures are not available. • Past visitor surveys in the region suggest there is strong interest in historic sites, museums, local shops and artisans, all of which will benefit from the app.
General assumptions	<ul style="list-style-type: none"> • Economic impacts calculated using multipliers from Statistics Canada's BC Input-Output Model for 2013. • Per-day spending estimates for general tourists and boaters, as well as the distribution of that spending into categories, based on past BC visitor surveys and the national Travel Survey of Residents of Canada. • All data assumptions are part of a community economic impact model developed by Vann Struth Consulting Group over the last 15 years and regularly used to assess projects in Vancouver Island communities on behalf of Island Coastal Economic Trust and other clients. • The "Scale of Economic Impact" variable uses a rating of +1 for every 5 local jobs in the economic impact assessment.

The results of these preliminary economic impact assessments and related variables are shown in the table below.

Potential Benefits Criteria

Project/Opportunity	Scale of Economic Impact (+1 per 5 local jobs)	Local Fiscal Impact (-2 to +2)	Social/Cultural/Sense of Place Impact (-2 to +2)	Potential Benefits TOTAL
Arts and Heritage Hub development	+2	0	+2	+4
Downtown shopping promotion	0	0	0	0
Festival expansion and promotion	+1.5	0	+1	+2.5
Marina expansion and fuel dock development	+2.5	+1	+1	+4.5
Mountain bike trail development	+1.5	+1	+2	+4.5
New Visitor Centre	0	-1	+1	0
Residential attraction (prime-age demographic)	+2.5	0	+1	+3.5
Tourism marketing (general)	+1	0	0	+1
Walking tour app development	+0.5	0	0	+0.5

The “**Local Fiscal Impact**” variable is for projects that generate a net positive or net negative financial impact on local government (which could include Stz’uminus or the Cowichan Valley RD, but for these projects relates mostly to the Town of Ladysmith).

Projects that generate local employment and business activity will generate corresponding local government tax and fee revenue through higher property taxes (from new buildings and improved buildings). They may also generate higher servicing costs for local government depending on their operational model.

The Arts and Heritage Hub, for example, generates positive employment and business impacts that will generate some corresponding increase in local government revenues, but the municipality could incur operations and maintenance costs that offset the revenue.

The marina expansion and mountain bike trail development are rated as a net positive because there will be reduced municipal costs for ongoing servicing. A new Visitor Centre, as a public asset, will have ongoing operating costs and is unlikely to be self-sustaining on its own. However, if a VIC is given a strong business and resident attraction focus, it will provide other economic development advantages to the community.

The “**Social/Cultural/Sense of Place Impact**” variable highlights projects that make a meaningful contribution to the non-economic aspects of quality of life. The Arts and Heritage Hub and mountain bike development are rated highest (+2) because of the contribution they make to community life in general, with special appeal to the artistic and cultural community (including Stz’uminus artists) and to the active, outdoor recreation market.

Other projects that create a new facility or event are also rated positively (+1) while projects that are aimed outside the community (like marketing) or do not create something new that would be used by locals are rated neutral (0).

Competitive Fit Criteria

The next set of rating criteria relate to Ladysmith's competitive fit for each opportunity, under the presumption that opportunities with a very good fit with Ladysmith assets are more likely to be successfully realized in the future.

Project/Opportunity	Provincial/ Regional Growth Trend (-2 to +2)	Real Estate Fit (-2 to +2)	Labour Force Fit (-2 to +2)	Transportation & Location Fit (-2 to +2)	Other Factors (-2 to +2)	Competitive Fit TOTAL
Arts and Heritage Hub development	+1	+2	+1		+1	+5
Downtown shopping promotion		+1		-1		0
Festival expansion and promotion	+1					+1
Marina expansion and fuel dock development	+1	+1		+1		+3
Mountain bike trail development	+1	+2				+3
New Visitor Centre		-1				-1
Residential attraction (prime-age demographic)	-1	-1		+1	+2	+1
Tourism marketing (general)	+1				+1	+2
Walking tour app development	+1	+1				+2

The “**Provincial/Regional Growth Trend**” variable relates to whether the industry or business type is growing, or not, at a provincial and regional level.

Most opportunities are tourism-related, which remains a strong and growing sector provincially, and are rated positively. Residential attraction of the prime-age demographic is rated negatively because it is currently trending downward in the Vancouver Island and Coast region.

The next three variables relate to Ladysmith's competitive assets in real estate, labour force, transportation and infrastructure. These are standard categories for evaluating opportunities and the default rating is neutral (0) unless there are clear advantages or disadvantage with respect to a particular opportunity.

For **real estate**, both the Machine Shop building and existing mountain bike trails are significant assets and are scored favourably. Downtown shopping and the walking tour app both rely on historic downtown real estate, which is a positive asset. A new Visitor Centre is rated negatively because a new building and site preparation are required. Residential attraction is also rated negatively given current shortages of desirable housing for the target demographic.

For **labour force**, shortages of workers are a growing concern, including entry-level workers who are common in tourism. However, none of the opportunities are huge employers and the labour challenges are not necessarily worse in Ladysmith than elsewhere so most opportunities are given a neutral rating. The only positive labour force rating is the Arts and Heritage Hub given the pool of artists that has developed over time in the community.

For **transportation and location**, most opportunities are rated neutrally. Even though tourism in Ladysmith benefits from proximity to the Island Highway, Nanaimo Airport and ferry terminals, but the Vancouver Island location is an extra hurdle for potential tourists from the mainland. The marina expansion project is +1 because it has a very favourable location for recreational boaters exploring the Island and Coast from the South Island, Lower Mainland or United States.

Ladysmith's location, with proximity to air transport links especially, is a plus for residential attraction. Only the downtown shopping opportunity is rated negatively because the Lower Mainland is a key market and the ferry is sometimes an obstacle for visitors compared to participating in existing shopping tours to Washington State.

The **Other Factors** variable is a catch-all for important issues not covered elsewhere that affect which opportunities could be pursued as community partnerships. Prime-age residential attraction is given the highest rating due to the factors outlined in section 2.4, relating to sense of community, affordable housing, heritage character, etc. The Arts and Heritage Hub is also rated positively due to the significant investment already announced in the Machine Shop building and the need to leverage that investment to achieve maximum benefits for the community. Tourism marketing is also rated positively because it will remain an ongoing priority of the community that will require the development of a multi-purpose tourism and business attraction website.

Summary of Opportunity Ratings

The opportunities are shown in order from highest to lowest overall rating in the table below.

Project/Opportunity	Potential Benefits TOTAL	Competitive Fit TOTAL	OVERALL TOTAL
Arts and Heritage Hub development	+4	+5	+9
Marina expansion and fuel dock development	+4.5	+3	+7.5
Mountain bike trail development	+4.5	+3	+7.5
Residential attraction (prime-age demographic)	+3.5	+1	+4.5
Festival expansion and promotion	+2.5	+1	+3.5
Tourism marketing (general)	+1	+2	+3
Walking tour app development	+0.5	+2	+2.5
Downtown shopping promotion	0	0	0
New Visitor Centre	0	-1	-1

There ratings do not necessarily reflect the preferences of the project partners with respect to their priority. They are instead, one mechanism for determining how economic development return may be calculated.

3.3 Overview of Grant Funding Options

Economic development funding options from granting organizations are discussed in this section in terms of “best fit” to identified Ladysmith economic development priorities, maximum funding available and implications for matching, timing constraints, past funding examples, and some constraints created by traditional funders who are currently unavailable.

The two funders that appear to be the best fit for Ladysmith economic development priorities are the Island Coastal Economic Trust (ICET) and the BC Rural Dividend program.

ICET

Advantages	Challenges
Significant funding for physical economic development, with a maximum \$400,000 ICET contribution	If over \$50,000, a two-step process requires more time to approval
Requires sophisticated submissions with economic development benefits identified	Requires all pre-planning to be relatively in final form
Many forms of economic development readiness programs available for smaller funding amounts (see list on page 11 in Appendix C)	

Previously approved projects with funding and project summaries available on website:
www.islandcoastaltrust.ca/projects

BC Rural Dividend

Advantages	Challenges
	Most recent funding window closed July 31, 2018 and program future is unknown, pending an updated BC Rural Development Strategy
Can reach \$500,000 maximum if a partnership application is made	Requires most preplanning to be in place
Wide range of project types eligible – community capacity building; workforce development; community and economic development; business sector development	Infrastructure costs limited to 25% of total project cost
Trail funding available and well established and costs not limited to the 25% infrastructure cap	
Available only for communities with populations under 25,000	
Matching funding is positive factor for project development - 100% for small projects (\$10,000) and up to 80% for single applicant projects with a maximum grant of \$100,000	On maximum funding for projects at \$500,000 requires a 40% applicant contribution
Flexible project options related to a variety of community needs	

Lists of approved projects available for previous intakes, an excellent cross check for applicants. See: <https://www2.gov.bc.ca/gov/content/employment-business/economic-development/support-organizations-community-partners/rural-economic-development/rural-dividend/funded-projects>

Government of Canada Economic Development Funding

In past years, federal Western Economic Diversification (WED) grant funding has been represented by two key programs: Western Innovation (WINN) Initiative and the Western Diversification (WDP) program. These funding programs provide significant matching resources for larger projects.

WINN supports small and medium-sized enterprises (SMEs) to move their new and innovative technologies from the later stages of research and development in the marketplace.

WDP is the main WED program which makes strategic investments in initiatives that enhance and strengthen the economy of Western Canada. In short, it supports innovation, business development and/or community economic growth.

Currently, WINN and WDP are not open for applications in British Columbia. In fact, WED is basically absent in BC since it departed from the twice a year intake process in the past.

It is understood that new or additional WED priorities will focus on community partnerships with First Nations for economic development reflecting national priorities. Other significant federal priorities include inclusivity, governance improvement in terms of gender balance, and labour force equality for women in terms of pay and role in management.

Federal economic development is currently focusing on clusters, usually in larger centres, and, in BC at least, no programming for rural and smaller communities.

Community Gaming Grants

Not-for-profits that provide programs or services of direct benefit to the broader community are eligible for support.

These grants complement or support economic development through construction of community infrastructure like docks and parks which create or expand community recreational assets and contribute to community attractiveness for new residents and retain existing residents, including business enterprises.

Advantages	Challenges
Complementary source of funding to local government or First Nations which strengthens community public assets such as for the construction of new facilities, community infrastructure (parks and docks), acquisitions, and facility upgrades. Can include indigenous not-for-profit organizations as applicants.	Must identify not-for-profit eligible organizations willing to submit applications for Gaming Grants. Extensive regulations on eligibility.
Application window opens at a predictable time, from June 1 to July 31 each year.	Planning should be well advanced for this relatively short-term application period

Capital projects can be funded with a total cost of \$20,000 to \$1,250,000	Requires 50% matching of a capital project to a maximum of \$250,000; funding for minor capital projects under \$20,000 available without a capital grant application.
Mandatory eligibility is for primarily community benefit in the following sectors: Arts and Culture; Sport; Environment; Public Safety; Human and Social Services; PACS and DPACs.	Organization must be driven by volunteers; extensive regulations on governance are provided. No playgrounds are eligible this intake.
Excellent application guidelines for applicants and projects as well as assessment criteria for approvals. Plus excellent webinar.	Guidelines are lengthy and very detailed - 60 pages.
Applicant must be registered with Community Grants	All supportive documents must be attached with the application; no mail ins.
Service clubs can act as conduit organizations for distribution of scholarships and bursaries	Various restrictions limit club to precise roles

BC Real Estate Foundation

Advantages	Challenges
Well-established and professionally managed program. Listing of previously funded projects on-line at www.refbc.com/funded-grants .	Only available to non-profits and C3Cs working on land-use in BC; however, local governments can partner on compatible projects. Approved projects list shows some local government involvement as approved project proponents
Has been used by CVRD, Courtenay, Kelowna and Richmond, Islands Trust, Community Futures, and various First Nations	
Two step application process enables a quick read by the Foundation before approving the mounting a major effort for a stage two application	Applications can only be submitted on-line
Two intakes per year for general grants (September 6, 2018 and March 2019. For Industry grants, one intake per year in by December 2018.	
Cost sharing 50/50 % of project budget	Funding is intended for non-capital costs
General Grants: sustainable land use; built environment sustainability; freshwater sustainability; local and sustainable food systems; professional excellence in real estate	Has only limited applicability for economic development but can complement it
Can complement municipally or First Nations led projects in approved grant areas/topics	



4. STRATEGIES

“The Ladysmith Economic Development Strategy has been designed as an action-orientated document that focuses on specific project opportunities for local community partners.”

4. STRATEGIES

This Ladysmith Economic Development Strategy has been designed as an action-oriented document that focuses on specific project opportunities for local community partners.

The recommended strategies are organized into three sections:

- 1. Immediate Priority Projects.** This outlines an approach to securing funding support and moving ahead on priority projects over a period of about nine months (from fall 2018 to spring 2019).
- 2. Medium-Term Economic Development Projects.** This outlines a series of strategies for pursuing other projects that may require more preparatory work or where funding programs are not available in the short term.
- 3. Supporting a Strong Local Economy.** These strategies are not related to specific projects but are designed to improve the local economy and business climate.

4.1 Immediate Priority Projects

The current project funding environment for BC communities is limited for larger capital projects. There is uncertainty over the future of several of the larger programs, including federal funding through Western Economic Diversification, which has been largely absent from the funding landscape in the recent past. Following the summer 2018 intake, the provincial government's Rural Dividend Program is likely to evolve to a modified program in support of a new BC Rural Development Strategy sometime in 2019.

The best short-term approach for Ladysmith is to pursue projects within the existing capital funding that is available, while also taking advantage of smaller projects that are relatively easy wins for the community. It is also a time for planning and developing cost e

Strategy 1. Arts and Heritage Hub development.

- Pursue capital funding from ICET under the Economic Infrastructure program in 2018-2019.
- Pursue Gaming Grant funding through the Ladysmith Regional Arts Council (LRAC).
- Pursue Cultural Spaces funding through the LRAC.
- **Project Lead:** Town of Ladysmith, with support from Ladysmith Regional Arts Council, Stz'uminus First Nation and other community partners.



This is the highest-scoring opportunity in the ratings in section 3.2 and has been a key focus for the Town of Ladysmith. The project is increasingly well-defined and ready for further development.

Strategy 2. Walking tour app development.



- Pursue Quick Start Implementation funding from ICET under the Economic Development Readiness program.
- Pursue support through the BC Smart Communities Pilot Project.
- **Project Lead:** Ladysmith Chamber of Commerce with funding support from the Town of Ladysmith and content provided by the Ladysmith Heritage Society, Stz'uminus First Nation, the Ladysmith Maritime Society and other partners.

The walking tour app scored lower in terms of total economic impact than some other opportunities but can be successfully completed at a modest project cost. The project parameters have been well developed based on prior work completed by the Chamber and other project partners.

Strategy 3: Develop project parameters and pursue funding for online investment and resident attraction tools to be combined with tourism promotion.

- Position the Ladysmith Chamber of Commerce to play a leadership role in conveying the Ladysmith brand. This positioning will include creating, promoting and managing online and website tools related to tourism, business and resident attraction.
- All online tools should be closely integrated with Tourism Cowichan and Economic Development Cowichan websites.
- Align tourism promotion strategies with those of the Tourism Cowichan Society and jointly seek support from the Province's Destination Marketing Program.
- Pursue funding from ICET under the Investment Attraction Tools stream of the Economic Development Readiness program in fall 2018 or early 2019.
- Long-term, this strategy may involve creating a business and resident attraction hub at a new Visitor Information Centre to be located within the Ladysmith Waterfront Development Plan catchment area.
- **Project Lead:** Ladysmith Chamber of Commerce, with funding support from Town of Ladysmith (including existing tourism promotion funds) and other community partners to assist with information, including Economic Development Cowichan.

As noted in section 2.4, investment attraction and resident attraction are two sides of the same coin. Most new residents and business investors visit a community first as tourists, before making the choice to live and invest in a location. Ladysmith has an opportunity to effectively combine these synergies.

Strategy 4: Develop a funding-ready plan for mountain bike trail development



- In collaboration with the Ladysmith Trail Alliance, create a fully-costed program of desired improvements, including further trail development, surveying and mapping, signage, etc.
- In early 2019, explore the possibility of funding support from ICET (through the Economic Infrastructure program) and the Community Gaming Grants program (in which case the Trail Alliance or other non-profit would be the applicant) under the rationale that trail infrastructure is a freely-available public benefit.
- Monitor the elements of the revised BC Rural Dividend Program, or whatever alternative program emerges from a new BC Rural Development Strategy, for funding options in spring and summer 2019. The current Rural Dividend Program has a funding stream for trails, including a higher permissible share for capital expenditures, but the future of this funding stream is currently unknown.
- Monitor other funding programs that may emerge, including possible new federal opportunities through Western Economic Diversification and Bike BC.
- **Project Lead:** Town of Ladysmith, in partnership with Ladysmith Trial Alliance and other local partners.

The possible benefits of mountain bike trail development extend beyond the tourism impact from bikers themselves and include enhancements to Ladysmith’s recreational infrastructure in an area that is highly desirable to the prime-age demographic of entrepreneurs and skilled workers.

4.2 Medium-Term Development Projects

These are projects that will not go ahead for funding applications before the spring/summer of 2019, but for which planning work can be started.

Strategy 5: Develop a funding-ready program for marina expansion and fuel dock development.

- In collaboration with Stz'uminus First Nation and possible private and not-for profit sector partners in the harbour, create a fully-costed program for building and reconfiguring floats at the Community Marina, as well as required supportive infrastructure including: breakwater and marine fuel facility.
- Stz'uminus First Nation may view a marine fuel facility as a potential business opportunity for their waterfront lands. Multiple First Nations in coastal BC have developed marine fuel facilities in recent years, including the Ahousaht First Nation near Tofino and the Kitasoo First Nation at Klemtu on the Central Coast.
- Ensure the necessary technical analyses have been completed in support of the expanded facility, such as wind and wave studies to determine optimal breakwater type and location.
- Explore feasibility of partial funding support from the BC Gaming Grants program for publicly accessible features of the project.
- Monitor the availability of funding programs for larger capital projects as this may have larger capital costs than nearly any other community project under consideration. Candidates include Western Economic Diversification, the possible successor to the BC Rural Dividend program that may allow more than the current maximum of 25% for capital expenditures, and ICET (currently capped at \$400,000 for the Economic Infrastructure program).
- Fuel dock development may be part of the same planning process, but likely needs to be excluded from funding applications given that funds cannot be used to subsidize a private business.
- **Project Lead:** Town of Ladysmith, in partnership with Ladysmith Maritime Society, Small Craft Harbours, Stz'uminus First Nation, and other local partners, including possible private interests in the harbour.

The exact timing of when to proceed with the project may depend on other developments in the larger Waterfront Plan, but it is one of the highest-scoring opportunities in terms of economic impact and competitive fit in Ladysmith.

Strategy 6: Support Stz'uminus First Nation in expanding aquaculture production and establishing a seafood processing facility.

- These initiatives may generate significant economic benefits for Stz'uminus people and the local area through business supply linkages and possible employment opportunities.
- The nature of the support for Stz'uminus may be in the form of supporting regulatory or funding applications. Other opportunities to help should be identified through ongoing discussions between the partners.
- **Project Lead:** All community partners in collaboration with Stz'uminus.

Successful realization of this opportunity is linked to the strengthening of the overall marine sector in the Ladysmith area, including enhanced support services such as repair services and marine supplies and tourism and consumer development such as dockside fish markets.

Strategy 7: Continue to pursue the establishment of a post-secondary facility in Ladysmith.

- Discussions with potential post-secondary partners are ongoing and should be continued.
- Monitor the need for a specific community project that would assist with post-secondary development, such as developing a site or facilities.
- **Project Lead:** Town of Ladysmith and Economic Development Cowichan.

The potential community benefits in terms of direct operating impacts, attraction of skilled workers, tourism-type impacts from student residents, and creation of community-accessible programming are also potential upsides of this opportunity.

Strategy 8: Continue to pursue and support residential development.

- Actively seek to attract residential developers, including for multi-family development on the waterfront and future seniors housing needs.
- Continue to participate and monitor activities related to attainable housing development by local non-profit organizations.
- **Project Lead:** Town of Ladysmith, in partnership with Stz'uminus First Nation and other local partners.

Residential development and modest population growth will allow Ladysmith to expand its local workforce, will create a larger resident market for local businesses, will ensure that important public services and facilities (e.g., programs for children) and maintained and improved, and will allow for community character and social cohesion to remain.

Strategy 9: Continue to develop new event and promotional ideas for Downtown Ladysmith.

- Downtown Ladysmith is an essential asset for the community and various initiatives and recommendations in the Economic Development Strategy relate to the downtown.
- Pursue funding support for new project ideas if and when they arise, such as new events or new capital investments to support street vitality.
- Consider the development of shopping bus tours as a promotional vehicle for Downtown Ladysmith. The direct economic impact of tours is modest, but the larger promotional and word-of-mouth marketing benefits may be significant.
- **Project Lead:** Town of Ladysmith, in partnership with Downtown Ladysmith Business Association, Ladysmith Chamber of Commerce, and other local partners.

Strategy 10: Continue to support region-wide economic development initiatives.

- Examples of regional initiatives include regional trail development, regional technology sector attraction, and regional industrial land studies and film promotion.
- Within the tech and film sectors, isolate and pursue opportunities to locate educational training activities in Ladysmith and position the community to welcome new activity across the tech spectrum, from advanced manufacturing to entrepreneurial tech start-ups.
- Downtown Ladysmith has increasingly become a preferred location with major film producers because of its small-town ambience and historic charm. Ladysmith municipal staff and the business community will require continued support from Film Cowichan and the regional film commissions in their efforts to accommodate film activity.
- Ensure that Ladysmith opportunities such as marine-related manufacturing, marine repair and maintenance services, and value-added forestry and advanced manufacturing are identified as business attraction opportunities within the Cowichan Industrial Land Use Action Plan. The plan, which is due for release in November 2018, will include recommendations for how municipal planning departments across the region and Economic Development Cowichan can collaborate to support new industrial development.
- **Project Lead:** Economic Development Cowichan, Film Cowichan and local Ladysmith partners.

Strategy 11: Support an expanded range of tourist activities.

- Many specific project ideas discussed in this report relate to tourism, but there is an ongoing need for the number and range of tourist options in Ladysmith and the surrounding area to be expanded.
- New ideas should continually be discussed and many may be suitable for future funding applications.
- **Project Lead:** All community partners.

4.3 Supporting a Strong Local Economy

The strategies in this section are not specific to any project but represent responses to highlighted business climate issues and are intended to support a better overall economy for all local industries.

By their nature, many of the issues concerning regulation and taxation relate primarily to the Town of Ladysmith, but all local organizations have a role in supporting a healthy and vibrant local economy.

Strategy 12: Support an expanded supply of industrial land.

- Partnerships with Stz'uminus First Nation will be a priority in bringing new industrial land to market.

Strategy 13: Continue and expand access to tools and resources for business owners.

- The Ladysmith Downtown Business Association and Ladysmith Chamber of Commerce are the natural leads to providing and/or facilitating access to these services.
- Ensure that local businesses are aware of resources and programs available through Community Futures Central Island and other mentoring and/or funding organizations, including coaching opportunities as a substitute or complement to training opportunities.
- Consider pursuing provincial funding for a future business retention and expansion (BRE) pilot that creates a collaboration between the Ladysmith Chamber of Commerce and Economic Development Cowichan.

Strategy 14: Pursue enhanced transportation options linking Stz'uminus to Ladysmith



- This will provide better access to goods and services for Stz'uminus members but also increase the supply of locally-available labour.

Strategy 15: Continue to implement development approval process recommendations

- To support improved relations with local developers, the Town of Ladysmith recently conducted a Development Approval Process Review. The town is now acting on recommendations pertaining to OCP amendments, rezoning and development permits. All partners can play a role in supporting and promoting this process.

Strategy 16: Support the continued presence of traditional industries in Ladysmith.

- The Ladysmith based sawmills are the largest remaining heavy industry operators and their presence and continued success should be valued as the mills are significant local employers and industrial taxpayers.
- Resource-based manufacturing operations have among the highest economic impact for a community on a per-job basis and provide among the highest-quality employment opportunities for low and mid-skilled workers.

Strategy 17: Continue to invest in downtown vitality and place-making.

- This includes addressing issues like parking, goods movement for existing businesses (particularly when the streets are full of visitors), and access and wayfinding for public services (e.g., washrooms).

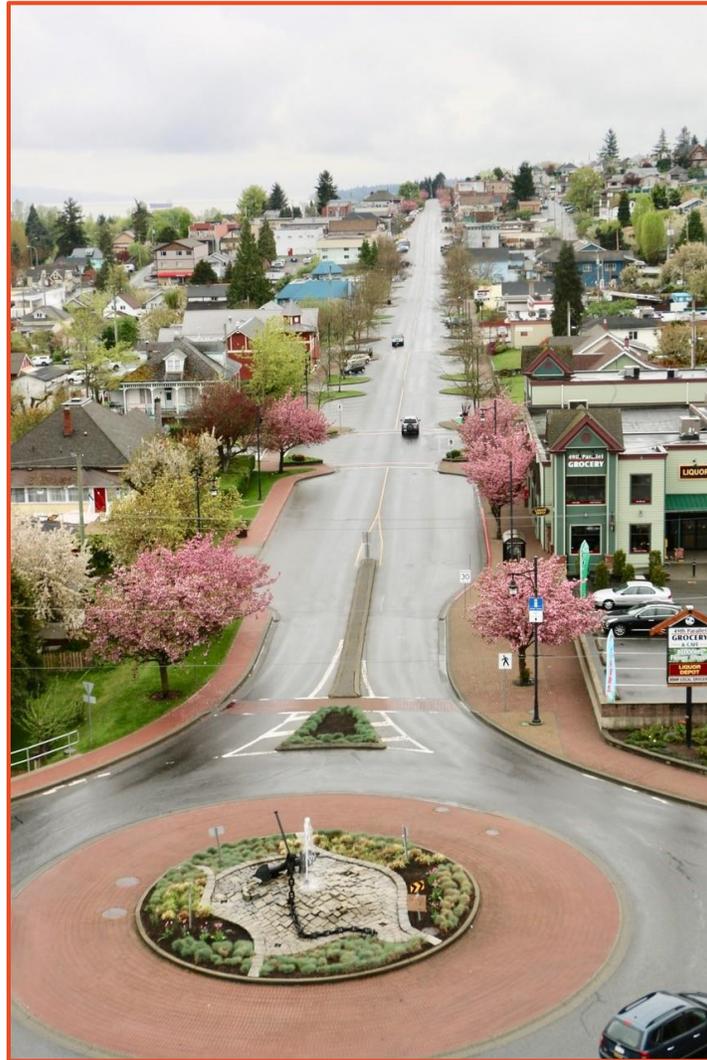


IMAGE: DUCK PATERSON PHOTOGRAPHER

APPENDIX A: ECONOMIC ANALYSIS

The statistical data and commentary shown in this appendix is based on presentations given to the project Advisory Committee in May and June 2018. Insights from the analysis are incorporated into the Competitive Assessment in Section 2 of the report.

Overview

The economic analysis covers a range of topics on the Ladysmith economy, labour force, and population. By examining how this information changes over time and how Ladysmith compares to other communities, it is possible to gain insight into some of the strengths and weaknesses of the community and to set priorities for economic development activities that will be keyed to the population and to areas of strength within the study area.

While most of the data shown in this section is for the Town of Ladysmith, selected references have been included for the Stz'uminus communities and the surrounding rural areas. Data sources are noted throughout, but the largest source of data at a community level is the national Census, last conducted in 2016.

Benchmark Group

It is always useful when looking at the economic data for a community to put the numbers into context. A practical approach to developing this context is to compare Ladysmith to a group of similar communities.

The “benchmark group” of communities for Ladysmith has the following characteristics:

1. Similar in population (in the range of 5,000 to 13,000 people).
2. Located in Vancouver Island and Coast, Okanagan or Kootenay regions due to the similarities between these areas in demographics and economic structure, including a traditional reliance on resource industries, the importance of tourism and recreation, and a growing focus on lifestyle-focused entrepreneurs as well as retirees.

The 15 communities that meet these characteristics include 7 from the Island and Coast region:

- | | |
|-------------------|---------------|
| 1. Ladysmith | 5. Parksville |
| 2. Powell River | 6. Duncan |
| 3. Sechelt | 7. Sidney |
| 4. Qualicum Beach | |

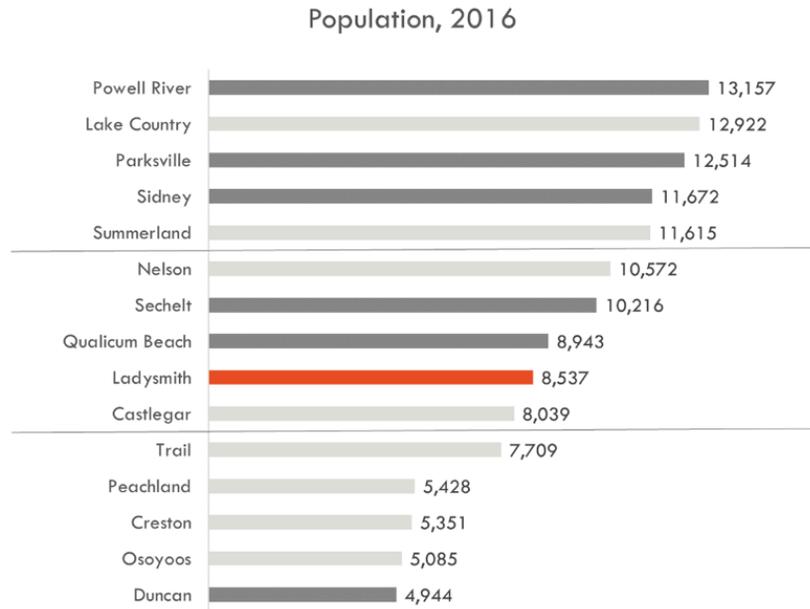
...and 8 more from the Okanagan or Kootenay regions:

- | | |
|-----------------|---------------|
| 8. Lake Country | 12. Nelson |
| 9. Peachland | 13. Castlegar |
| 10. Summerland | 14. Trail |
| 11. Osoyoos | 15. Creston |

Census Population

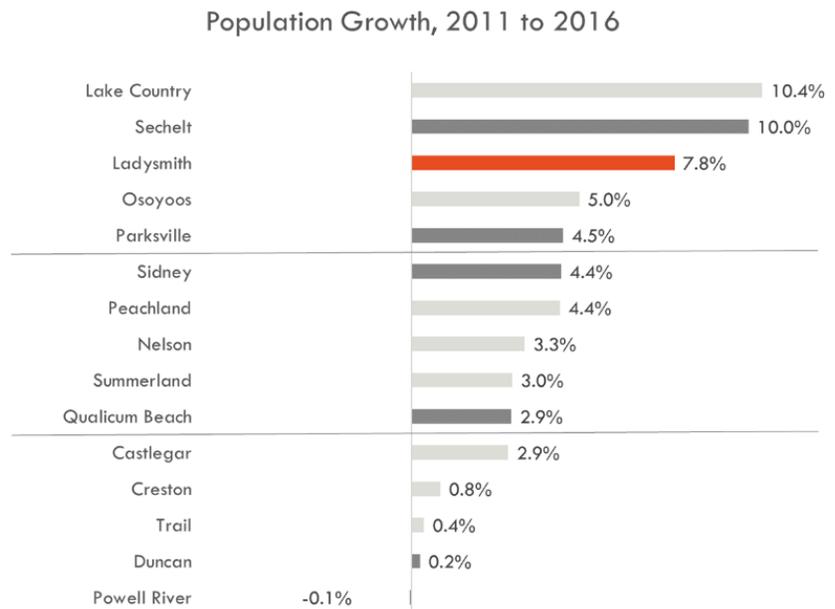
Ladysmith ranks near the middle of the 15-community comparison group.

The darker grey bars are the other Island and Coast communities and most of them are larger than Ladysmith in population. The lighter grey bars are Okanagan or Kootenay communities.



Population Growth

Within the benchmark group, Ladysmith was one of the fastest growing communities in terms of overall population from 2011 to 2016.

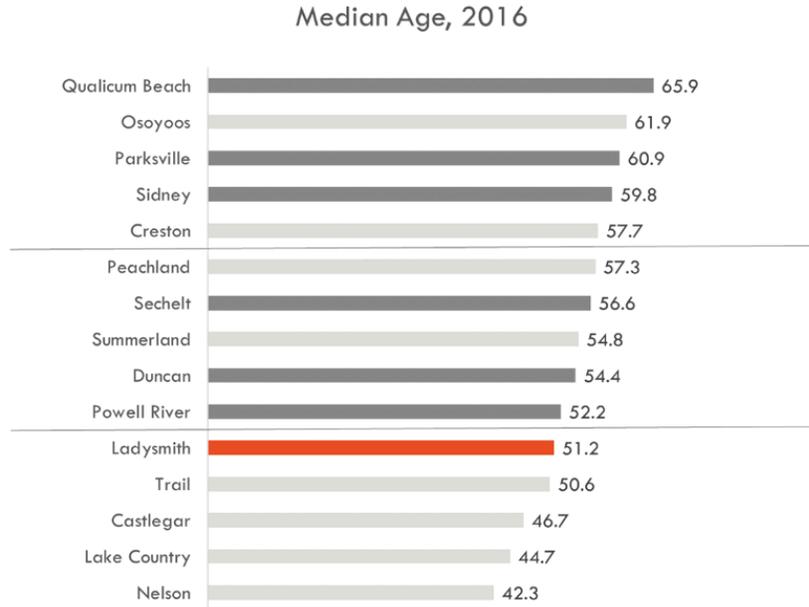


Median Age

Ladysmith's median age of 51.2 is the lowest among the comparable Island and Coast communities, but still significantly higher than the BC median of 43.0 years.

Most communities of Ladysmith's size in the southern part of the province have an older age profile than the BC median.

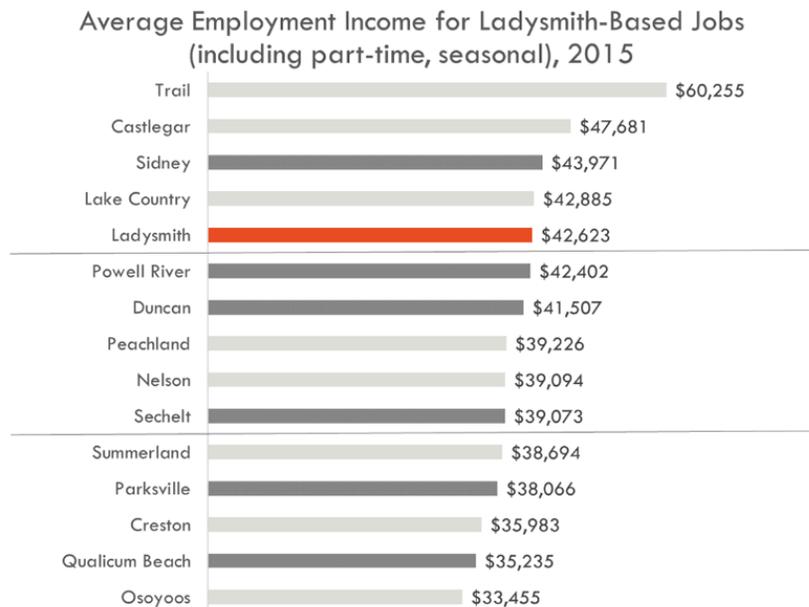
The Stz'uminus communities have a much younger population. For example, the Oyster Bay median age was 20.



Employment Income

Average employment income in Ladysmith is in the upper tier of the comparison communities.

These figures refer to jobs with a usual place of work in Ladysmith.

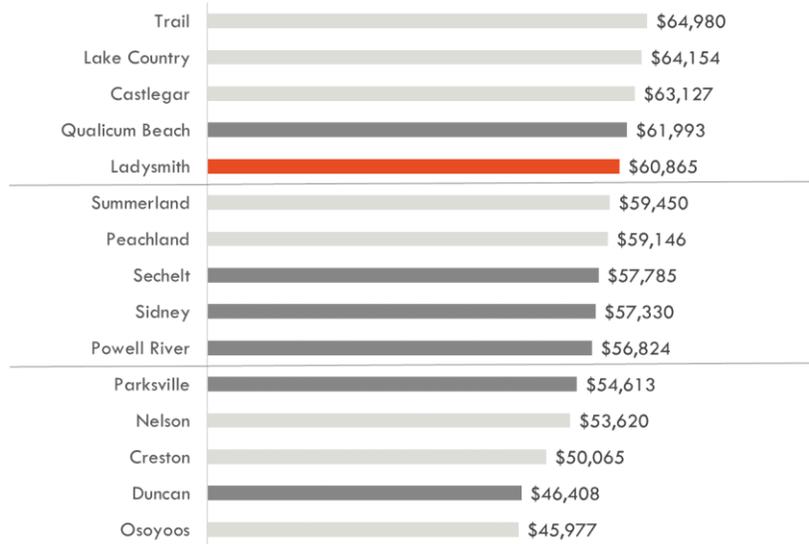


Employment Income (Full-Year and Full-Time)

Ladysmith ranks 5th for average incomes by residents working full-year and full-time (including those who commute to work elsewhere).

Elsewhere in the local area, average full-year, full-time income is slightly higher for Area H residents (\$61,500) and slightly lower for Area G residents (\$57,700), but only about half as much for Chemainus Reserve residents (\$30,500).

Average Employment Income for Residents Working Full-Year and Full-Time, 2015

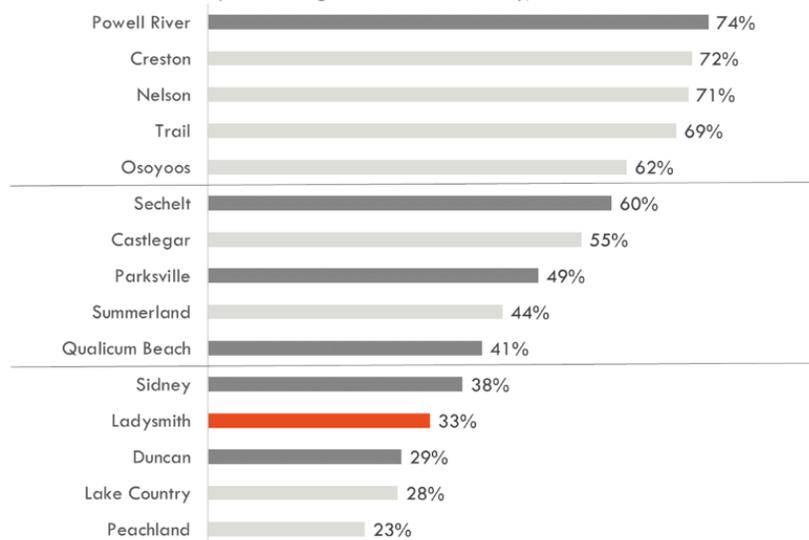


Work in Home Municipality

Given its location between two larger urban areas (Nanaimo to the north and Duncan/North Cowichan to the south), Ladysmith residents have access to employment opportunities throughout the Central Island and consequently only one-third have a fixed place of work within municipal borders.

Other communities that are more isolated tend to have a much higher percentage of residents working in their home community.

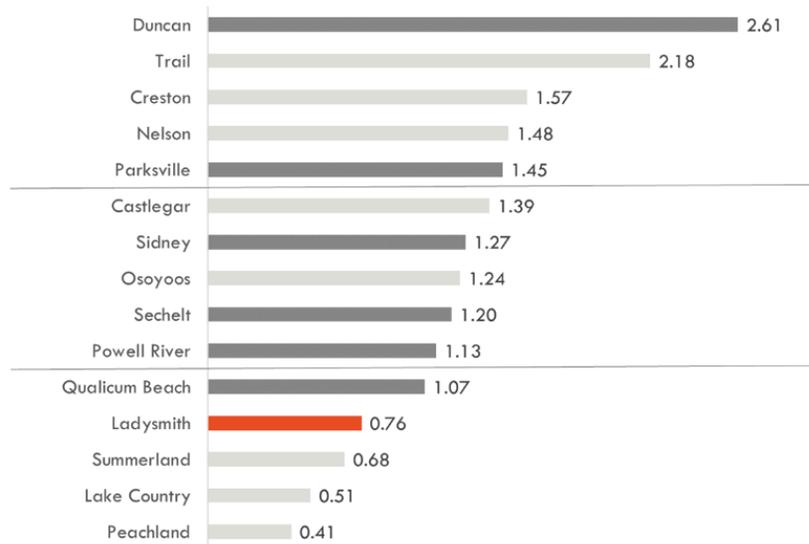
Usual Place of Work in Home Municipality (including Work at Home), 2016



Jobs per Working Resident

Related to the previous section, Ladysmith residents have the benefit of proximity to larger employment centres, meaning the community is a net exporter of commuters. Ladysmith is a net importer of workers from its immediately surrounding neighbours - Chemainus Reserve, Cowichan Valley Areas G and H, and Nanaimo Area A (including Cassidy).

Jobs to Working Residents Ratio, 2016

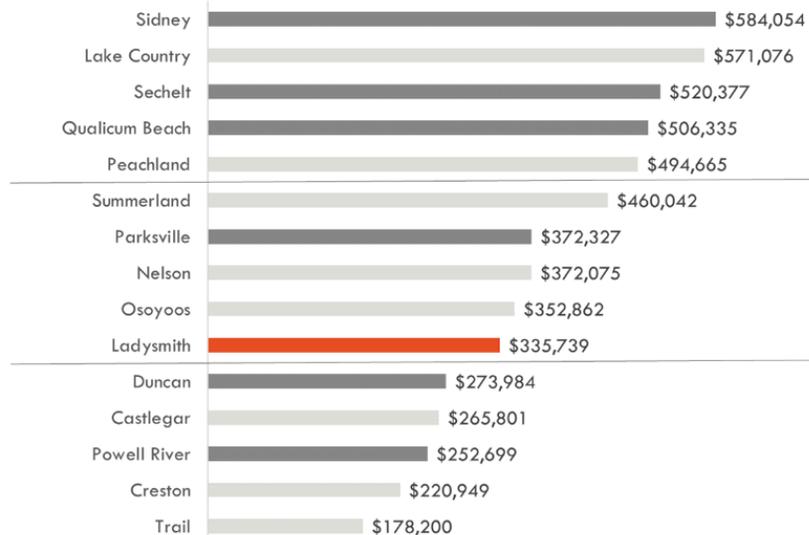


Other similarly-sized municipalities in the region function as more of a commercial centre for neighbouring communities, such as Duncan functioning as the downtown for the much larger region North Cowichan.

Average Home Value

The data in this chart is dated, but the purpose is to show how Ladysmith compares to other communities. Assessment data has the advantage of being collected in a consistent fashion for all BC communities.

Average Assessed Value for Single Family Home, 2017 Assessment Roll



Ladysmith's average single-family home price ranked in the middle tier among the comparable communities, higher than Duncan but lower than Sidney, Qualicum Beach and Parksville among the Vancouver Island comparables.

Property Taxes and User Charges

Combined property taxes and user charges for the average single-family home are higher in Ladysmith than most comparable communities.

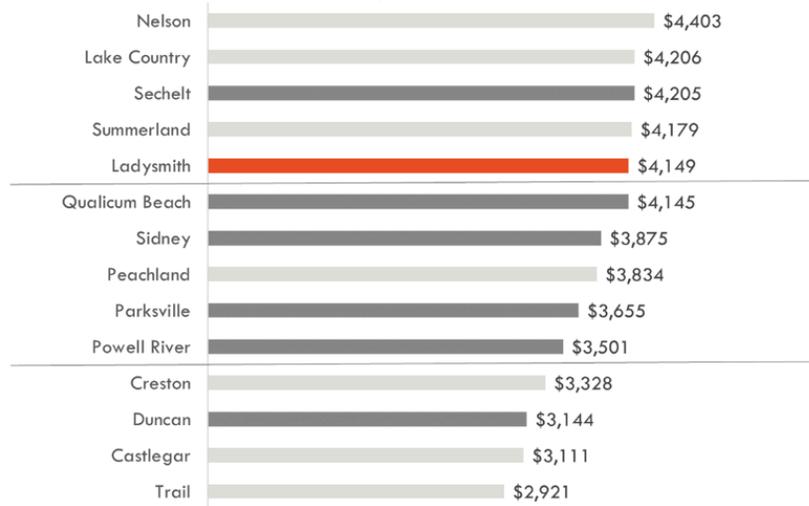
Each community offers a different mix of locally-funded services, amenities and standards.

Post-Secondary Credentials

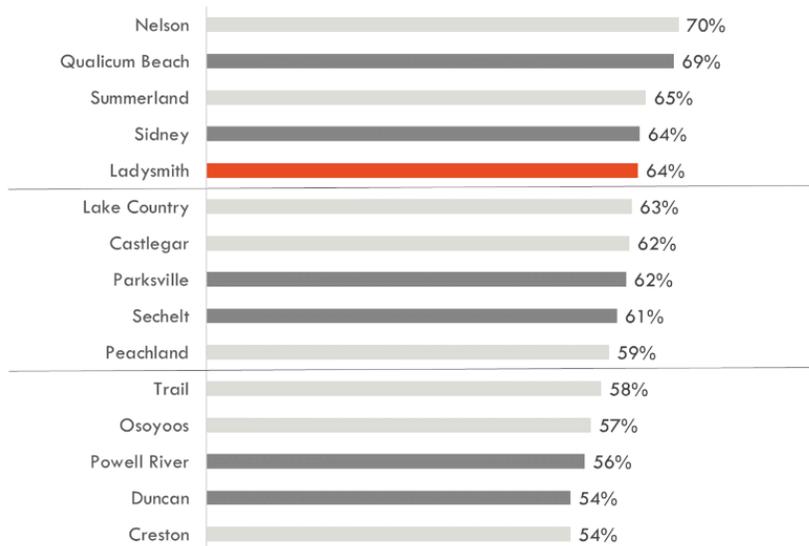
Nearly two-thirds of Ladysmith residents in the 25 to 64 age range have a post-secondary credential (including university degrees and certificates, college diplomas, and trades certificates.)

This ranks in the upper tier among similar BC communities.

Residential Property Taxes And Charges on Average Home, 2017



Any Post-Secondary Credential, Age 25 to 64, 2016



Employment in Ladysmith

Table 2 shows employment with a “usual place of work” in Ladysmith from the 2011 and 2016 Census.

Total employment declined sharply, down 17%, although there is a sense that employment has grown in the last two years since the Census.

Retail trade and accommodation and food services (which is closely tied to tourism) are the two largest locally-based employment sectors. Both sectors lost jobs between 2011 and 2016.

Manufacturing is an area of strength, with growth of 40 jobs and a location quotient (right-hand column) of nearly 1.5. This means that compared to BC, the manufacturing sector is nearly 50% larger as a share of employment. Most of these jobs are in wood manufacturing associated with Western Forest Products operations.

Table 2. Number of Employed at “Usual Place” in Ladysmith, by NAICS¹ Sector

Community	2011	2016	Growth, 2011-2016	2016 Location Quotient (to BC)
Retail trade	475	365	-23%	1.16
Accommodation and food services	460	310	-33%	1.37
Health care and social assistance	285	305	7%	1.03
Manufacturing	210	250	19%	1.48
Educational services	275	175	-36%	0.94
Public administration	155	175	13%	1.28
Agriculture, forestry, fishing and hunting	125	155	24%	2.94
Other services (except public administration)	140	135	-4%	1.16
Finance and insurance	170	120	-29%	1.14
Professional, scientific and technical services	130	105	-19%	0.50
Construction	130	55	-58%	0.57
Real estate and rental and leasing	105	55	-48%	0.97
Administrative and support, waste management and remediation services	20	55	175%	0.72
Transportation and warehousing	30	45	50%	0.43
Information and cultural industries	50	30	-40%	0.47
Arts, entertainment and recreation	55	25	-55%	0.43
Wholesale trade	35	20	-43%	0.23
Mining, quarrying, and oil and gas extraction	0	0	--	0.00
Utilities	15	0	-100%	0.00
Total	2,870	2,390	-17%	1.00

Source: Statistics Canada Census (2016) and National Household Survey (2011), custom data purchase

¹ North American Industrial Classification System. This is the standard system used by Statistics Canada and statistical authorities in the United States and Mexico to classify industries.

Total Employment for Ladysmith Area Residents

An alternative way to look at employment² is to examine the employment patterns of local residents, regardless of where they work. Table 3 shows combined employment sectors for Ladysmith as well as the nearby Stz'uminus First Nation communities and Areas G and H of the Cowichan Valley Regional District. A significant number of residents of these areas work in the Nanaimo and Duncan areas, so results are based in part on economic conditions throughout the Central Island region (and beyond).

Contrary to the trend in Ladysmith-based jobs shown in Table 2, total employment by Ladysmith and rural area residents increased by 25% from 2011 to 2016. Some of the sectors with strong growth rates, as well as higher-than-average location quotients (meaning they are larger in the local area than in BC), include health care and social assistance, manufacturing, public administration, and agriculture, forestry and fishing.

Table 3. Experienced Labour Force, Ladysmith Area (Town of Ladysmith, Chemainus and Oyster Bay Reserves, Cowichan Valley Areas G and H), by NAICS Sector

Community	2016	Growth, 2011-2016*	2016 Location Quotient (to BC)
Health care and social assistance	765	35%	1.07
Retail trade	730	14%	0.97
Manufacturing	530	38%	1.27
Construction	505	-12%	0.95
Accommodation and food services	495	19%	0.90
Public administration	440	63%	1.33
Educational services	435	30%	0.95
Professional, scientific and technical services	380	49%	0.73
Transportation and warehousing	360	11%	1.06
Other services (except public administration)	345	57%	1.16
Agriculture, forestry, fishing and hunting	340	66%	1.97
Administrative and support, waste management and remediation services	275	15%	0.95
Finance and insurance	205	-9%	0.83
Wholesale trade	160	68%	0.74
Real estate and rental and leasing	120	-11%	0.82
Arts, entertainment and recreation	105	-32%	0.68
Information and cultural industries	90	125%	0.51
Utilities	65	160%	1.97
Mining, quarrying, and oil and gas extraction	55	175%	0.80
Total	6,425	25%	1.00

* Data for 2011 for the Chemainus and Oyster Bay Reserves was suppressed by Statistics Canada, so the 2011-2016 Growth Rate includes only the change in Ladysmith and Areas G and H.

Source: Statistics Canada Census (2016) and National Household Survey (2011)

² Technically, the data is for “experienced labour force” rather than employment, which includes both the employed as well as the unemployed according to their last job within the previous 17 months.

Detailed Industry Strengths

Statistic Canada’s “detailed data set” is used to identify specific industry groups that are notable strengths for the Ladysmith economy. This data set, which includes more than 300 industry group classifications, highlights the strengths for the Ladysmith economy of specific industry groups.

The criteria to identify these comparative areas of strength include:

- Having at least 20 local jobs (with a usual place of work within municipal boundaries)
- Having a location quotient relative to BC of at least 1.5 (meaning that the industry group is at least a 50% larger share of local employment than of BC employment overall)
- The location quotient ranks either 1st or 2nd highest among the five Vancouver Island communities included in the benchmark group – Qualicum Beach, Parksville, Ladysmith, Duncan and Sidney.

Table 4 shows all industry groups with at least 20 local jobs and a location quotient of at least 1.50, along with their rank among the Vancouver Island group. Those shown in bold rank 1st on the Island, those in regular typeface rank 2nd, and those in faded grey rank lower.

Table 4. Industry Group Specialties in Ladysmith, 2016

NAICS Industry Group	2016 Employed	2016 Location Quotient (to BC)	Vancouver Island Rank (out of 5)
Full-service restaurants and limited service eating places	295	1.72	1
Sawmills and wood preservation	170	9.35	1
Logging	130	15.61	1
Grocery stores	105	1.64	4
Nursing and residential care facilities	105	2.33	5
Local, municipal and regional public administration	90	2.00	1
Health and personal care stores	65	2.02	1
Depository credit intermediation	65	1.71	2
Gasoline stations	45	5.24	1
Personal care services	45	1.53	5
Office supplies, stationery and gift stores	35	6.42	1
Newspaper, periodical, book and directory publishers	30	4.64	1
Civic and social organizations	25	4.42	1
Real estate	20	1.90	1
Specialized design services	20	1.80	2
Religious organizations	20	1.80	2

Source: Statistics Canada Census (2016), custom data purchase

Based on the indicators above, the industries that show the highest strength in Ladysmith include forestry-related industries, hospitality, retail, publishing, civic and social organizations, health-related industries and local government.

APPENDIX B: COMMUNITY CONSULTATION

The input provided by the following individuals is greatly appreciated:

- Frank Crucil, F&M Installations
- John de Leeuw, Ladysmith Credit Union
- Mark Drysdale, Ladysmith Chamber of Commerce
- Sean Dunlop, Home Hardware
- Chief John Elliott, Stz'uminus First Nation
- Guillermo Ferrero, Town of Ladysmith
- Ray Gauthier, Coast Salish Development Corporation
- Jolynn Green, Community Futures Central Island
- Kathy Holmes, Ladysmith Arts Council
- Mike Hooper, Nanaimo Airport Commission
- Tammy Leslie, Ladysmith Chamber of Commerce (and Palmer Leslie Chartered Accountants)
- Ehren Madill, Madill – The Office Company
- Jeff McKay, Oak Bay Marine Group
- Peter Richmond, 49th Parallel Grocery
- Andrea Rosato-Taylor, Ladysmith Downtown Business Association (and Ladysmith Chronicle)
- Kamal Saab, The Worldly Gourmet Kitchen
- Mayor Aaron Stone, Town of Ladysmith (and Uforik Computers)
- Amy Melmock and Janae Enns, Economic Development Cowichan (CVRD)
- Peter Watts, Microtel Inn & Suites

APPENDIX C: FUNDING PROGRAMS FOR ECONOMIC DEVELOPMENT

Links to the main economic development funding programs are listed below. Specific application criteria evolve over time and the program details should be consulted for the most up-to-date program requirements.

I. Island Coastal Economic Trust (ICET)

Economic Infrastructure and Innovation Program

<http://www.islandcoastaltrust.ca/economic-infrastructure-program>

Economic Readiness Program

<http://www.islandcoastaltrust.ca/economic-development-readiness>

II. BC Rural Dividend Program

www.gov.bc.ca/ruraldividend

III. Community Gaming Grants

www2.gov.bc.ca/assets/gov/sports-recreation-arts-and-culture/gambling/grants/guide-cgg.pdf

IV. BC Real Estate Foundation (REFBC) Grant Program:

<http://www.refbc.com/grants>

V. Tourism Funding

<https://www.destinationbc.ca/Programs/Regions-Communities-and-Sectors/Destination-BC-Co-op-Marketing-Program.aspx>