FINAL REPORT

Campbell River & North Island Labour Market Project

Regional & Sector Talent Challenges & Solutions

WHERE TALENT MEETS OPPORTUNITY

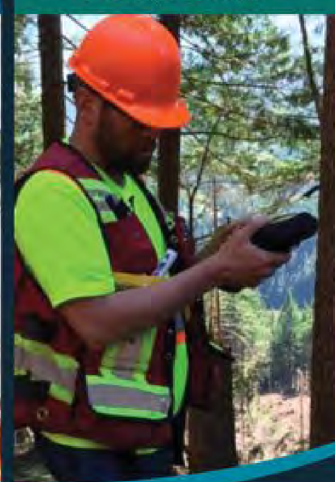
Campbell River & North Island Labour Market Partnership Project

HEALTHCARE

AQUACULTURE

TOURISM

FORESTRY



Submitted by:
Human Capital Strategies

January, 2024

Submitted to:
The City of Campbell River and its partners, the Regional District of Mount Waddington & the Strathcona Regional District

This program is funded by the Government of Canada and the Province of British Columbia.

ACKNOWLEDGEMENTS

We acknowledge we are visitors on the traditional territories of the many First Nations in the Mount Waddington and Strathcona Regional districts. We wish to recognize each of these communities as well as other First Nations and Indigenous peoples living in these territories.

On November 1, 2022, the City of Campbell River, Regional District of Mount Waddington and Strathcona Regional District launched a Labour Market Partnership to conduct a labour market study of Campbell River and the North Island and to prepare a strategy to address priority needs.

Over the course of this project, labour market challenges remain a pressing, ongoing concern in urban and rural and remote communities in Campbell River and Vancouver Island North, where the economic landscape is shifting rapidly due to factors such as policy and regulatory changes, evolving economic drivers and global events. This is placing additional pressure on regional labour markets and impacting businesses.

This Project aimed to update existing data, to improve the understanding of labour market issues, trends and opportunities and to support the development of action plans. We retained Human Capital Strategies (HCS) to undertake comprehensive secondary and primary research, a robust engagement process and the development of a Labour Market Report and a set of recommendations for solutions to be acted upon to address the region's talent challenges.

This report is a summary of the project findings and recommendations for action and implementation of talent solutions. Over the course of the last 12 months over 750 individuals and organizations have participated in the research and engagement.

We would l like to recognize and thank all these community members for their contribution to this work and the talent solutions we subsequently implement. We would also like to recognize and thank the Project Steering Committee and the Healthcare Subcommittee; both created to oversee and provide invaluable input on the project. Members of both groups are listed at the end of this report.

We hope that this report, when its recommendations are implemented, will indeed bring life to our project slogan: "Where Talent Meets Opportunity!"

Sincerely,

Rose Klukas, Director, Economic Development & Indigenous Relations, City of Campbell River
Jackie Challis, Economic Development Officer, Regional District of Mount Waddington
Renée LaBoucane, Manager, Strategic Initiatives, Strathcona Regional District

In Partnership with

This program is funded by the Government of Canada and the Province of British Columbia.

TABLE OF CONTENTS

1. INTRODUCTION, PURPOSE & BACKGROUND

The City of Campbell River partnered with the Regional District of Mount Waddington (RDMW), and the Strathcona Regional District (SRD) for a Labour Market Partnership project. Funding for this project is being provided by the Government of Canada and the Province of British Columbia, through WorkBC's Community and Employer Partnerships fund. The project partners are also contributing funds towards the project.

The economic landscape of both Campbell River, the SRD and the RDMW (the "Partners") is changing rapidly due to policy and regulatory changes, evolving economic drivers, shifting public values, and global events like the COVID-19 pandemic. Regional forest and aquaculture industries are particularly affected (with spin-off impacts on other regional sectors, such as health and wellness, and tourism), making attraction and retention efforts difficult.

In response, the Partners worked to develop a labour market study to update existing data, improve stakeholder understanding of the issues, and help create action plans. The Partners have formed this Labour Market Partnership because:

- The regions' economies are linked;
- Recent events have impacted industries in both regions.
- The regions have been similarly impacted by recent developments.
- The regions' communities can work together to explore opportunities and strategies to diversity our economies.

The Partners retained Human Capital Strategies (HCS) to implement the project terms of reference and work plan. A Steering Committee was convened for this project and its members represent diverse industries, different levels of government, organizations and interests. They have actively participated in the project, guided decision-making, and facilitated cross-community collaboration. A Healthcare Subcommittee was also created to provide insights and recommendations to the project consultant regarding talent challenges and solutions in this key sector.

Objectives & Scope

The objectives for this project include improving understanding of regional labour markets (including immediate needs and issues) so that resources can be directed to the right areas to facilitate growth and development; assisting with the development of strategies to deal with regional labour market issues and improve recruitment and retention. The other objective was understanding challenges and opportunities of the North Island in the 4 main sectors (aquaculture, forestry, healthcare and tourism), improve understanding, develop action plans, making the market more inclusive and encouraging economic diversification.

A Healthcare Toolkit was initially a project objective, however, based on sector input, the project was amended to exclude this.

Key main project activities were:

1. Conducting research and compile data to obtain a greater understanding of the challenges and opportunities facing Campbell River's, SRD's and RDMW's labour markets, particularly the regional aquaculture, forestry, tourism, and health and wellness sectors.
2. Completing a labour market study, including production of a report with information that will be useful for advancing recovery and resiliency plans, strategizing ways to make labour markets more inclusive, and encouraging economic diversification in Campbell River, SRD and RDMW. The report and research findings will be used to update existing data, improve stakeholder understanding of the issues, and help develop action plans.
3. Holding a Campbell River and North Island Medical and Healthcare Career Expo to promote the sharing of information and best practices and facilitate networking among healthcare

stakeholders, employers, recruiters, First Nations, jobseekers, governments and community leaders on attracting and recruiting and retaining healthcare talent.

This labour market report will contribute to a greater understanding of challenges and opportunities facing Campbell River, SRD and RDMW's labour markets, particularly the regional aquaculture, forestry, tourism, and health and wellness sectors.

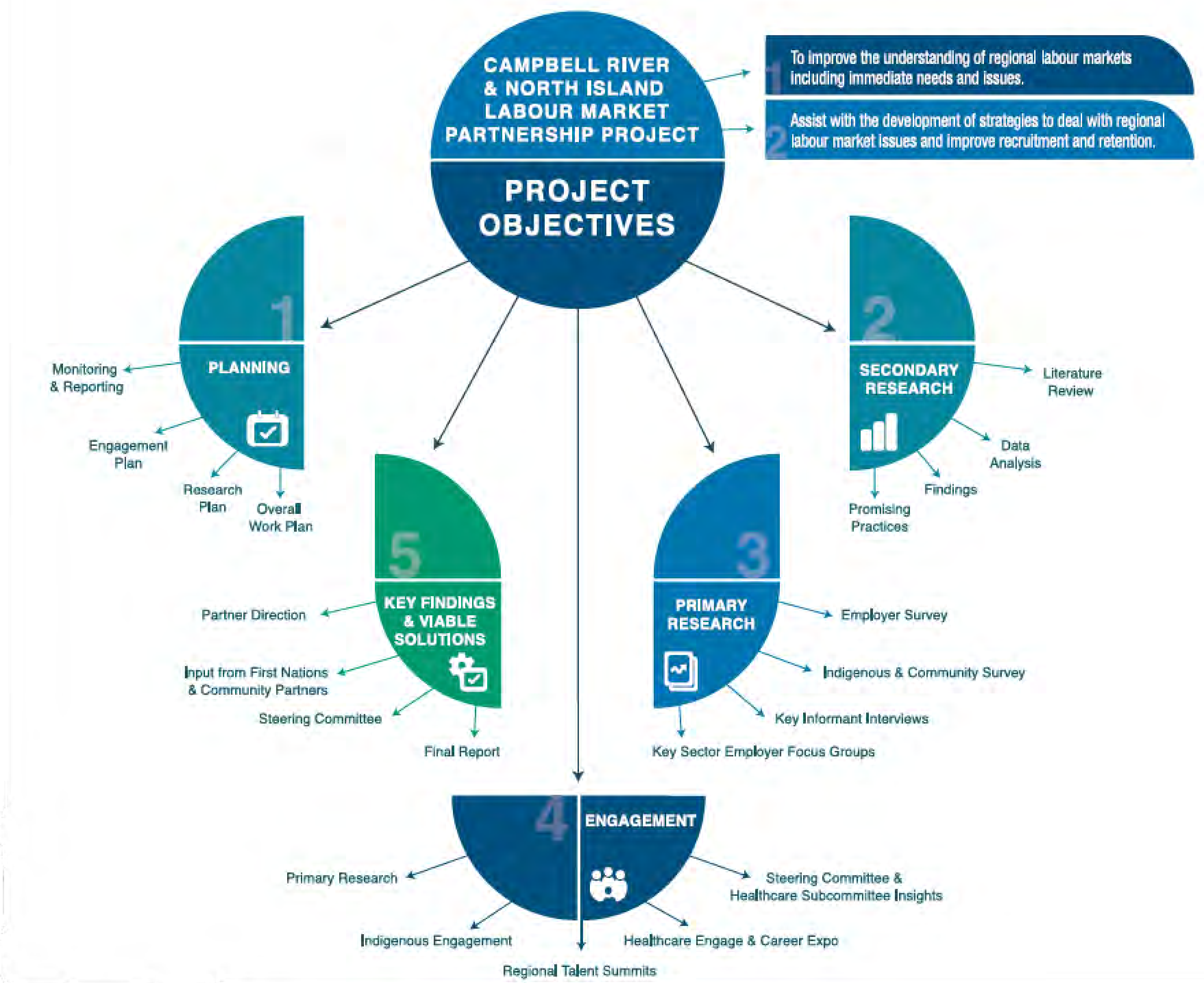
This is a complex project in which study area for this Labour Market Partnership project encompasses a wide geographic area; it includes both rural and urban areas. It included engagement with individuals from 37 Indigenous and non-Indigenous communities throughout the study area, as well as consultations with a diversity of Indigenous organizations, employers, employees and jobseekers, industry groups and all levels of governments.

The next section clearly lays out the project activities, namely, secondary research, primary research and engagement.

2. PROJECT PROCESS & METHODOLOGY

This project and its findings and recommendations are based on a rich and comprehensive base of research and engagement involving the participation of approximately 750 individuals and organizations, almost totally located in the study regions.

Each part of the "workforce development ecosystem" was extensively engaged with and many engagement discussions were designed to combine representatives of the parts to encourage a collaborative and integrative approach to talent solutions.



Each part of the research methodology informed the next part, starting with a comprehensive scan and analysis of existing literature and data. The above illustrates the specific research and engagement steps.

Secondary Research

A comprehensive secondary research approach identified key research questions and topics for use in the development of a survey instrument for an online survey of employers, employees and jobseekers and community members, including Indigenous individuals and organizations. It also culminated in an extensive annotated bibliography available in the longer version of this report.

Online Survey

Invitations to complete the survey were emailed to employers and business and industry umbrella groups, First Nations and Indigenous organizations, employees and job seekers. An online questionnaire focused on workforce-related challenges, best practices and potential solutions, and was open from March 24, 2023 through May 12, 2023. Respondents included the following:

- 97 (29%) in the “employers / self-employed” category.
- 178 (54%) in the “employees / jobseekers” category.
- 56 (17%) in the “a community member – not an employer or employee/jobseeker – with a keen interest in workforce attraction” category.
- This included 29 employers or self-employed who identified as Indigenous and 27 employees or jobseekers who identified as Indigenous.

Focus Groups

In April 2023, 7 focus groups were held in Port McNeill and Campbell River in the aquaculture, forestry, healthcare and tourism sectors in the study regions, involving the participation of almost 80 industry stakeholders and First Nations. The methodology was based on a qualitative approach to exploring workforce challenges and opportunities, specifically attraction, recruitment, retention, and training and development with the regions.

Key Informant Interviews

After the survey and focus groups, the project research included 43 interviews conducted with key representatives of 8 sectors in May through June 2023 to probe into key challenges and potential solutions:

- Five industry sectors (Aquaculture, Forest, Healthcare, Tourism and other sectors).
- Municipal, Provincial and Federal public servants/ministries.
- First Nations and other Indigenous organizations.
- Education, Training and Employment service providers.

Talent Summits

Regional Talent Summits were held in Campbell River and Port Hardy on October 17th, 2023, and provided useful input on potential solutions from almost 70 people/organizations. Each Summit sector panel of four representatives and a moderator involved insightful presentations on talent solutions and led to much interaction among panelists and Summit participants. Also, the project results on possible talent solutions were presented and participants provided input there and after via a Talent Solution comment/rating form. Outputs from the Summits are included in the Findings section of this report.

A virtual Campbell River and North Island Medical and Healthcare Career Expo was held on November 22nd, 2023, involving over 70 participants.

Findings from the Expo are included later in this report.

Indigenous Engagement

This Project involved extensive research and engagement involving several Indigenous organizations and individuals. This included the following:

- Online Survey: 56 employers, self-employed individuals, employees and jobseekers self-identified as Indigenous – 17% of 331 survey respondents.
- Sector focus groups: 14 Indigenous organizations participated in the 7 focus groups in Port McNeill and Campbell River.
- Key informant interviews: 10 interviews were conducted with representatives of Indigenous organizations and who self-identified as Indigenous.
- Regional Talent Summits: 14 Indigenous organizations participated in two Summits in Campbell River and Port Hardy – each Summit included a traditional welcome and acknowledgement by Indigenous leaders and Elders.
- Direct communication: Direct emails and telephone calls were made to over 40 First Nation and Indigenous organizations to invite them to participate in engagement and research and to contact the consultant with any questions or input on talent challenges and solutions.

- A virtual Medical and Healthcare Career Expo included a traditional welcome by an Indigenous moderator and an Indigenous Healthcare panel on attraction and recruitment which was totally composed of and moderated by Indigenous people.
- The consultant engaged with several Indigenous representatives at two RDMW North Island Regional Economic Forums in Port McNeill on April 5-6 and November 14-15 of this year.

The importance of having a comprehensive Indigenous engagement plan from the beginning of this project translated to the commitment to honouring the Truth and Reconciliation Commission Calls to Action (TRC) and the United Nations Declaration on the Rights of Indigenous People (UNDRIP).

Encouraging innovative solutions for communications and engagement is a necessity and best practice for successful community trust and fulsome participation by key leaders. First Nations are growing exponentially and the need for robust datasets reflecting their point of view in research is critical with data sovereignty. A focus on urban and remote communities at macro and micro levels is vital for truly reflective and substantive core data results.

The project consultant engaged with almost 40 First Nations and Indigenous organizations in implementation of a project Indigenous engagement plan; including 16 First Nations, 8 Tribal Councils, a Treaty Nation and several other entities in the project regions. Key to implementing this Plan was retaining a capable Indigenous partner in James Delorme, former Chief of Klahoose First Nation and a trained person with Cultural Safety and Humility.

3. FINDINGS OF THE SECONDARY RESEARCH: WHAT WE HEARD & FOUND

Overview

The findings of this project are based on extensive secondary research, primary research and other engagement outlined in the previous section.

The research began with detailed scanning and analysis of existing literature and data on labour market and related issues for this geographic area. Some studies were included from other locations (both on and off Vancouver Island) where it was felt they could add value. An extensive annotated bibliography is included at the end of this report.

Unexpected events like a pandemic, changing economic conditions like a recession or a boom and new government policies such as the BC government's *StrongerBC: Future Ready Action Plan* can impact the relevance and effectiveness of strategies that have been based on information that has become out of date. Information about the economies and labour market needs to be kept up todate and systems and resources should be in place to ensure this.

Information on current and future labour market trends shows that the demand for labour will continue to exceed supply across occupations, industries and geographic areas. This historically unusual condition in the labour market means that attracting workers has become very competitive requiring increasing amounts of positive action. It must also be recognized that information on current and future labour market trends shows that the demand for labour will continue to exceed supply and will be competing with other regions for the same human resources.

Many strategies and examples of best practices have been put forward on how to attract healthcare talent. These include:

- Helping students and Indigenous people obtain the training they need to pursue meaningful careers in high-demand jobs.
- Expanding business partnerships with and among First Nations must continue to increase healthcare talent in the regions - we heard that while some have been created, they have not been effectively implemented.
- First Nations are developing a growing presence in the economy of the region, often in fields like tourism and aquaculture that are central to this report.

- Employers need to continue to pursue respectful and effective relations with Indigenous nations - government to government, business to business, employer to employee and person to person – for the mutual advantage of all who live in the region.
- Some issues are especially complex because many organizations and levels of government must be involved.
- Housing, childcare and community services are three such key areas to be addressed to increase talent availability and retention. These services must be available, accessible and competitive with other regions both to attract and to retain population.
- Solutions are needed which are specific, region/sector targeted, action-oriented and within the realm of influence by regional/local governments and industry.

Analysis of relevant literature and primary research identified key talent barriers. Skills shortages continue in significant numbers across both high-skilled and lower-skilled positions due to the following factors:

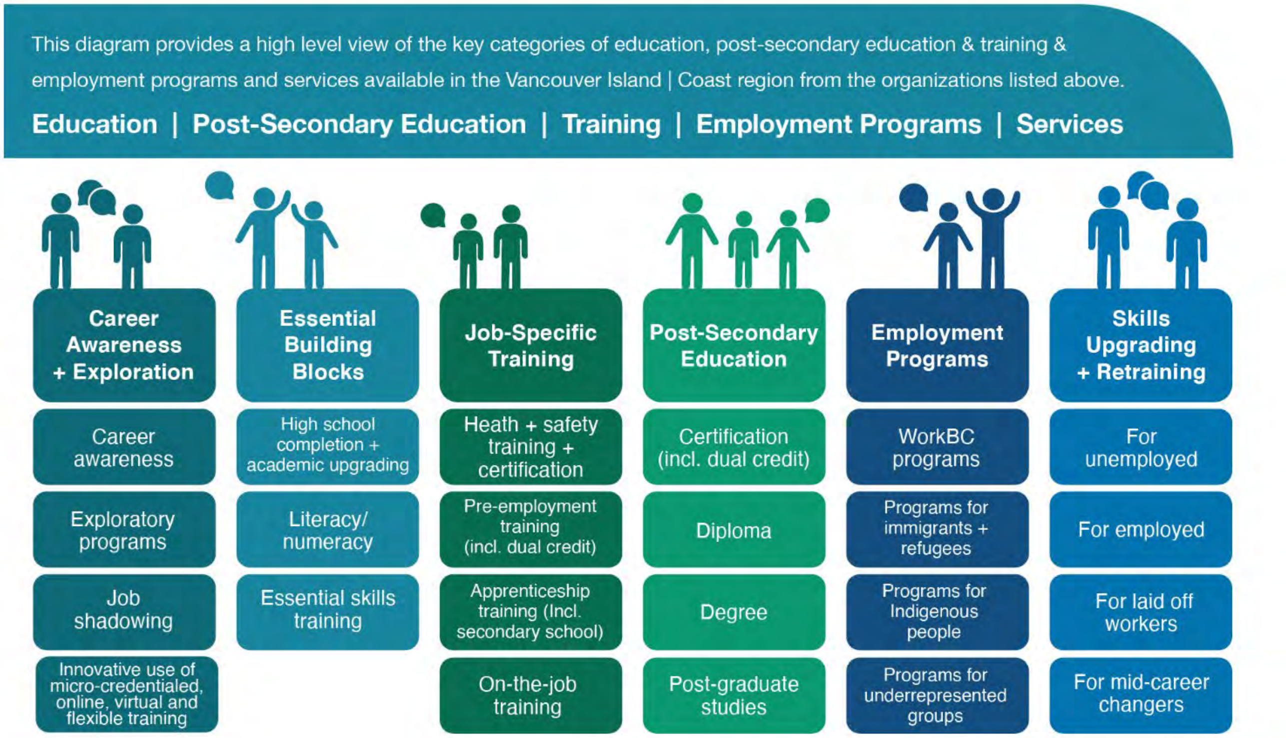
1. Employees expect more than employers are providing regarding wages, flexible working hours, working conditions and locations.
2. Sufficient local training is not available forcing people to leave their community for training.
3. Employers in some sectors lack connections to secondary schools and find it difficult to provide industry career information to students and teachers.
4. Lack of transportation to, from and within the area limits access to training and jobs.
5. Lack of electronic connectivity deters workers, hampers business and impacts business talent recruitment and growth.
6. Future of aquaculture and forestry decreases workers’ attraction to these sectors.
7. The lack of suitable and affordable housing discourages migration from outside the region.

This diagram provides a high level view of the key categories of education, post-secondary education & training & employment programs and services available in the Vancouver Island Coast region from the organizations listed above.

From the research and engagement, some general themes emerged. These included an emphasis around the need for better communication with governments, with educational institutions, with potential workers, and with students and those outside the area.

Improving the overall economic and social environment is also important. This includes transportation, electronic connectivity, housing and childcare. These themes were enforced by our primary research.

See Best Practices and Lessons Learned later in this section.



It will be important for education, training and employment program providers to work closely with employers and industry groups, employees and jobseekers, First Nations and other communities and private and public funders to offer a responsive and work-based array of programs in the regions in coordinated, collaborative and results-oriented ways. This will need to include the innovative use of online, micro-credentialed and community-based training.

Nurturing a Regional Workforce Development Ecosystem

A key finding in the Project research and engagement is the importance of key players in the region working together in a collaborative and coordinated way. One of our broad and important recommendations for addressing talent priorities is to consider nurturing a true and really effective 'workforce development ecosystem.'

A workforce development ecosystem, in the context of this Project, is a regional structure that encompasses entities from within the region and beyond, who each attempt to create value for their organizations, clients and the region (in this case, workforce development outcomes). Within this ecosystem, the entities work toward individual and collective goals with interdependencies and complementarities among themselves.

Key to this ecosystem are: 1) major providers of programs and services (e.g., North Island Employment Foundations Society [NIEFS], North Island College, North Vancouver Island Aboriginal Training Society, WorkBC, etc.); and 2) organizations with community and regional mandates for jointly planning workforce development programs (e.g., Campbell River Learning Council, Vancouver Island North Training & Attraction Society, etc.).

As one recent report emphasized in a report on such ecosystems, “Collaboration is a requirement.” It goes on to state:

> *“Collaboration is a requirement —What might be the main problem with the current workforce development ecosystem? In a word: isolation. For example, there may be an unhealthy separation between those who educate and train individuals and those who hire them. There are gaps between government agencies that fund various training programs and those being trained. Too often, the ecosystem participants may operate in silos depending on their roles. Business groups gather to discuss business, policymakers talk to other policymakers, and educators gather with educators. This isolation leads to slow adaptation of company programs, harming both individuals and employers.”*[1]

Here, we present the literature review and synthesize the information therein. Secondary Research & Quantitative Analysis Key Tasks include (as per Project Terms of Reference):

- A comprehensive literature review of labour market trends and changes .
- "Deep Dives" into regional tourism, forestry, aquaculture, and health care.
- Key indicators and statistics for each region including 10 year projections.
- Forecast of employment trends "jobs of the future" and related skills training needs
- Current and future challenges and opportunities for regional labour markets
- Employment and workforce barriers identification
- Opportunities to support increased inclusivity and accessibility in the labour market
- Opportunities to encourage and increase workforce participation rates

This *Secondary Research and Quantitative Analysis* report is the result of a comprehensive literature review of reports and studies conducted over the past 15 years pertaining to labour market research and workforce development strategies in key sectors, and in different geographic areas including the City of Campbell River, the Strathcona Regional District, and the Regional District of Mount Waddington. The report also includes the HCS team’s modelling work to derive sectoral employment opportunities over a 10-year period, and it includes a summary of the “lessons learned” and recommendations on how the research findings in this report can contribute to primary research and the overall labour market study.

[1] Deloitte. *The ABCs of a Thriving Workforce Development Ecosystem*. August 28, 2023. Retrieved at https//:action.deloitte.com/insight.

Secondary Research Approach

We review related literature and statistical data to understand the quantitative aspects of the sectors, and the key issues and ideas from previous studies. The outcome of the literature and statistical data review guided the primary research. The HCS Team has formulated a list of research questions noted below:

1. What is the composition of labour market in the City of Campbell River, RDMW, and SRD? What percentage of local employment does each industry/sector make up?
2. Where is the largest employment-gaps, now and projected in each of the study area? Which industries/sectors are most in need of human capital, and which will be most affected in the future?
3. What are the recent growth patterns and what are the gaps in the four sectors in each of the study regions?
4. Are there any major projects starting / projected to be starting in the study area? How do these projects affect labour requirement in the four sectors that are the focus of this study?
5. What specific occupations are and will be most in demand? How can employers in the City, RDMW and SRD fill these positions?
6. What is population growth and mobility like in each of the study areas? What is the age composition of the population there and how does it differ from the provincial pattern?
7. Which components of the population (age, gender, and / or migration) are projected to experience higher than average growth in the next ten years? What are the implications on local labour force participation?
8. Persons with Indigenous identity account for a higher than provincial average share of population in each of the study areas. What is their age distribution, labour force participation, and educational attainment.? What specific implications can we draw from this? How will the broader provincial and national economy impact this region in the next the years.

The research process reviewed relevant academic literature and government reports. Statistical data was collected from sources such as Statistics Canada, Census Canada, the Labour Force Surveys, BC Stats, and national and provincial industry and sector associations and team occupational and industry labour demand and supply projections for the Province of B.C., and the Vancouver Island/Coast Region.

Examples of secondary data sources include industry profiles, and data for employment and unemployment, income, and other socio-economic characteristics of the workforce.

For labour market information and population estimates and projections, since we are providing labour market information and analysis for a small urban centre and surrounding regional districts, data from Censuses is the most useful.

An example of Census data is employment answering questions like how many people work in forestry, or aquaculture? How many hours in a week do they work? How much do workers earn for full-time full-year work? How many people work as nurses? Food and beverage servers? Outdoor activity guides? Census data is a key component in developing the various 10 year projections. All sources are noted in the appended annotated bibliography.

3.1 Scan of BC, Vancouver Island and Regional Districts (Mount Waddington Regional District and Strathcona Regional District (including Campbell River)

This section of the report provides information and data that we have reviewed on economic conditions and population growth. We start from the broad province-wide description, before narrowing down to the Vancouver Island / Coast Development Region, and further refined geographic areas (the study region).

3.1.1 PROVINCIAL ECONOMY

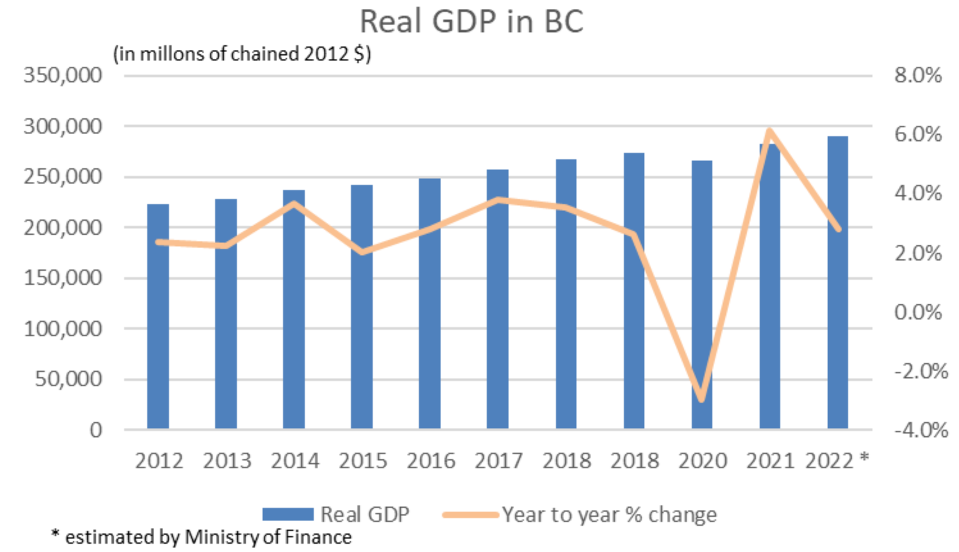
PAST AND FUTURE PROVINCIAL GROSS DOMESTIC PRODUCT

The BC economy showed resiliency in 2022 despite challenges from the pandemic, war in Ukraine, rising inflation and interest rates, and climate change. As per Figure 1 on the next page, the Ministry of Finance estimated that real Gross Domestic Product (GDP) in the province likely grew by 2.8% in 2022, following a 6.1% increase in 2021.[2] Real GDP growth in BC was amongst the strongest in Canada.

Nevertheless, BC economy is faced with considerable uncertainty given factors like wars, weather events, game changing technical discoveries (AI) and rising inflation and interest rates. However, growth of the provincial economy is likely to stay positive.

[2] Ministry of Finance. (2023). Budget and Fiscal Plan 2023/24 – 2025/26. Government of British Columbia.

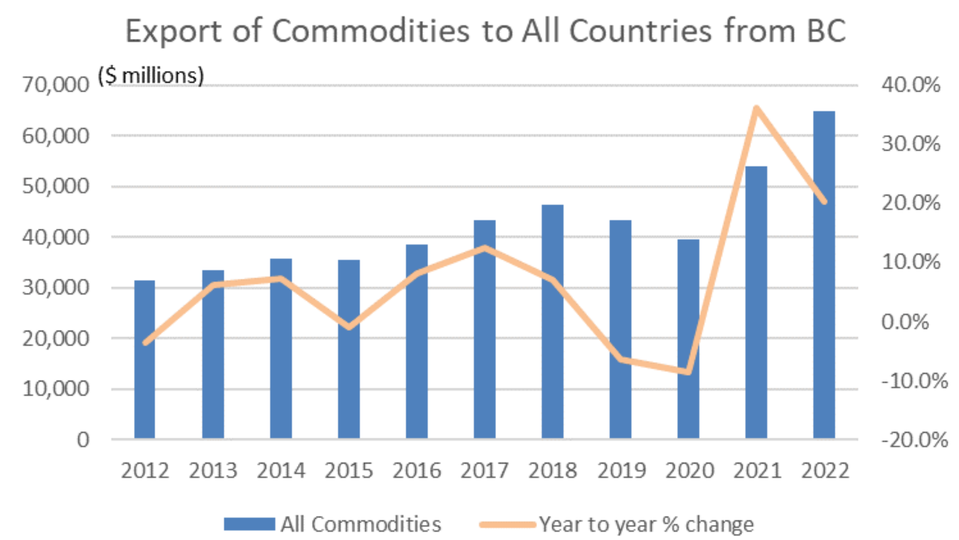
Figure 1 – BC's Real GDP and Annual Growth, 2012 to 2022



Source: BC Stats; Budget 2023

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 2 – BC's Export of Commodities to All Countries, 2012 to 2022



Source: BC Stats

Exports from BC have been increasing from $31.848 billion in 2012 to $64.388 billion last year (Figure 2, above). The United States is our biggest customer, and their share is rising. China is the second largest, but their share has been falling. In a recent report, the Business Council of BC notes the importance of exports to the BC economy, presenting current export data and projecting it into the future.[3] They see forestry related exports declining and aquaculture facing challenges, although resource exports from BC in total are expected to remain strong. Tourism is only slowly recovering from the pandemic.

The BC Government's *2019-2020 Economic Plan* describes the provincial government's pathway to a better British Columbia.[4] Investments need to be made in transportation, energy and other infrastructure. Investment also needs to be made in our human capital by attracting people and by upgrading the labour force. The role of Indigenous people needs to be enhanced. All this will result in a more competitive business climate and better living conditions including more affordable housing. Although the report does not deal specifically with North Vancouver Island, it does cover the forest industry, noting that it could decline unless steps are taken like improving productivity and making better use of technology. Moving into more advanced manufactured wood products will support the sector.

Aquaculture is also mentioned noting the role of the Indigenous people in this sector and the potential for conflict between aquaculture and those fishing for wild salmon.

In the Ministry of Finance forecasts economic growth will slow to 0.4% in 2023 before rising to 1.5% in 2024.[5] The slower near-term growth projection largely reflects the combined effects of elevated price pressures and tighter monetary policy working their way through the economy. In addition, economic weakness among B.C.'s major trading partners could weigh on export demand. As these factors subside, economic growth is expected to strengthen, supported by steady employment growth, solid investment activity, and higher international migration. Over the medium-term (2025 to 2027), real GDP growth is expected to range between 2.2% and 2.4% annually.

Forecasts of other macro-economic variables that impact the performance of the provincial GDP are shown in Table 1. One of the major contributors to economic activities is population growth, which is described below in Figure 3.

[3] Peacock, K. & Finlayson, J. (2023). The Foundations of Provincial Prosperity: A Review of What B.C. Exports to the World …. Today and In the Future. Business Council of British Columbia.

[4] Government of British Columbia. (2020). 2019-2020 Economic Plan: A Framework for Improving British Columbians' Standard of Living.

[5] Ministry of Finance. (2023). Budget and Fiscal Plan 2023/24 – 2025/26.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Table 1 Forecasts of Key Macroeconomic Variables, B.C. (2023-2027)

	2022	2023	2024	2025	2026	2027
Real GDP (chained 2012 $ billions)	290.0 *	291.2	295.7	302.8	309.8	316.5
(% change)	2.8	0.4	1.5	2.4	2.3	2.2
Retail sales ($ millions)	101,570 *	103,362	106,320	109,909	113,789	117,810
(% change)	3.0	1.8	2.9	3.4	3.5	3.5
Housing starts (units)	46,721	39,033	37,037	38,033	38,034	38,034
(% change)	-1.9	-16.5	-5.1	2.7	0.0	0.0
Consumer Price Index	145.5	151.1	154.9	158.3	161.5	164.7
(% change)	6.9	3.9	2.5	2.2	2.0	2.0

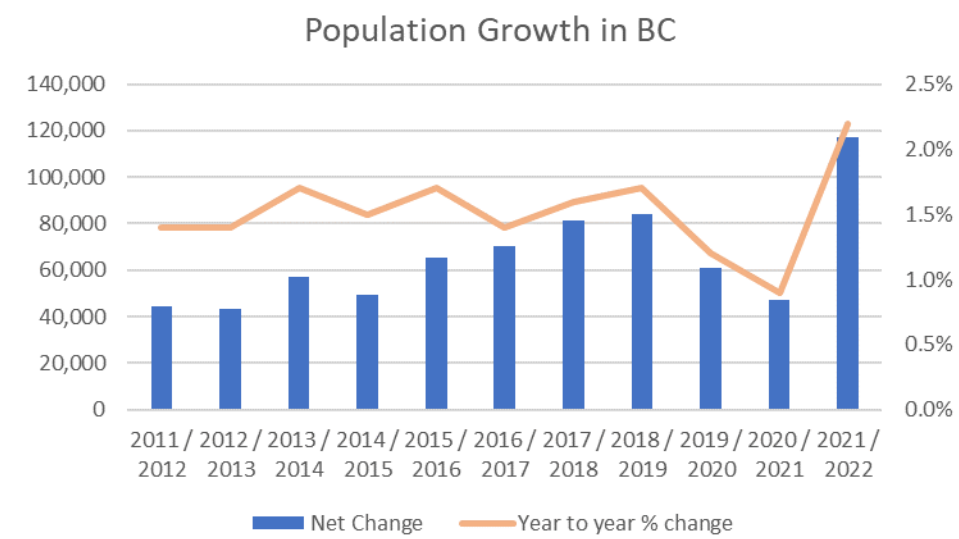
Source: Budget 2023.
** Values in 2022 estimated by Ministry of Finance*

PAST AND FUTURE PROVINCIAL POPULATION

BC's positive prospects are causing people to vote with their feet and come here. Population grew by over 7% between 2016 and 2021 to surpass 5 million with most of the growth occurring outside the metro regions. Nanaimo had one the largest population increases.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 3 – Net Changes in Population in BC, 2011/12 to 2021/22



Source: Statistics Canada. Table 17-10-0140-01; BC Stats

Over the past decade (from 2011 to 2021), population grew at an average rate of 1.5% per year. In the average annual increase of population of 65,000 to the province, new immigrants account for almost 45,000. From July 1st, 2021 to June 30th, 2022, BC welcomed a record almost 104,000 immigrants to the province.

In the next 10 years, population in BC is projected to grow at a slightly slower pace than the previous 10 years, at 1.4% per year. The aging of the population is continuing although at a slower pace, while the growth of the working age population is slower than the previous decade. The population aged 65 and plus are growing on average 3.1% per year the next 10 years, compared with the 4.1% annual rate the previous 10 years. The working age population grew at a rate of 1.09% per year the past 10 years, but is projected to grow at 1.07% per year during the next 10. The youth population (0-24 years old) is projected to grow on average 0.8% per year in the future 10 years, more than double the growth rate of 0.4% per year in the past.

The Province's Budget and Fiscal Plan 2023/24 to 2025/26 presents a more elevated population outlook, projecting the provincial population to increase by 2.4% in 2023, 1.9% in 2024, and then by 1.6% on average over the 2025 to 2027 period.[6] It forecasts that total net migration is to reach about 109,400 persons in 2023, and 90,700 persons in 2024, supported by strong international migration, with a smaller interprovincial contribution. Total net migration is projected to average around 88,800 persons annually in the 2025 to 2027 period. (By comparison, average net migration to the province from 2016 to 2021 was 73,500 persons per year). International migrants are expected to account for over 85% of total migrants over the forecast horizon. This represents a larger share compared to recent years, reflecting increases to federal immigration targets announced in the fall of 2022.[7]
In summary, the section shows that BC had strong population growth over the past decade and is projected to continue this growth over the next 10 years. If the federal immigration targets are attained, they should present a positive impact and opportunities for labour force growth.

Throughout this report, we will present statistics and analysis pertaining to the Indigenous population when data is available. In the following subsection we present population estimates for the Indigenous population living in the province.

POPULATION OF INDIGENOUS IDENTITY IN BC

A focus of this report is to determine the sources of an adequate labour supply for MWRD, and SRD including Campbell River. Many of the needed workers will come from outside the region. However, within the region there is an important potential source of talent that has often been overlooked in the past. We now turn to the Indigenous population of BC, a subgroup that is not only growing faster than the population, but also has a higher percentage in the working age groups.

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[6] Ministry of Finance. (2023). Budget and Fiscal Plan 2023/24 – 2025/26.
[7] Ministry of Finance. (2023). Budget and Fiscal Plan 2023/24 – 2025/26.

In September 2022, Statistics Canada released new information on Indigenous people living in BC and Canada from the 2021 Census. The 2021 Census counted 290,210 Indigenous people of all ages living in BC, up 7.3% from 2016 and accounting for 5.9% of the total population in British Columbia. Of the 290,210, the Census counted 220,135 who were 15 years of age or older, with just under one in five (41,535) living on reserve.[8]

The core working-age (25 to 54) Indigenous population continues to grow but is slowing. The 2021 Census shows that the number of on and off reserve Indigenous people aged 25 to 54 increased by 6.8% from 2016 to 2021, which matched the growth rate of the non-Indigenous population in this age group over the same period. Of the working-age population, the Census counted 93,215 Indigenous people living off reserve and 19,785 living on reserve.

Contrary to earlier expectations, the young Indigenous population (age 0 to 24) did not grow at all between 2016 and 2021, in fact, this age group declined by 0.2% over the period. On the other hand, the Indigenous seniors group population (age 65 and over) increased 38.8% from 2016 to 2021, much faster than the growth rate of the non-Indigenous population in this age group (20.8%).

PAST AND FUTURE EMPLOYMENT

Employment has been rising steadily. Over one position in five remains unfilled due to labour shortages even though wages for these unfilled jobs has risen from an average of $24.00 per hour to $26.55 by the end of last year (2022). This compares to $33.16 for all positions, a rate that is also rising. The unemployment rate at 5% remains close to a record low.[9]

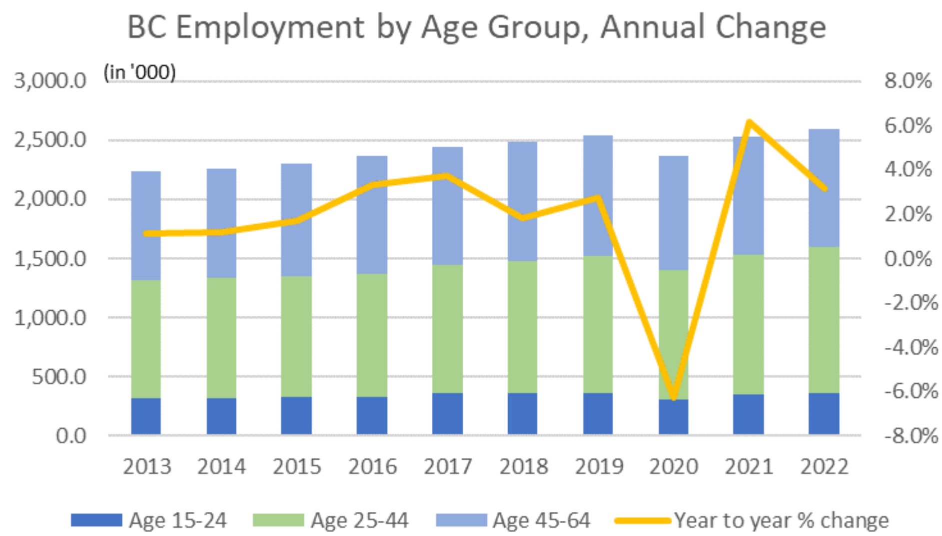
Employment in the province has been steadily growing at an average rate of 1.9% per year during the period shown in Figure 4. By age group, employment of those in the 25-44 years old age group grew the fastest, at 2.4% per year, while employment in the 45-64 years old age group grew the slowest, at 0.9% per year.

Labour force participation rates have barely changed, from 65.0% in 2013 to 65.1% in 2022. Within age groups, youth (15 to 24 years of age) labour force participation has made the most gain, from 63.3% in 2013 to 66.9% in 2022. Labour force participation of those in the 25 to 44 years age group and those aged 45 to 64 years has also been trending upward (from 86.0% to 88.7%, and from 74.2% to 76.1%, respectively).

[8] Data from Statistics Canada's Table 98-10-0266-01 Indigenous identity by Registered or Treaty Indian status: Canada, provinces and territories, census divisions and census subdivisions from 2021 Census, and Aboriginal Population Profile for Canada, Provinces and Territories, Census Divisions and Census Subdivisions, 2016 Census.

[9] Finlayson, J. of the Business Council of British Columbia's post on March 24, 2023: "B.C. labour market remains tight…and vacancies continue to abound".

Figure 4 – Employment in BC, 2013 to 2022



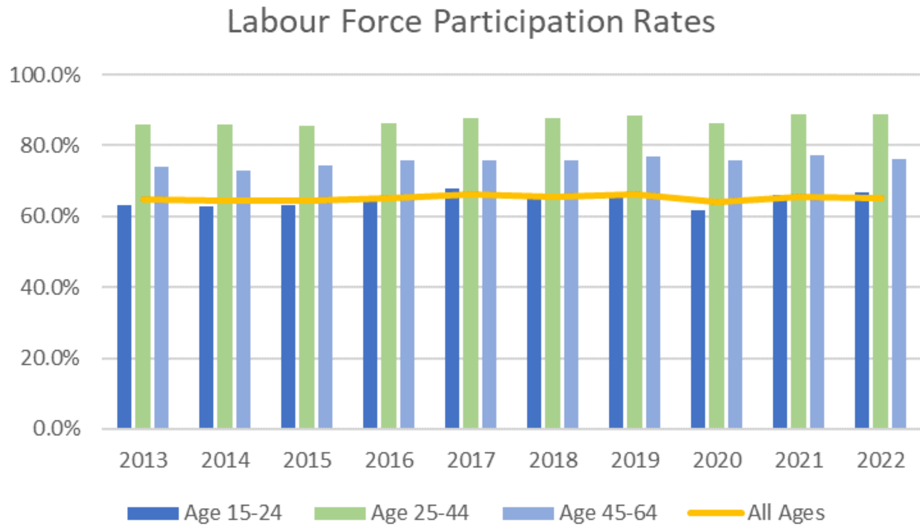
Source: Statistics Canada. Labour Force Survey

Unemployment rates have been trending downward, from 6.6% in 2013 to 4.6% in 2022. All age groups have experienced similar rates of reduction in unemployment. The overall labour market performance has been positive and encouraging.

The pandemic due to Covid-19 did cause havoc throughout the economy, as can be seen from these three charts – employment shrank by 6.3% in 2020, labour force participation rate (Figure 5) dipped slightly to 64.2% from 66.3% the year before, and unemployment rate shot up to 9.1% in 2020 (Figure 6 on next page). With the ease of restrictions, the overall labour market has rebounded, with employment surpassing the pre-Covid level by 2022.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

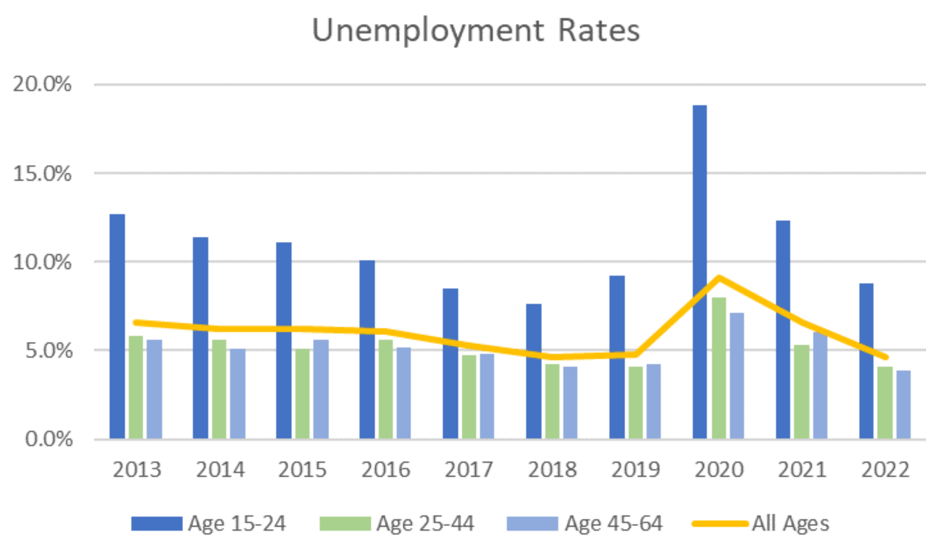
Figure 5 – Labour Force Participation Rated by Age, BC, 2013 to 2022



Source: Statistics Canada. Labour Force Survey

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 6 – Unemployment Rates by Age, BC, 2013 to 2022



Source: Statistics Canada. Labour Force Survey

There is, however, unevenness among employment growth in different industries over this 10-year period. Employment in both the goods-producing sector and the service-producing sector has grown, but the latter grew twice as much.

Within the goods-producing sector, agriculture, forestry and logging with support services, and mining and oil and gas extraction industries all experienced employment decline. It should be noted, though, that not all employment reduction was reflective of lack of demand, but a sign of lack of labour supply. Within the services-producing sector, those industries that saw their employment grew substantially include non-store retailers (up 138%), couriers and messengers (up 149%), computer system design services (up 124%), advertising (up 127%), motion picture and sound recording industry (up 129%), heritage institutions (up 79%), and nursing and residential care facilities (up 50%) as well as social assistance services (also up 50%). Some tourism related industries have experienced employment decline – in air transportation (down almost 20%), travelling services (down 15%), and in accommodation services (down 26%), over the 10-year period.

3.1.2 VANCOUVER ISLAND COAST DEVELOPMENT REGION ECONOMY

The province of British Columbia is made up of many smaller geographic regions, with different population density and economic structure. For administrative and planning purposes, the Province set up regional districts, and several regional districts make up a Development Region. Statistics Canada also utilizes the geographic boundaries of these “regions” for collection and dispensing statistical data (called “Census boundaries”).

In most cases, the regional, detailed data describing economic activities in a time series is the data for a Development Region. In BC there are eight Development Regions. Vancouver Island / Coast Development Region is made up of nine regional districts – Strathcona Regional District and Regional District of Mt. Waddington being two of the nine. Statistical data for Regional Districts (called “Census Divisions” in the Census terminology) is often available every five years, through Census. For this reason, it is necessary to briefly describe Vancouver Island / Coast Development Region, as some of the data derived for the study area is based on data available for the Development Region.
This section briefly describes the Vancouver Island / Coast Development Region’s population and make-up of the economy.

Over the past decade from 2011 to 2022, population in BC grew at an average rate of 1.5% per year. Population in the Vancouver Island Coast Development Region has experienced a similar pace, also at 1.5% per year. Only the Lower Mainland/Southwest Development Region and the Thompson Okanagan Development Region experienced slightly higher annual rates of population growth (1.7% and 1.6% respectively).

Table 2 – Labour Force Distribution by Industry, Vancouver Island/Coast Development Region and BC, 2021

Labour Force Share by Sector	Van Is Coast		BC	
	Number	Share	Number	Share
11 Agriculture, forestry, fishing and hunting	12,800	3.0%	60,320	2.3%
21 Mining, quarrying, and oil and gas extraction	2,500	0.6%	24,955	0.9%
22 Utilities	1,655	0.4%	14,820	0.6%
23 Construction	39,160	9.1%	234,345	8.8%
31-33 Manufacturing	17,080	4.0%	152,790	5.7%
41 Wholesale trade	6,995	1.6%	80,165	3.0%
44-45 Retail trade	51,585	11.9%	301,060	11.3%
48-49 Transportation and warehousing	16,725	3.9%	142,230	5.4%
51 Information and cultural industries	6,855	1.6%	71,295	2.7%
52 Finance and insurance	11,005	2.5%	95,560	3.6%
53 Real estate and rental and leasing	8,105	1.9%	59,155	2.2%
54 Professional, scientific and technical services	34,325	7.9%	238,650	9.0%
55 Management of companies and enterprises	525	0.1%	5,785	0.2%
56 Administrative and support, waste management and remediation services	19,620	4.5%	110,215	4.1%
61 Educational services	31,930	7.4%	192,855	7.3%
62 Health care and social assistance	62,310	14.4%	319,525	12.0%
71 Arts, entertainment and recreation	10,540	2.4%	60,775	2.3%
72 Accommodation and food services	30,965	7.2%	182,105	6.9%
81 Other services (except public administration)	18,400	4.3%	113,780	4.3%
91 Public administration	41,385	9.6%	142,730	5.4%
Sum of Above Industries*	424,450	98.3%	2,603,110	98.0%

Source: Statistics Canada, Census 2021; (note that in Census data there is employment assigned to “industry not applicable”)*

The Vancouver Island/Coast Development Region accounts for about 16% of B.C.’s workers. Service industries dominate the economy of the Development Region. As the provincial capital is in the Development Region, public administration accounts for almost 10% of the region’s employment total.

Other important service industries include health care, retail trade, and professional, scientific and technical services. The above Table 2 shows the distribution of the Development Region's workforce by sector, both in absolute numbers and in percentages. It also shows comparison with the workforce distribution in BC.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Table 3 Labour Force Distribution by Major Occupation Group, Vancouver Island/Coast Development Region and BC, 2021

Labour Force Share by Occupation	Van Is Coast		BC	
	Number	Share	Number	Share
0 Legislative and senior management occupations	5,180	1.2%	32,255	1.2%
1 Business, finance and administration occupations	66,015	15.3%	446,160	16.8%
2 Natural and applied sciences and related occupations	31,710	7.3%	209,185	7.9%
3 Health occupations	38,310	8.9%	199,185	7.5%
4 Occupations in education, law and social, community and government services	58,460	13.5%	309,360	11.6%
5 Occupations in art, culture, recreation and sport	16,225	3.8%	110,585	4.2%
6 Sales and service occupations	110,060	25.5%	666,705	25.1%
7 Trades, transport and equipment operators and related occupations	74,125	17.2%	469,450	17.7%
8 Natural resources, agriculture and related production occupations	14,375	3.3%	72,075	2.7%
9 Occupations in manufacturing and utilities	9,995	2.3%	88,155	3.3%
Sum of Above Occupations*	424,450	98.3%	2,603,110	98.0%

Source: Statistics Canada, Census 2021
(note that in Census data there is employment assigned to "occupation not applicable")*

Table 3 above shows the distribution of the Development Region's workforce by major occupational group. Sales and service occupations accounts for one in four jobs in the workforce. Trades, transport and equipment operators, as well as business, finance and administration occupations account for almost one in three in the workforce.

3.1.3 STUDY REGION CITY/STRATHCONA REGIONAL DISTRICT/REGIONAL DISTRICT OF MOUNT WADDINGTON ECONOMY

This section will cover a study regional economy past and outlook; and a study regional population growth and outlook.

REGIONAL ECONOMY AND POPULATION

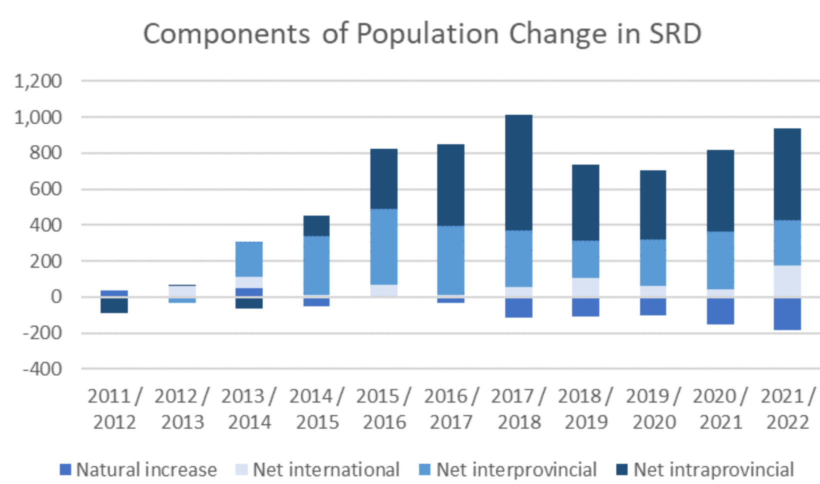
The Strathcona Regional District has a land area of 18,330 km² and a 2021 census population of 48,150. Major communities include Campbell River, Sayward, Gold River, Tahsis, and Zeballos. Its electoral areas include Area A (Kyuquot/Nootka-Sayward), Area B (Cortes Island), Area C (Discovery Islands-Mainland Inlets), and Area D (Oyster Bay-Buttle Lake).

The Regional District of Mount Waddington has a land area of 20,288 km² and a 2021 population of 10,839. Major communities include Port McNeill, Port Hardy, Port Alice, and Alert Bay. There are no incorporated communities on the mainland of the Regional District.

Over the past decade, Strathcona Regional District (SRD) has almost kept up with the population growth pace as the rest of the population growth in Vancouver Island/Coast Development Region, at the rate of 1.3% per year, while the Regional District of Mount Waddington (RDMW) has experienced barely any growth at all, at the rate of 0.1% per year. The City of Campbell River, which is the biggest city within SRD and accounts for about ¾ of the SRD population, grew at the rate of 1.4% per year over the same period.

In terms of changes in the population components, population growth in SRD can be almost entirely attributed to net in-migration, i.e., from immigrants, from people from out the province, and from people in BC but outside of the regional district. In fact, natural increase in population became negative since 2016 (Figure 7).

Figure 7 – Components of Population Change, SRD, 2011/12 to 2021/22

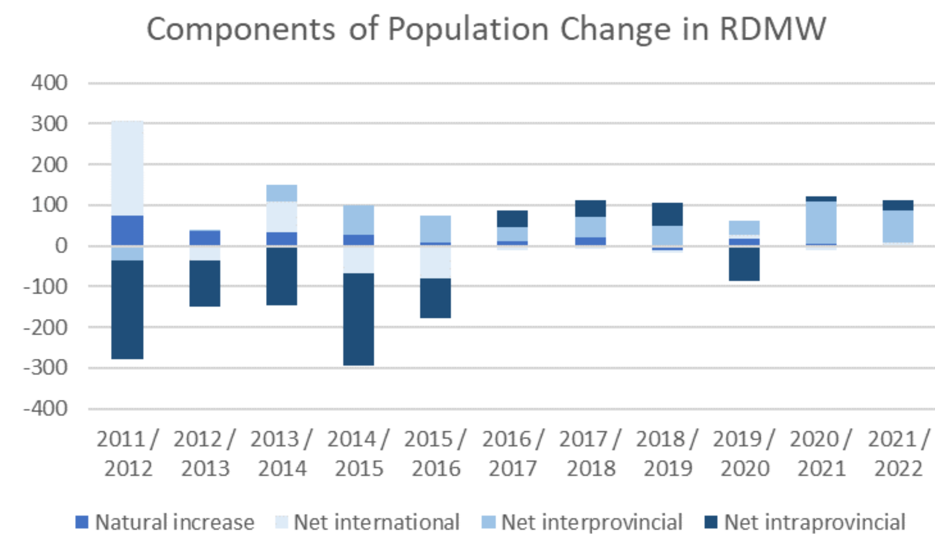


Source: Statistics Canada. Table 17-10-0140-01

In RDMW, the pattern has been different (Figure 8). Natural increase in population remains positive, although the pace of increase is declining rapidly. From 2011 to 2016, in-migration from people out of the province to the regional district remained positive. However, more people from within the regional district left for other parts of the province than those coming in, resulting in negative net in-migration. From 2016 to 2022, there has been positive interprovincial in-migration and positive intraprovincial in-migration, resulting in positive net in-migration.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 8 – Components of Population Change, RDMW, 2011/12 to 2021/22



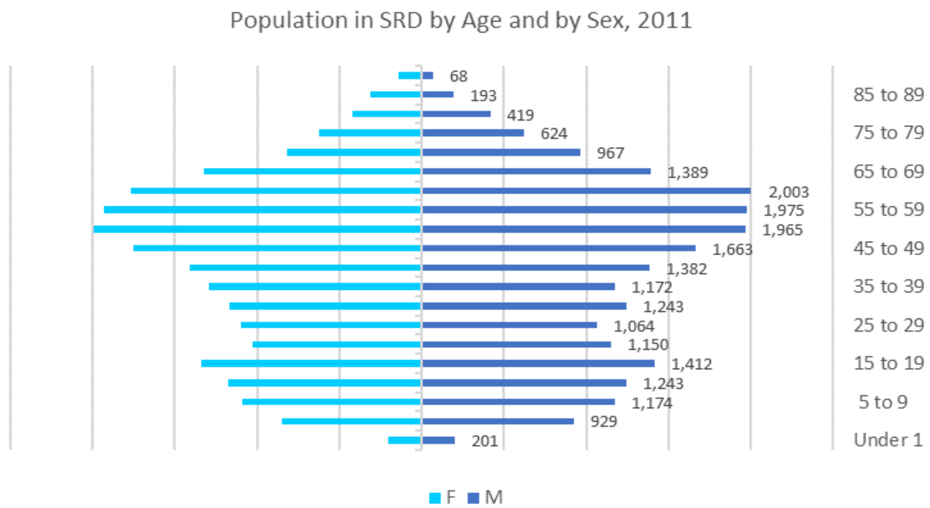
Source: Statistics Canada. Table 17-10-0140-01

Economic development will benefit greatly if the City, SRD and RDMW can attract and keep more people in the core working age population (25-54 years of age). Currently their shares of the population (34.3%, 33.6% and 35% respectively) lag behind the average for Vancouver Island / Coast Development Region (35.8%), or the provincial average of 40.1%.

POPULATION OUTLOOK FOR THE STUDY AREAS

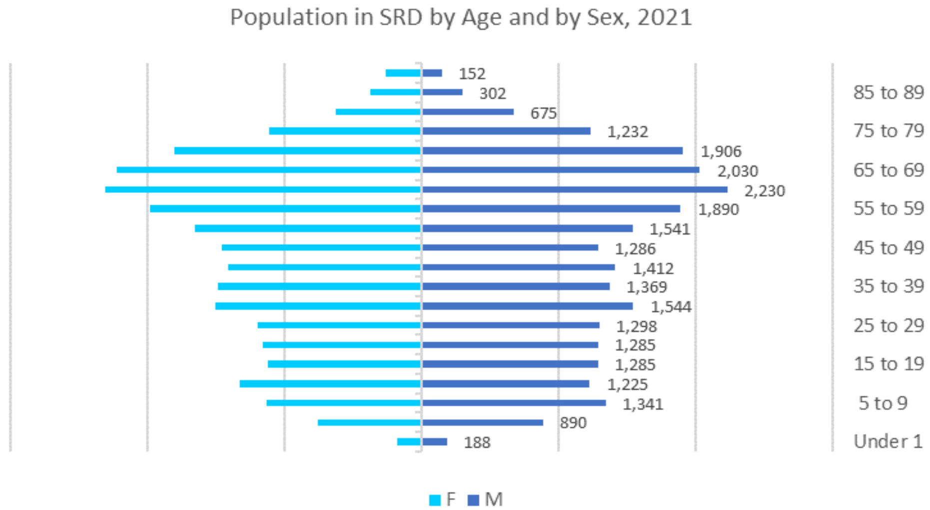
The three figures (Figures 9, 10 and 11) to follow illustrate the change of population age structure over time in the SRD. Between 2011 and 2021, while the youth population (age 0 to 24 years) barely grew (average annual rate of 0.07%), the working age population (age 25 to 64 years) grew modestly (at an average annual rate of 0.2%), the age 65 and plus population grew substantially, at a rate of 5.7% per year. Looking forward, it is projected that the youth population will fare slightly better, growing at a rate of 0.4% per year over the next 10 years, as will the working age population (at a rate of 0.5% per year). The age 65 and plus population is projected to grow the fastest among these three broad population groups, although at a slightly slower pace (at a rate of 3.2% per year) than the previous 10 years.

Figure 9 – Population Distribution by Age and by Gender, SRD, 2011



Source: BC Stats.

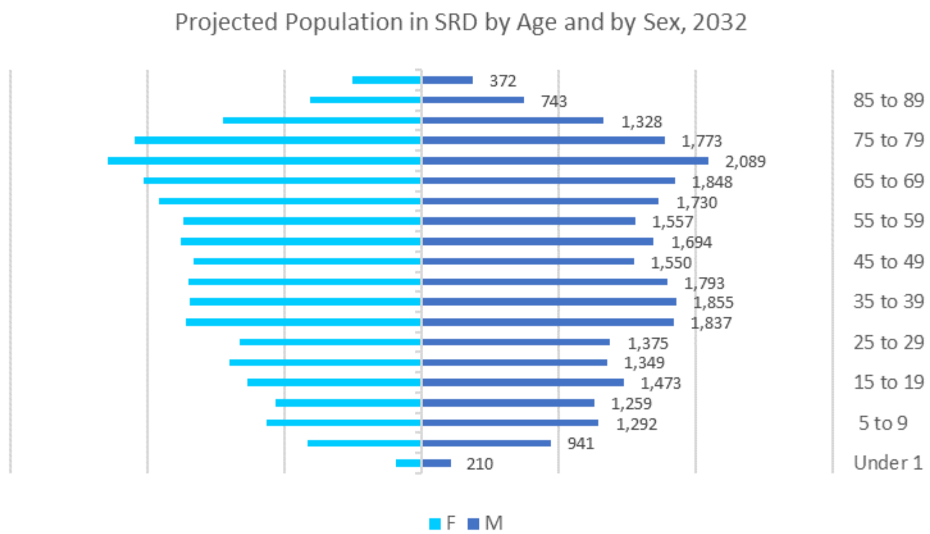
Figure 10 – Population Distribution by Age and by Gender, SRD, 2021



Source: BC Stats.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 11 – Projected Population Distribution by Age and by Gender, SRD, 2032



Source: BC Stats.

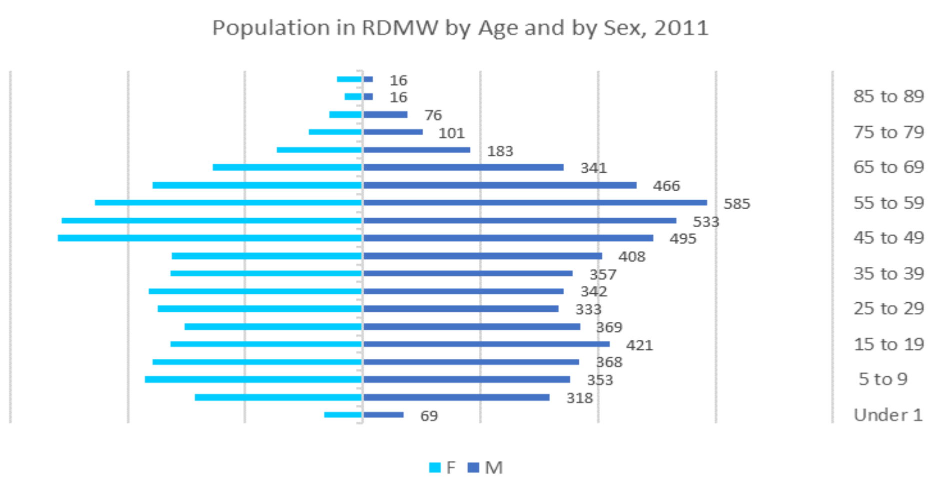
The three figures above show how the population in the SRD is changing over time. The most notable trend is aging. In 2011, the largest age groups were from 50 to 65. Not surprisingly, by 2021 the biggest groups had aged to 60 to 75 years. Ten years from now, if present trends continue and are not offset by large scale in-migration, the largest age cohorts in the region will be the over 70’s. In all cases, the numbers of young workers and children (potential future workers) remain small.

The following three figures (Figures 12, 13 and 14) illustrate the change of population age structure over time in the RDMW. Between 2011 and 2021, while the youth population (age 0 to 24 years) declined (average annual rate of 0.7%), the working age population (age 25 to 64 years) declined even faster (at an average annual rate of 1.3%), the age 65 and plus population grew substantially, at a rate of 6.3% per year. Combined with data shown in components of population change, it is clear that the population net out-migration during these 10 years would have been attributed to the loss of those in the working age population, while the net in-migration that occurred most likely was attributed to those in older population.

Looking forward, it is projected that the youth population will fare better, growing at a rate of 0.6% per year over the next 10 years. However, it is also projected that the decline of the working age population will accelerate (at a rate of 3.2% per year). The age 65 and plus population is projected to grow the fastest among these three broad population groups, although at a slightly slower pace (at a rate of 6.0% per year) than the previous 10 years.

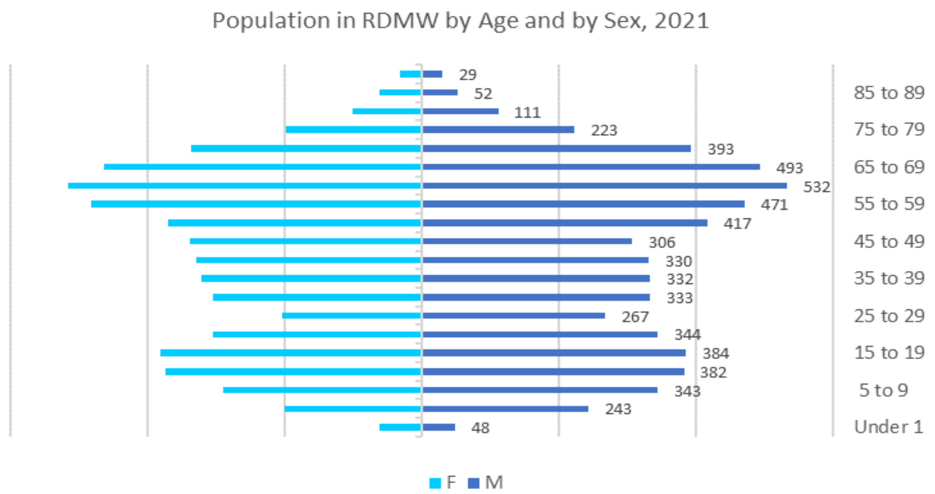
TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 12 – Population Distribution by Age and by Gender, RDMW, 2011



Source: BC Stats.

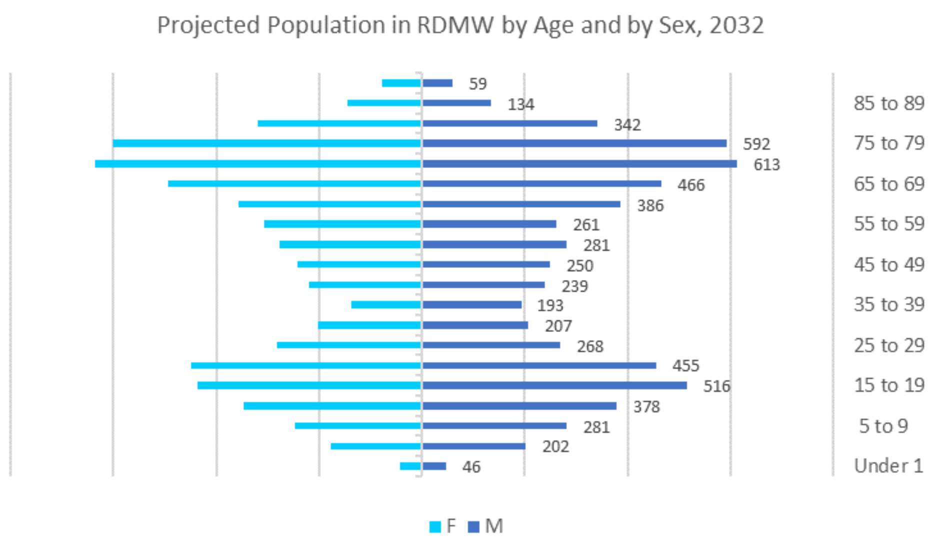
Figure 13 – Population Distribution by Age and by Gender, RDMW, 2021



Source: BC Stats.

TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 14 – Projected Population Distribution by Age and by Gender, RDMW, 2032



Source: BC Stats.

The aging patterns in RDMW are similar with respect to the older age groups. However, very noticeable on the charts is the more immediate and serious problem of the small and falling share of the population that is in the young working ages of the twenties and thirties. Again, massive immigration, especially of younger workers and families will be needed to help counteract this trend. In this subsection, we have shown the change of population age structure over time in the study area. These population growth charts show that population in the study area is aging rapidly, and the trend is going to continue in the next 10 years. The declining shares of the youth population and the working age population pose significant challenges to maintaining a pool of labour supply to support the local economy. The increasing share of the senior population has significant implications for health care services and other services required.

EMPLOYMENT AND LABOUR FORCE

As Table 4 reflects, for the entire study region, the economic base is dominated by forestry and public service (not only federal / provincial / municipal administration but also health care, education and social services). The primary industries are significant to the Mount Waddington economy. The area under study in this report is one of the most important timber production areas in Canada and was the location of one of the few specialty cellulose mills (sulphite pulp) on the continent. It is also home to approximately half the farmed salmon production on the BC Pacific Coast. Tourism accounts for between 5% and 7% of the economic base, with Campbell River on the higher end and Mount Waddington on the lower end.

Table 4 – Labour Force Distribution by Industry, City of Campbell River, SRD, RDMW, and Vancouver Island/Coast Development Region, 2021

Labour Force Share by Sector	City		SRD		RDMW		Van Is Coast	
	Number	Share	Number	Share	Number	Share	Number	Share
11 Agriculture, forestry, fishing and hunting	1,300	7.7%	1,950	8.7%	790	15.1%	12,800	3.0%
21 Mining, quarrying, and oil and gas extraction	550	3.3%	660	3.0%	90	1.7%	2,500	0.6%
22 Utilities	120	0.7%	130	0.6%	10	0.2%	1,655	0.4%
23 Construction	1,525	9.1%	2,060	9.2%	320	6.1%	39,160	9.1%
31-33 Manufacturing	555	3.3%	775	3.5%	275	5.3%	17,080	4.0%
41 Wholesale trade	225	1.3%	315	1.4%	70	1.3%	6,995	1.6%
44-45 Retail trade	2,240	13.4%	2,830	12.7%	550	10.5%	51,585	11.9%
48-49 Transportation and warehousing	645	3.8%	930	4.2%	325	6.2%	16,725	3.9%
51 Information and cultural industries	150	0.9%	235	1.1%	65	1.2%	6,855	1.6%
52 Finance and insurance	350	2.1%	405	1.8%	75	1.4%	11,005	2.5%
53 Real estate and rental and leasing	265	1.6%	370	1.7%	75	1.4%	8,105	1.9%
54 Professional, scientific and technical services	895	5.3%	1,185	5.3%	215	4.1%	34,325	7.9%
55 Management of companies and enterprises	25	0.1%	30	0.1%	0	0.0%	525	0.1%
56 Administrative and support, waste management and remediation services	705	4.2%	905	4.0%	180	3.4%	19,620	4.5%
61 Educational services	925	5.5%	1,275	5.7%	420	8.0%	31,930	7.4%
62 Health care and social assistance	2,820	16.8%	3,510	15.7%	580	11.1%	62,310	14.4%
71 Arts, entertainment and recreation	320	1.9%	470	2.1%	105	2.0%	10,540	2.4%
72 Accommodation and food services	1,250	7.5%	1,665	7.4%	330	6.3%	30,965	7.2%
81 Other services (except public administration)	795	4.7%	1,010	4.5%	275	5.3%	18,400	4.3%
91 Public administration	780	4.6%	1,165	5.2%	380	7.3%	41,385	9.6%
Sum of Above Industries*	16,440	98.0%	21,875	97.9%	5,120	98.0%	424,450	98.3%

Source: Statistics Canada, Census 2021
(note that in Census data there is employment assigned to "industry not applicable")*

Data from the 2021 Census indicates the differences in the industry structure of the City of Campbell River (which is part of SRD), SRD as a whole and RDMW, in comparison with Vancouver Island Coast Development Region.

As per above (Table 4), the share of workers in resource extraction industries (agriculture, forestry, fishing and hunting, as well as mining) in the City of CR and the overall SRD is much higher than the average for the Vancouver Island Coast Development Region, or the provincial average.
There are also a higher-than-average proportion of workers working in retail trade, health care and social services. On the other hand, there are lower than average proportions of workers working in information and cultural industries, professional, scientific and technical services, educational services, and public administration.

Agriculture, forestry, fishing and hunting accounts for the highest share of the workforce in all industries in the in RDMW, indicating the importance of these industries in the local economy. There are also higher proportions of workers in mining, manufacturing, as well as in transportation and warehousing when compared with shares of the workforce in these industries in the Vancouver Island Coast Development Region.

As per Table 5, people working in trades, transport and equipment operator occupations and in sales and service account for the largest share of the workforce (about 45 out of 100 jobs). Occupations in education, law and social, community and government services, along with health occupations, account for almost another 20 out of 100 jobs. On the other hand, occupations in arts, culture, recreation and sports account for no more than 3 out of 100 jobs.

In terms of the highest-level educational achievement (Table 6), those with no formal education (i.e., with no certificates, diplomas or degrees) account for 18% of the population (population aged 15 years and over), while 33% of the population have only high school education. 11% of the population have had training in trades and this is higher than the average in the Vancouver Island / Coast Development Region or in BC. 15% of the population have had a bachelor's degree or higher.

Table 5 Labour Force Distribution by Major Occupation Group, City of Campbell River, SRD, RDMW, and Vancouver Island/Coast Development Region, 2021

Labour Force Share by Occupation	City		SRD		RDMW		Van Is Coast	
	Number	Share	Number	Share	Number	Share	Number	Share
0 Legislative and senior management occupations	115	0.7%	200	0.9%	45	0.9%	5,180	1.2%
1 Business, finance and administration occupations	2,335	13.9%	3,060	13.7%	575	11.0%	66,015	15.3%
2 Natural and applied sciences and related occupations	1,085	6.5%	1,385	6.2%	285	5.5%	31,710	7.3%
3 Health occupations	1,590	9.5%	1,980	8.9%	310	5.9%	38,310	8.9%
4 Occupations in education, law and social, community and government services	1,865	11.1%	2,415	10.8%	625	12.0%	58,460	13.5%
5 Occupations in art, culture, recreation and sport	315	1.9%	470	2.1%	120	2.3%	16,225	3.8%
6 Sales and service occupations	4,550	27.1%	5,750	25.7%	1,155	22.1%	110,060	25.5%
7 Trades, transport and equipment operators and related occupations	3,225	19.2%	4,530	20.3%	1,250	23.9%	74,125	17.2%
8 Natural resources, agriculture and related production occupations	970	5.8%	1,475	6.6%	450	8.6%	14,375	3.3%
9 Occupations in manufacturing and utilities	395	2.4%	625	2.8%	305	5.8%	9,995	2.3%
Sum of Above Occupations*	16,440	98.0%	21,875	97.9%	5,120	98.0%	424,450	98.3%

Source: Statistics Canada, Census 2021
(note that in Census data there is employment assigned to "occupation not applicable")*

For population in the working age group (25 to 64 years of age), 13% have had no formal training, 32% have a high school diploma, 56% have post-secondary education and training (including 12% with training in trades), and 17% have had an undergraduate degree or higher.

Table 6 –Population Aged 15 Years and Over by Highest Level of Educational Attainment, City of Campbell River, SRD, RDMW, and Vancouver Island/Coast Development Region, 2021

Labour Force Population by Education	City		SRD		RDMW		Van Is Coast	
	Number	%	Number	%	Number	%	Number	%
No certificate, diploma or degree	4,560	15.3%	6,465	16.0%	2,270	24.4%	93,140	12.7%
High school diploma or equivalent	10,020	33.7%	13,425	33.2%	2,780	31.1%	216,310	29.5%
Post secondary diploma, certificate, or degree	15,130	50.9%	20,580	50.9%	3,895	43.6%	423,440	57.8%
Post secondary diploma, certificate below degree	10,655	35.9%	14,295	35.3%	2,805	31.4%	230,225	31.4%
Apprenticeship or trades certificate	3,455	11.6%	4,690	11.6%	955	10.7%	66,010	9.0%
Bachelor's degree or higher	4,475	15.1%	6,285	15.5%	1,090	12.2%	193,210	26.4%
Total	29,710	100.0%	40,470	100.0%	8,940	100.0%	732,895	100.0%

Source: Statistics Canada, Census 2021
(note that in Census data there is employment assigned to "occupation not applicable")*

3.2 Regional Sectoral Analysis

In this section, we will provide an in-depth analysis of four sectors in the study region – aquaculture, forestry, health care and tourism. For each sector, current and recent past business trends and employment estimates are provided.

3.2.1 AQUACULTURE

Industry classification

The industry classification used in this report comes from the North America Industry Classification System (NAICS), published by Statistics Canada. Aquaculture, according the NAICS definition, includes all "establishments primarily engaged in farm-raising aquatic animals and plants. Establishments primarily engaged in raising both aquatic animals and plants in integrated growing operations, aquaponics, are also included. These activities can occur both in natural waters and in artificial aquatic impoundments and include the use of some form of intervention in the rearing or growing process to enhance production."

It is noted that within the aquaculture sector, a proportion of the companies are vertically integrated, engaging in both aquaculture farming and fish processing. Companies whose primary output (as measured by GDP or employment) is fish processing are accounted for in NAICS 3117 (seafood production, preparation and packaging). Therefore, such a vertically integrated enterprise will only be counted as an aquaculture business if the share of processing is below the share in farming.

There are three components to aquaculture in BC: fin fish (primarily salmon), shellfish and plants. The BC government site (https://www2.gov.bc.ca/gov/content/industry/agriculture-seafood/fisheries-and-aquaculture/aquaculture) on aquaculture describes the important role of aquaculture in British Columbia and provides many links to information, statistics and reports on the industry. Currently almost all salmon are farmed in net pens in the ocean. Less than 1% are farmed in recirculating aquaculture systems (RAS)[10], where salmon would be raised in completely enclosed systems on land.

The aquaculture industry achieved rapid growth from 1990 to 2011, increasing three-folds in real GDP. Most of the increase took place between 1999 and 2002, and 2005 and 2007 when output spiked in both salmon and shellfish farming.[11] By comparison, real GDP in commercial fishing reached its peak in early 1990's. Between 1993 and 1999, real GDP in commercial fishing dropped more than two-thirds. Between 2000 and 2011, real GDP generated from commercial fishing declined 24%.[12]

Figure 15 shows the real GDP attributed to aquaculture in BC, along with commercial fishing, from 2011 to 2021.[13] Compared with the changes in real GDP in the previous two decades, aquaculture during this period can be categorized as relatively steady growth.

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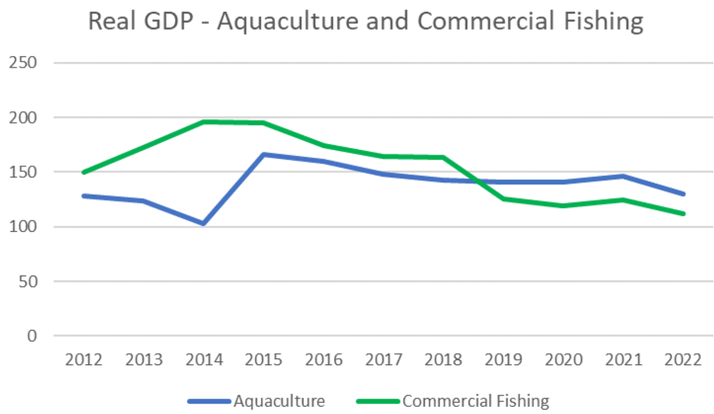
[10] Counterpoint Consulting Inc. (2022). RAS Salmon Farming in British Columbia – Economic Analysis & Strategic Considerations. Retrieved at https://www2.gov.bc.ca/assets/gov/farming-natural-resources-and-industry/agriculture-and-seafood/fisheries-and-aquaculture/aquaculture-reports/ras_salmon_farming_in_bc_-_economic_analysis__strategic_considerations.pdf.

[11] BC Stats. (2012). British Columbia's Fisheries and Aquaculture Sector, 2012 Edition.

[12] BC Stats. (2012). British Columbia's Fisheries and Aquaculture Sector, 2012 Edition.

[13] Note that commercial fishing GDP is estimated using GDP for Fishing, Hunting and Trapping (NAICS 114000) as a proxy.

Figure 15 - Real GDP in Aquaculture & Commercial Fishing, BC, 2012-2022 (in $ millions, chained 2012)

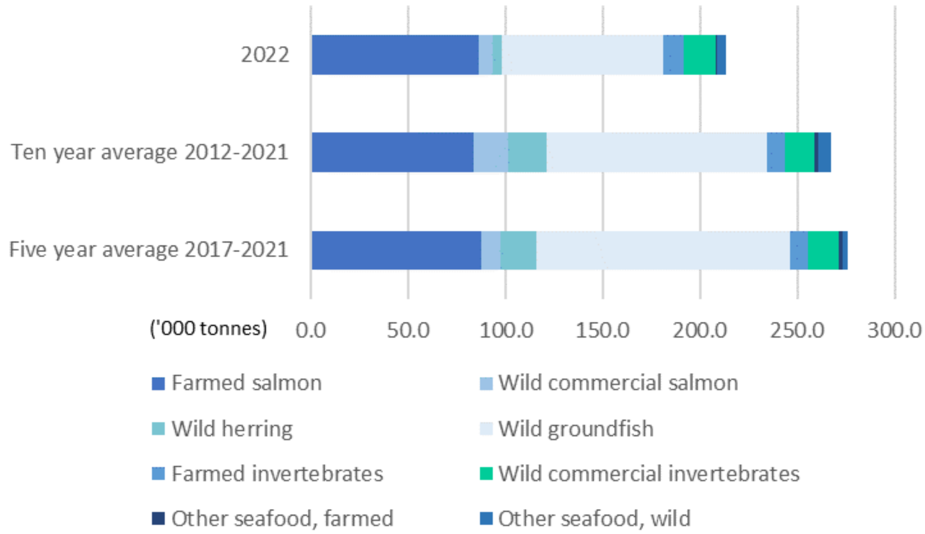


Source: Statistics Canada and Adapted from Statistics Canada. Table 36-10-0402-01 Gross domestic product (GDP).

Figure 16 shows the different species of seafood that have been farmed or captured. The data have been presented using either a five-year average or a 10-year average to smooth out the yearly fluctuation in output. Within the aquaculture sector, the output of salmon accounted for almost 90% of the total, while shellfish accounted for less than 10% of the total output.

AQUACULTURE

Figure 16 – Output in Aquaculture and Commercial Fishing by Species, BC, 2012 to 2022



Source: Ministry of Agriculture and Food, October 2023.

Table 7 shows the number of (active and inactive) aquaculture operators in BC from 2016 to 2021.[14] At the time of this report (2023), data from the federal Fisheries & Oceans Canada indicates that currently there are 85 marine finfish operators, 236 freshwater/land-based fish operators (further sub categorized into 113 freshwater/land-based operators, 7 for recreational stocking, 96 for salmonid enhancement program community involvement, and 18 salmonid enhancement program major facilities), and 482 marine shellfish operators in BC.[15]

[14] From the BC Government's agriculture and seafood statistics publications – Sector Tables 2022 – Seafood: Wild Commercial and Aquaculture. Accessed in November 2023: https://www2.gov.bc.ca/gov/content/industry/agriculture-seafood/statistics/agriculture-and-seafood-statistics-publications.
[15] From Fisheries and Oceans Canada's publication – Current valid British Columbia aquaculture licence holders. Accessed in December 2023: https://open.canada.ca/data/en/dataset/522d1b67-30d8-4a34-9b62-5da99b1035e6.

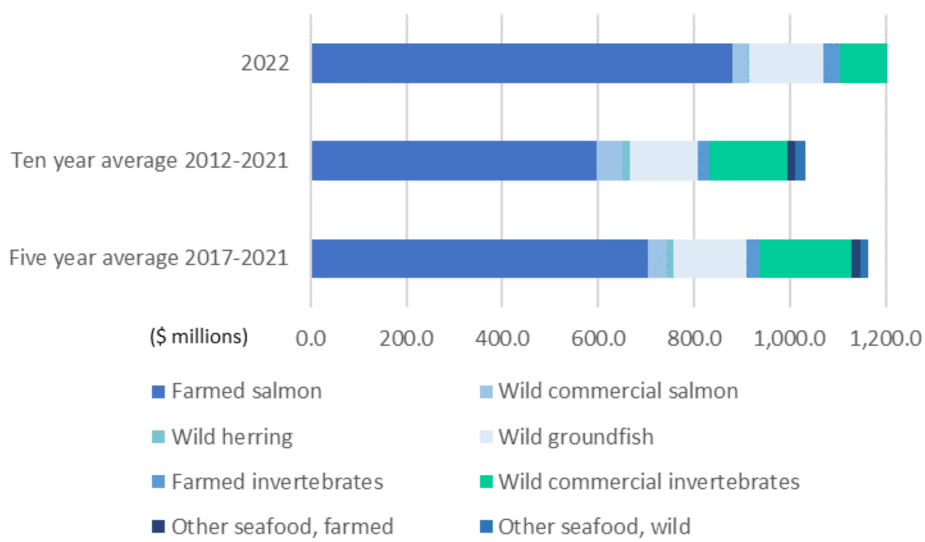
Table 7 Number of Aquaculture Operations, B.C. (2016-2022)*

Species Group	2016	2017	2018	2019	2020	2021	2022	Five-year average 2017-2021	2021/22 % change
Marine Invertebrates	460	467	476	481	486	478	482	478	0.8%
Marine Fish	119	118	116	110	111	109	85	113	-22.0%
Freshwater/Land-based Fish	111	107	113	113	114	233	234	136	0.4%
Marine Algae	18	18	14	17	24	23	27	19	17.4%
Total	708	710	719	721	735	843	828	746	-1.8%

Source: Fisheries & Oceans Canada (invertebrates, fish) and BC Ministry of Agriculture & Food (algae).
** includes both active and inactive operations*

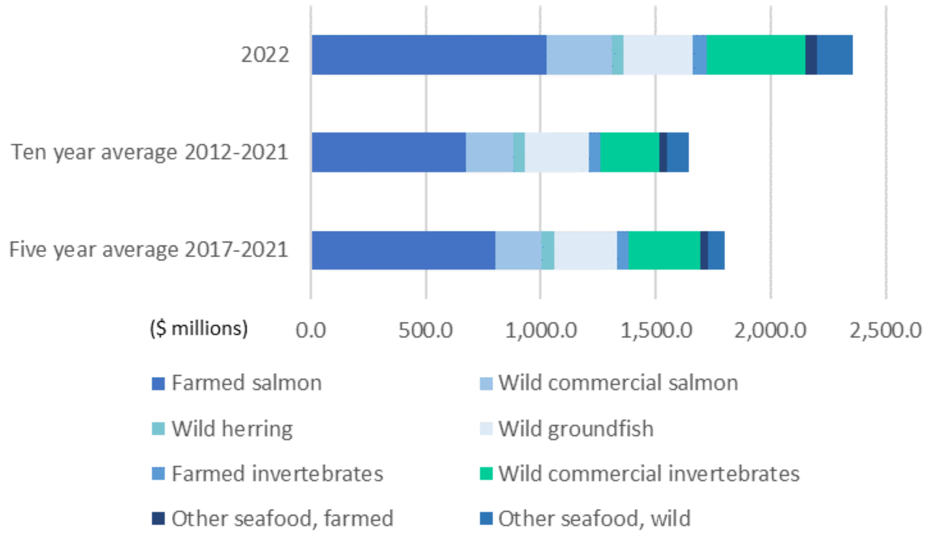
The revenue generated from BC's aquaculture sector, especially farmed salmon, plays an important role in contributing to the province's GDP. In Figure 16 the output of farmed salmon accounts for 31.7% of the total of all seafood harvested (using the five-year average for comparison), however, the same output generated more than 60% of the total landed value of all seafood harvested, as shown in Figure 17, or 45% of the total wholesale value of the seafood harvested (in Figure 18).

Figure 17 – Landed Value of Aquaculture and Commercial Fishing by Species, BC, 2012 to 2022



Source: Ministry of Agriculture and Food, October 2023.

Figure 18 – Wholesale Value of Aquaculture and Commercial Fishing by Species, BC, 2012 to 2022

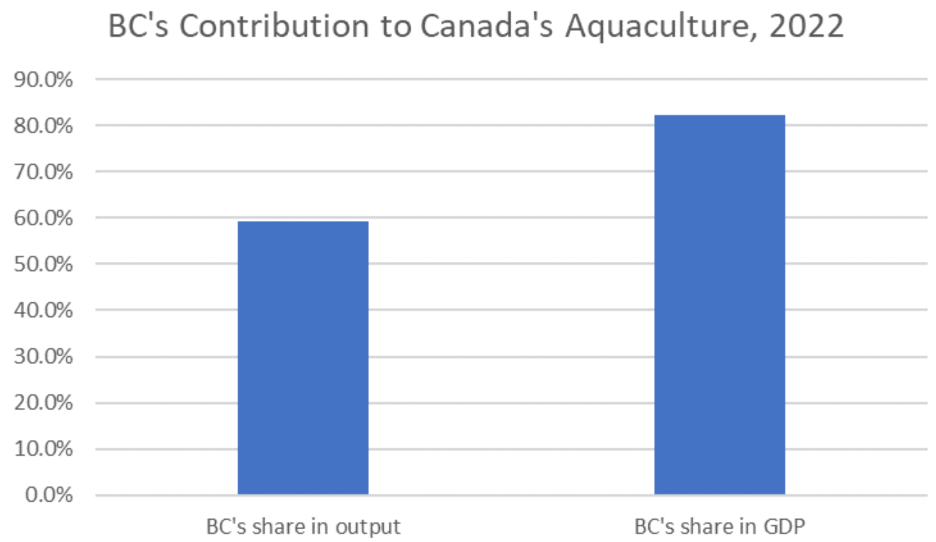


Source: Ministry of Agriculture and Food, October 2023.

Similarly, BC's aquaculture sector contributes more value-added to the Canadian aquaculture sector than its production, as shown in Figure 19.

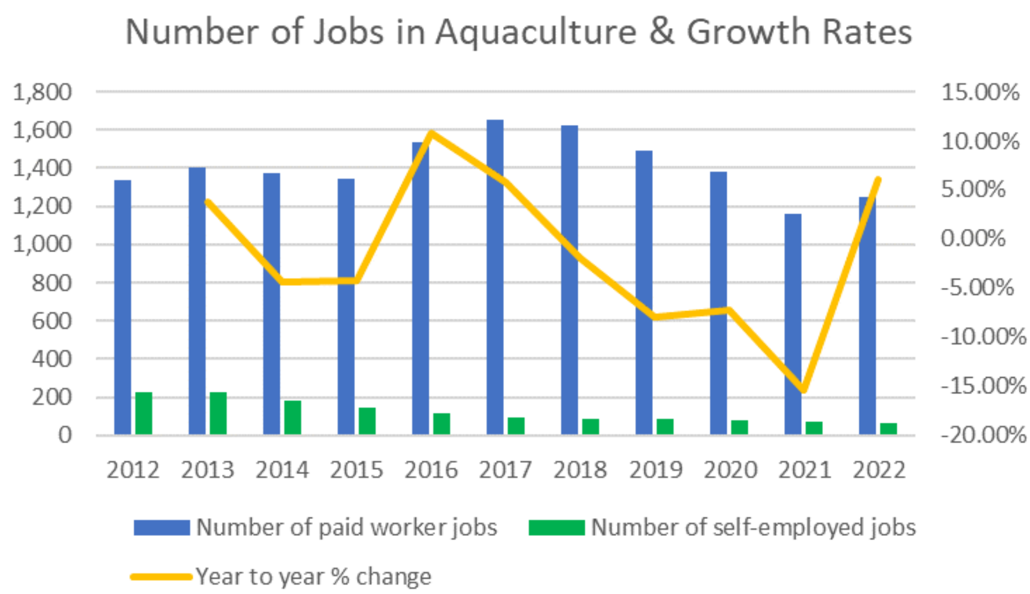
Employment in BC's aquaculture sector is estimated at 1,565 in 2012, and 1,310 in 2022 (Figure 20). In between these years, employment (as represented by the number of jobs) peaked around 1,750 in 2017 and 2018. The decline in 2020 was brought on by the loss of economic activities in general due to the pandemic, and the decline in 2021 would most likely be due to uncertainty around possible regulation change.

Figure 19 – BC's Aquaculture Sector in Canada



Source: Statistics Canada. Table: 32-10-0108-01 Aquaculture economic statistics, value added account (x 1,000)

Figure 20 – BC's Aquaculture Employment



Source: Statistics Canada. Table 36-10-0489-01 Labour statistics consistent with the System of National Accounts (SNA), by job category and industry.

Table 8 – Summary of Primary Occupations in Aquaculture and Related Industries

	Description	Qualifications	Examples
0823 – Managers in aquaculture	"Managers in aquaculture manage operations of facilities which cultivate and harvest fish, shellfish or marine plants for replenishment of wildlife stocks or for commercial sale. They are employed by public or private fish hatcheries and commercial aquatic farms, or they may be self-employed." Typical duties include: - Managing the overall operation of an aquatic farm - Identify requirements of the species and oversee preparation of site for cultivation - Determine food requirements and structure feeding regimes. - Collect and record growth data and production. - Maintain financial records and establish market strategies, inventory and quality control methods.	Typically, those in this occupational group have completed a post-secondary education program and/or have several years of experience in aquaculture operations.	Aquaculture managers and operators; hatchery managers; fish farmer; salmon/mussel farmer; etc.
2221 – Biological technologists and technicians	"Biological technologists and technicians provide technical support and services to scientists, engineers and other professionals working in fields such as agriculture, resource management, environmental protection, plant and animal biology, microbiology, cell and molecular biology and health sciences, or may work independently in these fields. They are employed in both laboratory and field settings by governments, manufacturers of food products, chemicals and pharmaceuticals, biotechnology companies, health, research and educational institutions, environmental consulting companies, and resource and utilities companies." ▪ Set-up and conduct biological, microbiological and biochemical tests and laboratory analyses in support of research and quality control in food production, sanitation, etc. ▪ Perform experimental procedures in agriculture, plant breeding, animal husbandry, biology and biomedical research	Qualifications for this occupation typically require completion of a post-secondary program in agriculture, biology, biomedical research and environmental protection; assist in conducting field research and surveys to collect data and samples of water and/or others. Certification with provincial associations is recommended, but not necessary. Note: There is limited mobility among occupations in this group.	Fish hatchery technician; aquaculture technician; microbiologist technician; fish farm technician

	Description	Qualifications	Examples
	▪ Analyze data and prepare reports		
8613 – Aquaculture and marine harvest labourers	"This occupational group includes aquaculture support workers, marine plant gatherers, shellfish diggers and other labourers in aquaculture and fishing. Aquaculture support workers are employed by public or private fish hatcheries and commercial aquatic farms. Marine plant gatherers and shellfish harvesters may be self-employed." Typical duties and responsibilities associated with this occupation include: - Clean, sort, and transport shellfish to market - Prepare aquaculture stocks for market ▪ Keep daily records of water flow and fish samples - Feed aquaculture stocks, vaccine stocks, perform culling and marking or banding techniques and report any observed irregularities in stocks. - Grade and weigh aquaculture stocks.	Typically, partial completion of secondary education is required and/or have several years of experience in aquaculture operations. For wild shellfish harvesters, commercial fishing licenses are required.	Fry marker; shellfish harvester; fish farm helper/labourer; aquaculture support worker; hatchery worker/helper

Source: Reproduced from MQO Research. (2018). Labour Market Analysis of the Newfoundland and Labrador Aquaculture Industry, page 31, Table 14.

Table 8 above is a summary of the key occupations in aquaculture and related occupations. In the table, training requirements of these occupations are also shown.

The aquaculture sector in BC is one of the smallest sectors in the economy, but they contribute significantly to the local economy in the study area. Based on DFO's licensing data, in RDMW area, businesses currently hold 30 out of the 85 total finfish permits, and in SRD area, businesses hold 2 out of the total. For shellfish, businesses in SRD hold 81 out of the total 482 permits.

At this time the federal government (Fisheries and Oceans Canada) is further proposing to curtail open net salmon farming with the potential to be replaced eventually with RAS production. Issues such as sea lice from farmed salmon affecting wild salmon are among the reason for this decision.

The BC Salmon Farmers provides much useful information including a report[16] on how the industry has dealt with these and other issues and a second report[17] on the damage the decision to stop net pen fish farming in the Discovery Islands will cause. Farmed salmon is the largest food product exported from BC. Other things being equal, the closure could cause a reduction of 1,500 direct, indirect and induced jobs, the loss of a quarter of farmed salmon output (equal to two years wild salmon catch), $390 million in gross provincial output and $21 million in tax revenue.[18] As the Coalition of First Nations for Fin Fish has documented,[19] First Nations who have participated in this sector will be affected and the maintenance and growth of wild salmon could be limited as the salmon farms provide hatchlings, etc. to help maintain wild stock. Significant amounts of time and capital are needed before RAS could replace these losses.

Table 9 shows the breakdown of potential job losses of employees by their residence location, and the value of loss of salaries and benefits due to the closure of farms in Discovery Islands should no active steps betaken to implement RAS as a replacement.

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[16] BC Salmon Farmers. BC Salmon Aquaculture Transition: Then and Now. Retrieved at: https://www.bcsalmonfarmers.ca/wp-content/uploads/2023/01/BCSFA_Transition_ThenNow_Report-1.pdf.

[17] RIAS Incorporated for BC Salmon Farmers. *Consequences of the Decision to Shut Down Salmon Farming in the Discovery Islands*. Retrieved at: https://www.bcsalmonfarmers.ca/wp-content/uploads/2022/12/BCSFA-RIASINC-Final-Discovery-Islands-Damage-Report.pdf. February 2021.

[18] RIAS Inc. (2021). Consequences of the Decision to Shut Down Salmon Farming in the Discovery Islands. It is noted that in the 1,500 total jobs lost due to the shutdown of salmon farming in Discovery Island, 690 were direct jobs (including 222 jobs in salmon farms, and 468 "front-end" jobs such as those in brood stock farms, hatcheries, smolt farms, and primary processing.)

[19] Coalition of First Nations for Fin Fish. "First Nations have the right to make their own decisions in their territories." Retrieved at: https://www.firstnationsforfinfish.ca.

Table 9 Impact of Discovery Islands Closures on Employees Working on Impacted Salmon Farms and their Families

	Courtenay/Comox/ Cumberland	Campbell River/ Sayward/ Discovery Islands	Port Hardy/Port McNeill	Port Alberni/ Tofino/ Ucluelet	West Coast NVI	Sunshine Coast/Metro Vancouver	Other	Total
Number of employees – by residence location	19	**92**	**18**	4	1	83	5	222
Salaries & benefits	$1.47 m	**$7.30 m**	**$1.43 m**	$0.34 m	--	$6.48 m	$0.59 m	$17.7 m
% above average salary for the region	31.7%	**52.6%**	**34.1%**	50.8%	--	33.5%	--	--
Number of dependent adults affected *	13	**51**	**4**	2	1	51	3	125
Number of dependent children affected	8	**48**	**8**	6	0	53	9	131

Source: Reproduced from RIAS Inc. (2021). Consequences of the Decision to Shut Down Salmon Farming in the Discovery Islands. Prepared for BC Salmon Farmers Association", page 5, Table 3.
** dependent adults risk losing or facing reduced extended health, dental, life insurance and spousal RRSPs.*
*** dependent children face risk of losing extended health, dental or life insurance.*

A third report,[20] released by the BC Salmon Farmers in 2022, further estimated the potential economic loss to salmon farms on Vancouver Island if the federal government further decided not to renew their licenses in 2022. Below (Table 10) is a summary of the estimated loss by production region, with bolded area showing the negative impact on the study region in this report. The estimated impact in dollar value or employment represents the combined direct, indirect, and induced impacts. Again, active policies to enable the establishment of RAS could alleviate these effects.

[20] RIAS Incorporation and BC Salmon Farmers, op. cit.

AQUACULTURE

Table 10 Potential Economic Losses within BC if Licenses Are Not Reissued, by region ($ millions) *

Production Region	Output	GDP	Labour Income	Employment
Courtenay/Comox/Cumberland	$48	$17	$14	193
Port Hardy/Port McNeill	**$135**	**$47**	**$38**	**512**
Port Alberni/Tofino/Ucluelet	$55	$20	$16	215
West Coast NVI	$47	$16	$13	181
Sunshine Coast/Metro Vancouver	$326	$122	$101	1,373
Other**	$585	$205	$84	2,244
Total	$1,196	$427	$267	4,718
Estimated Loss Already Taking Place in the Broughton and Discovery Island***	**$419**	**$150**		**1,652**

Source: Reproduced from RIAS Inc. & BC Salmon Farmers Association's report "What Salmon Farming Licence Renewal Means to B.C.'s Coast", page 7, Table 3.
** For members of the BCSFA.*
*** Other includes impacts in other regions of BC, as well as impacts that were not allocated to any particular region within BC*
**** These figures represent updated values and are therefore different from the values presented in the 2021 report "Consequences of the decision to shut down salmon farming in the Discovery Islands".*

A relatively new component of aquaculture which displays great potential is mariculture, the cultivation of marine plants usually referred to as seaweed. It is relatively new to the BC coast and Vancouver Island. Given growing preferences for eating local, this sector already has a market in the 16 million pounds of seaweed that were imported to this continent in 2019. Not only can seaweed increase food security, but its cultivation also helps improve the ocean environment and the inputs are only sunlight and salt water at temperatures found on the BC coast. As it grows, mariculture will provide environmentally compatible income and employment to coastal communities including the Indigenous. However, industry intelligence points out that there is a lack of curriculum on the farming of aquatic plants in post-secondary education institutes in BC.

The aquaculture industry played an important role of the economy in the City, the SRD, and RDMW. This section demonstrates employment development and other measures of this sector over the past decade. However, the industry in the study region will face major adjustments due to government regulation change. As demonstrated, potential loss of employment in salmon farms could have a major negative impact to local economies.

Land-based salmon farming production in BC accounts for a 0.26% of the value of BC's farmed salmon and steelhead trout production, which includes recirculating aquaculture systems (RAS). Growth of this sector is constrained by many factors (primarily capital cost – but also by access to highly skilled labour). The following recommendations were made in a report recently commission by the Ministry of Agriculture and Food on the future development or land-based farming, in particular RAS, in BC: [21]

- Provide funding for a wage subsidy program to support development of RAS operational skills.
- Liaise with the federal government to simplify permitting foreign RAS workers.
- Provide financial support for advanced education, co-op training, and First Nations' aquaculture training programs, including the development of curriculum for RAS systems.
- Working with industry and First Nations, develop a labour strategy for aquaculture with specific reference to emerging sectors such as RAS.
- Support youth development initiatives that encourage careers in aquaculture.

In conclusion, aquaculture has been an important part of the Island and the Indigenous economy. The future of the current major component of aquaculture, net pen salmon farming, is uncertain due to changes in regulation. The budding sector of mariculture shows great potential. Here, as in other sectors, steps must be taken to ensure an adequate labour supply.

3.2.2 FORESTRY

For this study, the forestry sector includes NAICS 113 Forestry and Logging along with NAICS 1153 Support activities for forestry, NAICS 321 Wood Products Manufacturing, and NAICS 322 Paper Manufacturing.

The forestry sector was one of the most important economy and employment generators in BC. However, with changes in market demand and regulatory changes, the sector has experienced decline over the past two decades.

The overall economic impact of the forest industry in BC is described in the report: *Forest Industry Economic Impact Study 2019: Contributing to a Better B.C.*[22]

It measures forestry's share of provincial output (GDP) and the direct, indirect and induced jobs generated by forestry in the province. The geographic division only goes to the Vancouver Island/ Coast region. In this region, forestry contributed $2.16 billion to GDP, resulted in 15, 864 jobs, while providing $1.36 billion in wages. Government revenue is noted as is the contribution it makes to health care and other government services. Issues of sustainability and Indigenous relations are covered.

[21] Counterpoint Consulting Inc. (2022). RAS Salmon Farming in British Columbia – Economic Analysis & Strategic Considerations.

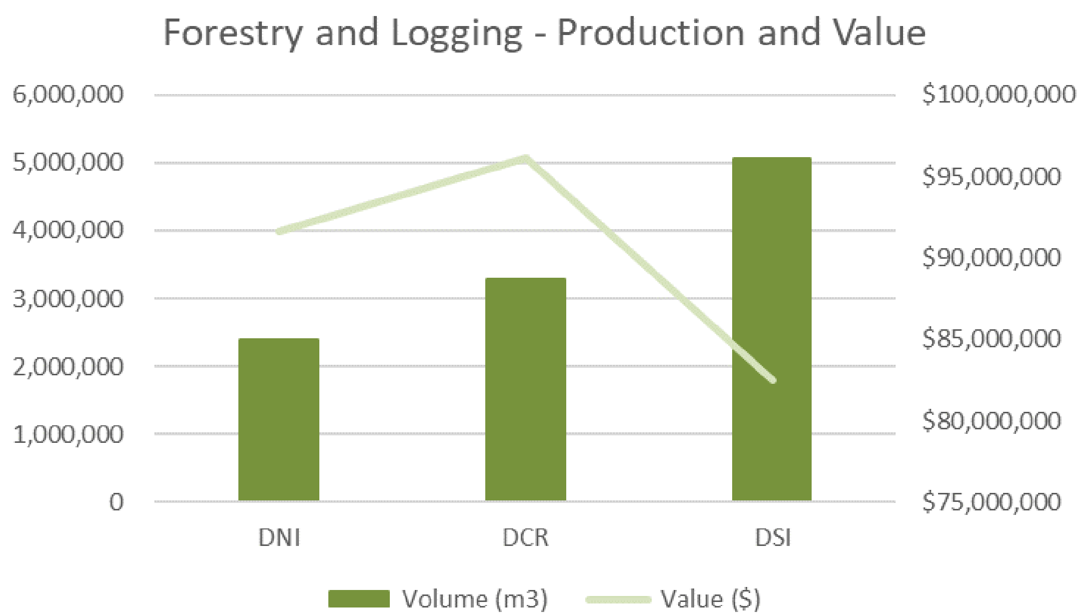
[22] BC Council of Forest Industries. Forest Industry Economic Impact Study 2019: Contributing to a Better BC. Retrieved at https://www.cofi.org/wp-content/uploads/REPORT_COFI-2019-FOREST-INDUSTRY-ECONOMIC-IMPACT-STUDY-FOR-WEB.pdf.

Production and value in the study area can be best estimated using data from the Ministry of Forests. However, the natural resource districts used by the Ministry does not match exactly with the Regional Districts in our study, and as such, these are approximate estimates only.

Figure 21 shows the volume and value of forestry and logging for 2022 in North Island – Central Coast Natural Resource District (DNI), Campbell River Natural Resource District (DCR), and South Island Natural Resource District (DSI) that approximate the geographic area of Vancouver Island / Coast Dev. Region.

FORESTRY

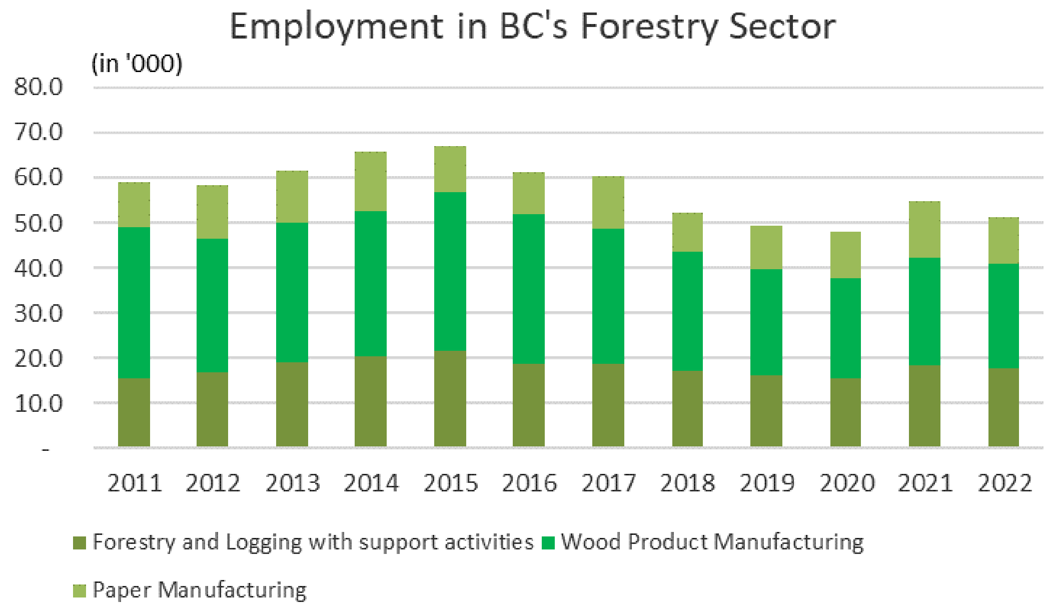
Figure 21 – Forestry and Logging Production Volume and Values in Selected Natural Resource Districts, 2022



Source: Ministry of Forest, Harvest Billing System

Figure 22 that follows describes how overall employment in BC's forestry sector has changed over the past 10 years.

Figure 22 – BC's Forestry Sector Employment



Source: Statistics Canada, Labour Force Survey (unpublished data). Reproduced and distributed on an "as is" basis with the permission of Statistics Canada. Produced by BC Stats.

In the Vancouver Island / Coast Development Region, forestry and logging with support activities has maintained positive employment growth over the past ten years (gaining about 1,400 jobs), and employment in wood product manufacturing and in paper manufacturing declined (loss of 1,700 and 1,500 jobs respectively).

3.2.3 HEALTHCARE

The healthcare sector is important not only in its own right, but also because its lack is a major deterrent to population and workforce growth and retention in communities where it is not sufficiently available.

There are three sub-sectors within the health care sector:

- Ambulatory health care services (NAICS 621) comprise establishments primarily engaged in providing health care services, directly or indirectly, to ambulatory patients. Health practitioners in this subsector provide out-patient services, in which the facilities and equipment are not usually the most significant part of the production process.

- Hospitals (NAICS 622) comprises establishments, licensed as hospitals, primarily engaged in providing diagnostic and medical treatment services, and specialized accommodation services to in-patients. These establishments have an organized medical staff of physicians, nurses and other health professionals, technologists and technicians. Hospitals use specialized facilities and equipment that form a significant and integral part of the production process. Hospitals may also provide a wide variety of out-patient services as a secondary activity.
- Nursing and residential care facilities (NAICS 623) are establishments primarily engaged in providing residential care combined with either nursing, supervisory or other types of care as required by the residents. In this subsector, the facilities are a significant part of the production process and the care provided is a mix of health and social services, with the health component being largely nursing services.

The *Health Professions and Occupations Act*, also called Bill 36[23] replaces the *Health Professions Act*. The primary objectives of the Bill are to prioritize protection of the public and to facilitate good governance by regulators.

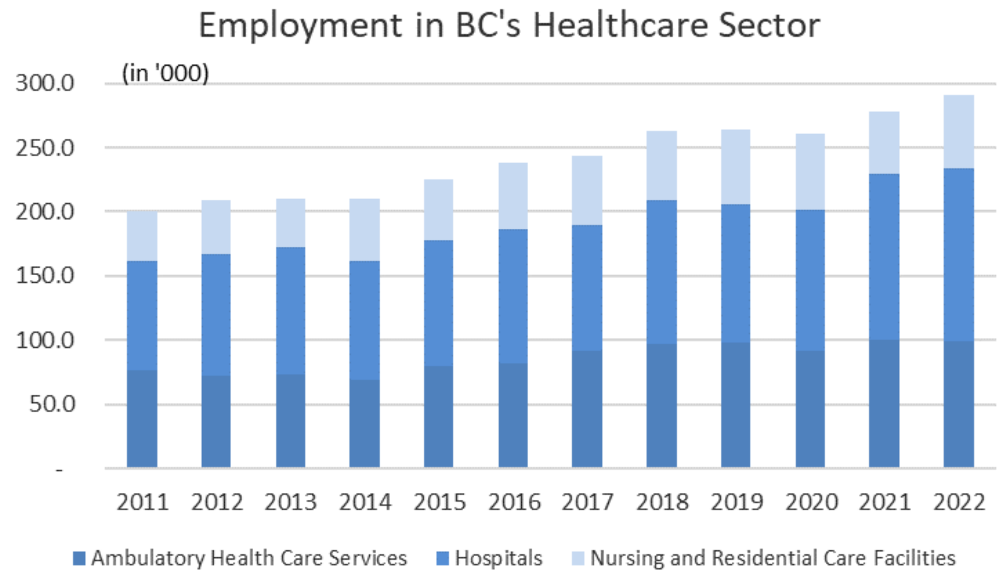
Under this act, professional regulatory bodies will have the advancement of the best interests of the public as their first and most important purpose. Since shortages of medical personnel especially in smaller communities are a major concern of British Columbians at this time, we can expect to see measures that will increase the supply of such personnel. Easier, faster and less costly pathways for foreign trained professionals to be able to practice in BC are possible. The BC government has already taken steps in this direction with respect to nurses.[24] It is also increasing the number of training spaces for doctors.

Employment in the health care sector in BC has experienced steady growth between 2011 and 2022 (Figure 23), with a dip in 2020 due to the labour shortage during the onset of the pandemic.

[23] BC Minister of Health. *Bill 36, Health Professions and Occupations Act*. Retrieved at: https://www.leg.bc.ca/content/data%20-%20ldp/Pages/42nd3rd/1st_read/PDF/gov36-1.pdf.

[24] BC Ministry of Health. "Supporting international nurses into BC's health system." News Release. Retrieved at https://news.gov.bc.ca/releases/2022HLTH0120-000589.

Figure 23 – BC's Employment in the Health Care Sector



Source: Statistics Canada, Labour Force Survey (unpublished data). Reproduced and distributed on an "as is" basis with the permission of Statistics Canada. Produced by BC Stats.

In the Vancouver Island / Coast Development Region, all three sub-sectors in health care services gained employment over the past ten years – ambulatory health care services gaining about 2,200 jobs, hospitals gaining 5,700 jobs, and nursing and residential care gaining 500 jobs.

Like the other sectors covered in this report, the health care sector must attract and retain sufficient staff if it is to continue to function. Health care, however, contributes to the economy not only in its own right. An assured, reliable, dependable supply of health care and the personnel to deliver it is absolutely essential if any community or region is to be able to find and keep the people who work in all other sectors and even retain in the community those who are retired and no longer working. The availability or lack of medical services is a key consideration when people and families are deciding where to live or whether to move.

Due to the crucial importance of the health care sector and its vital role in the regions, a special subcommittee of experts and knowledgeable people in the health care area has been created by the Project holder and Partners. They informed and advised the Project Consultant and suggested practical and productive ways to fulfill the staffing needs in medical services.

Shortages of health care personnel have been a long-standing problem throughout BC and not just in North Vancouver Island which must compete with all other areas for these valuable resources. As noted above, the BC government is now taking measures to increase health care staff such as adding to the supply of training seats and making it easier to get foreign credentials recognized. This report considers how SRD and MWRD can build on and benefit from these and other measures.

3.2.4 TOURISM

Following long term trends, economic activity and employment have been shifting from goods to services. Tourism and its various components are an important part of the service economy on North Vancouver Island. They cover a wide range of activities and show good growth potential especially in Indigenous and other communities with few development options.

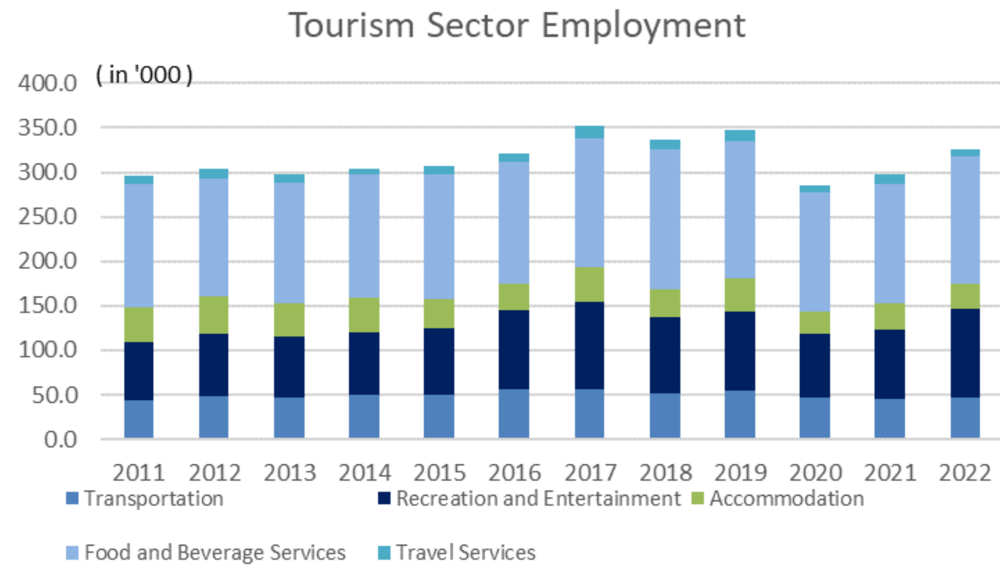
Tourism industry is not a stand-alone classification in the NAICS. Instead, studies over the years have applied different methodology to quantify the contribution of tourism to the economy – revenue, jobs, and GDP. Based on data availability, we are adopting the definition used in a recent provincial study, in which the term “industry” is used to represent the entire tourism and hospitality industry while the term “sector” is used when referring to one or several economic sectors within the industry for this report.[25] This is the classification used in the Tourism Human Resource Module of Statistics Canada’s Tourism Satellite Account, and labour market data and analysis disseminated by the Canadian Tourism Human Resource Council (now called Tourism HR Canada).

Using this definition, the tourism industry is further represented by economic activities in five subsectors: transportation, recreation and entertainment, accommodation, food and beverage services, and travel services.

Figure 24 below shows the employment by subsector in tourism in BC. Food and beverage services is the largest subsector, accounting for 44% of the overall employment in the industry. Its share of the employment has declined from almost 47% over the decade. Recreation and entertainment is the next largest subsector, accounting for 31% of the overall employment. Its share has bee increasing over the decade, from 22% in 2011. Accommodation accounted for almost 9% of the total employment, and this subsector saw its share declining over the decade – from 13% in 2011. Employment in transportation subsector accounted for 14% of the total and its share has remained relatively steady over the decade. Travel services is the smallest subsector, accounting for 2% of the total employment.

[25] go2HR; Qatalyst Research Group. (2022). BC Tourism and Hospitality Labour Market Information (LMI) Research Project

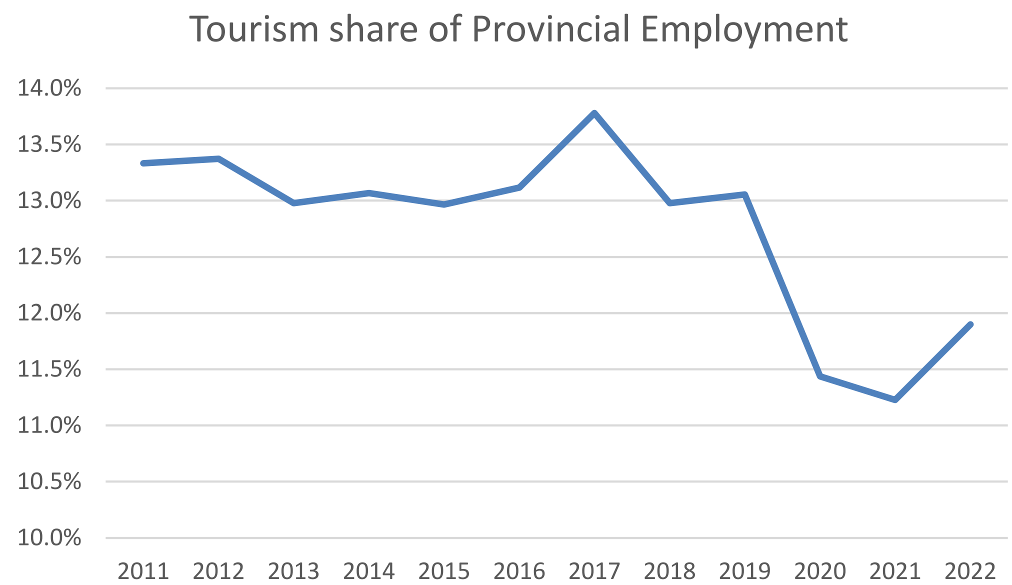
Figure 24 – BC's Employment in the Tourism Industry



Source: Tourism HR Canada which receives customized LFS tables that follow the Tourism Satellite Account's definition of tourism.

Tourism contributes significantly to the provincial economy in jobs and GDP and export of services. However, it was also amongst the hardest hit during the pandemic. Total employment in tourism in the province fell 18% in 2020 from 2019. Situation improved in 2021 and further in 2022, but not as much as other industries in the economy. Therefore, its employment share of the total economy remained below its long-term average, as shown in Figure 25.

Figure 25 –Employment in the Tourism Industry in BC’s Total Employment



Source: Tourism HR Canada which receives customized LFS tables that follow the Tourism Satellite Account’s definition of tourism.

Amongst the different Development Regions in the Province, Vancouver Island / Coast accounts for about 16% of the provincial total, while the Lower Mainland / Southwest takes the largest share, at 65%. Based on the data shown in Table 11, Vancouver Island maintained its employment share, indicating that overall tourism fared better than some other regions in the province.

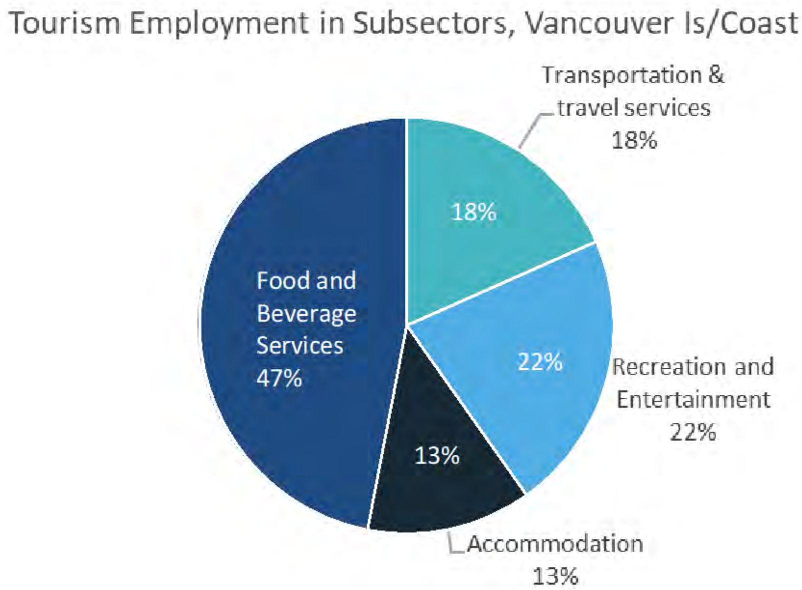
Table 11 Tourism Employment by Development Region, 2011 to 2021

	Lower Mainland		Vancouver Is/Coast		Thompson Okanagan		Northern BC		Cariboo		Kootenay	
2011	187,208	63%	46,771	16%	35,500	12%	7,521	3%	10,042	3%	8,979	3%
2012	195,667	64%	45,208	15%	37,417	12%	7,063	2%	9,354	3%	9,458	3%
2013	181,167	61%	54,229	18%	32,875	11%	7,500	3%	9,771	3%	11,771	4%
2014	188,958	62%	48,271	16%	40,771	13%	9,167	3%	9,292	3%	8,333	3%
2015	196,271	64%	48,563	16%	35,854	12%	9,375	3%	9,313	3%	7,979	3%
2016	211,688	66%	50,271	16%	35,021	11%	9,250	3%	7,354	2%	8,229	3%
201	230,729	66%	53,854	15%	40,229	11%	8,292	2%	8,667	2%	10,188	3%
2018	226,271	67%	49,396	15%	35,063	10%	8,854	3%	8,813	3%	7,917	2%
2019	227,875	65%	53,167	15%	37,063	11%	11,250	3%	9,083	3%	9,646	3%
2020	191,292	67%	43,104	15%	26,729	9%	7,375	3%	7,625	3%	8,750	3%
2021	192,104	64%	47,563	16%	33,063	11%	8,938	3%	8,542	3%	8,042	3%

Source: Reproduced from go2HR & Qatalyst Research Group. “BC Tourism and Hospitality Labour Market Information (LMI) Research Project”, page 13, Table 2

Distribution of employment in subsectors for Vancouver Island / Coast in 2021 is shown in Figure 26. Accommodation as well as the food and beverage services sectors accounted for higher proportions than provincial averages.

Figure 26 –Employment in the Tourism Industry Subsectors, Vancouver Island / Coast, 2021



Source: based on go2HR & Qatalyst Research Group. "BC Tourism and Hospitality Labour Market Information (LMI) Research Project", page 15, Table 3.

Employment by leading occupations in tourism (by size) in presented here, for 2021, in the province (Table 12).

Unfortunately, local, regional level of employment data is only available in broad industry classifications from the Census. In general, there are few indicators available to measure the performance of the tourism industry as a whole for the study area.[26] The data that exists includes room revenue, visitor centre statistics, air passengers, BC ferry traffic, highway volumes, and parks attendance, each of which provides only a partial picture.

In Table 13 below room revenue values are shown. These represent sum of monthly Municipal and Regional District Tax (MRDT) data for the communities. It should be noted that annual totals should be interpreted with caution since data for a community may not be available for all months within the year and it does not necessarily provide a complete picture – different municipalities may impose the tax or opt out of the program at any given time. Despite these cautionary notes, the overall growth trend over the past decade up to 2019 in the study area is observed.

[26] Destination British Columbia. (2018). North Island Destination Development Strategy.

Table 12 Tourism Employment by Top 10 Occupations in BC, 2021

NOC	Occupation	Primary sector	Employment	Ave. hourly rate
6711	Food counter attendants, kitchen helpers	Food & Beverage	43,625	$16.30
6322	Cooks	Food & Beverage	22,750	$17.80
6513	Food and beverage servers	Food & Beverage	21,875	$18.80
0631	Restaurant and food service managers	Food & Beverage	12,708	$25.00
5254	Program leaders and instructors in recreation, sport and fitness	Recreation & Entertainment	11,042	$21.00
6311	Food service supervisors	Food & Beverage	10,542	$19.50
6511	Maîtres d'hôtel and hosts/hostesses	Food & Beverage	8,604	$17.90
6321	Chefs	Food & Beverage	8,167	$21.00
7513	Taxi and limousine drivers and chauffeurs	Transportation & Travel	7,917	$23.00
7512	Bus drivers, subway operators and other transit operators	Transportation & Travel	7,021	$31.00
All			298,250	

Source: Reproduced from go2HR & Qatalyst Research Group. "BC Tourism and Hospitality Labour Market Information (LMI) Research Project", page 23, Table 7

Table 13 Room Revenue by Municipal Jurisdiction, 2010 to 2022 (in $000)

	Campbell River	Central and North Island *
2010	-	17,163
2011	-	18,503
2012	-	12,839
2013	-	22,994
2014	-	23,420
2015	-	42,334
2016	-	54,513
201	14,429	60,598
2018	16,832	63,900
2019	15,732	75,476
2020	9,121	53,972
2021	16,557	88,513
2022	18,854	113,942

Source: BC Stats and Ministry of Finance; March 7, 2023
** Central and North Island aggregation includes the communities of Alert Bay, Courtenay, Port Alice, Mount Washington, Nanaimo, Port Alberni, Port Hardy, Port McNeill, Qualicum, and Hornby Island*

According to the *North Island Destination Development Strategy* report which covered the geographic area of Mount Waddington, Strathcona and Comox Valley Regional Districts, performance of key indicators are as follows:

- Visitor Centre attendance has declined 20% since 2012, with Alert Bay the only Visitor Centre reporting an increase (46%) – up to 2017. The disruption of ferry service to the Central Coast is believed to be partially to blame for this.
- Air passenger traffic in Campbell River declined by 3%, reflecting a local slowdown in construction and other economic activity that had driven rapid growth over the few years prior to 2016.

- All eight Northern Island BC Ferries routes generated overall lower volumes in 2016 when compared to 2009. Total passenger volumes during this period were down 4.5%, from 5.9 million to 5.6 million. It is believed the decline in passenger volumes since the 2008 recession is partly attributable to increased prices and service cuts on many routes. A general uptrend in volumes since 2014 coincides with temporary fare discounts and an increase in international visitors.
- Aggregate highway traffic volumes for the three permanent count stations in the North Island has risen 1.7% annually between 2007 and 2016, while summer average daily traffic was in the same range. Growth was concentrated on the south routes, including Campbell River.
- There are 51 provincial parks in the North Island planning area (i.e., Mount Waddington, Strathcona and Comox Valley Regional Districts), many of which do not track attendance because there are no campgrounds or visitor amenities. For the 2013 to 2015 period, average annual attendance was 684,143, a growth of 35% over the average of 507,880 in the 2006 to 2008 period.

Given the limited data available to derive ratios to represent employment shares in the various sectors of the tourism industry for the study area, we have relied on the shares derived from the 2021 Census and apply them to the tourism industry data from the go2HR labour market study. Estimated employment for the sector and major occupations for the study area is presented in 3.3.1.

This section has provided a statistical profile of the tourism industry and employment outlook. The data available shows that tourism is an important part of the economy. Province wide, employment industry accounted for over 13% of the provincial total from 2011 to 2019. In the study region, workers in the tourism industry accounted for a similar share of the workforce in 2021, indicating the importance of the industry in their respective economy. The pandemic due to COVID-19 hit the industry hard in 2020. Data in 2021 and 2022 indicates that the industry is recovering.

3.3 Current and Projected Labour Market Demand, Supply and Gaps

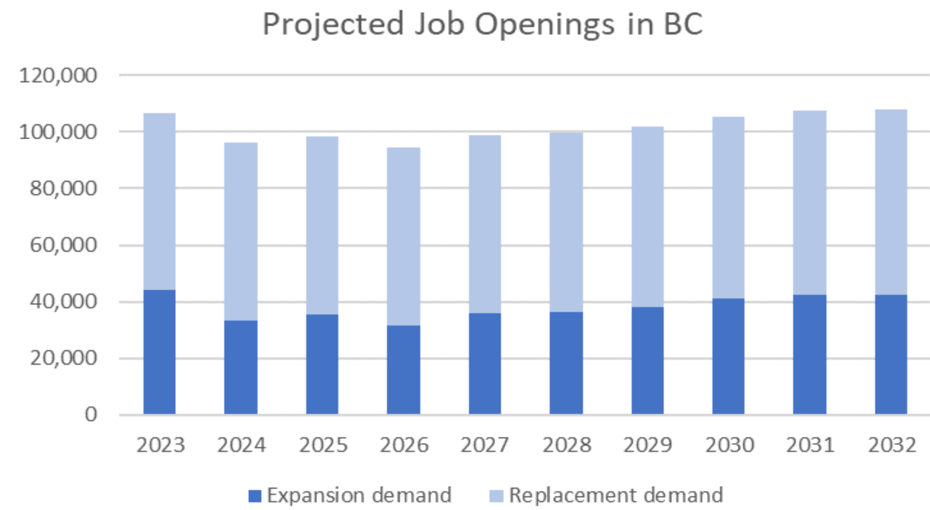
In this report, we present job openings for specific occupations and the overall sector. The change between employment in a sector or an occupation from one year to another results in job increase or job reduction, and the increase is considered “expansion” demand. Sometimes, even when employment in an occupation or a sector remains the same from one year to another, there are openings that need to be filled due to internal turnover – for example some workers retire or leave for a different job. In the *BC Labour Market Outlook: 2022 Edition* Report, job openings due to replacement needs (to replace those who will have left the labour force permanently during a year) are called "replacement" demand.[27] Therefore, total job openings are equal to the sum of "expansion" demand and "replacement" demand.

Above-noted *BC Labour Market Outlook* estimates labour demand for the 500 4-digit National Occupational Classification (NOC) unit groups for 59 industries plus aggregates and special sectors for seven economic regions and the province.[28] Labour supply indicators are provided for the 500 4-digit NOC occupations for four aggregated regions and the province.[29]

This comprehensive report provides the context in which the BC labour market will operate to 2032.[30] It includes details of occupations, wages, industry, training requirements and geography. It projects over a million job openings in the decade to replace retiring workers and to fill new positions. Less than half this need will be met by labour force growth. Much of the remainder will be filled by immigration and in-migration, but that still leaves over 80 thousand openings for which there is no obvious source of workers. Currently there are more job openings in BC than potential workers. Over 80% of jobs will demand post-secondary education. The greatest demand for workers will be in the health care sector. Figure 27 shows the year-by-year projection of job openings province wide.

[27] BC Ministry of Post-Secondary Education and Future Skills. BC Labour Market Outlook: 2022-2032. Retrieved at https://www.workbc.ca/research-labour-market/bcs-labour-market-outlook-2022-edition.
[28] Ministry of Post-Secondary Education and Future Skills. (2023). British Columbia Labour Market Outlook: 2022 Edition.
[29] On labour demand, the seven regions are Vancouver Island/Coast, Mainland/Southwest, Thompson-Okanagan, Kootenay, Cariboo, North Coast and Nechako, and Northeast. On the supply side the four regions are Vancouver Island/Coast; Mainland/Southwest, Southwest (combining Thompson-Okanagan and Kootenay), and North (combining Cariboo, North Coast and Nechako, and Northeast).
[30] BC Ministry of Post-Secondary Education and Future Skills, op. cit.

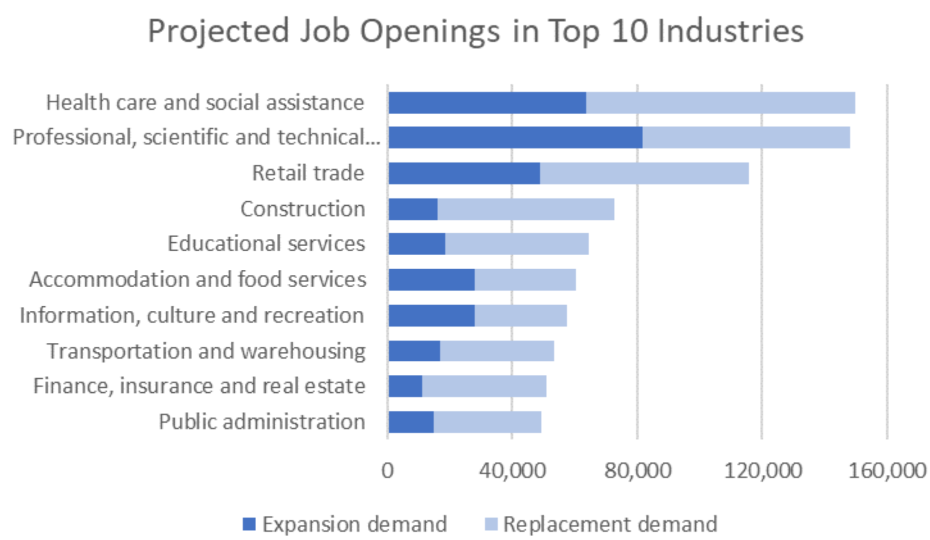
Figure 27 – Projected Job Openings, BC, 2023 to 2032



Source: British Columbia Labour Market Outlook: 2022 Edition

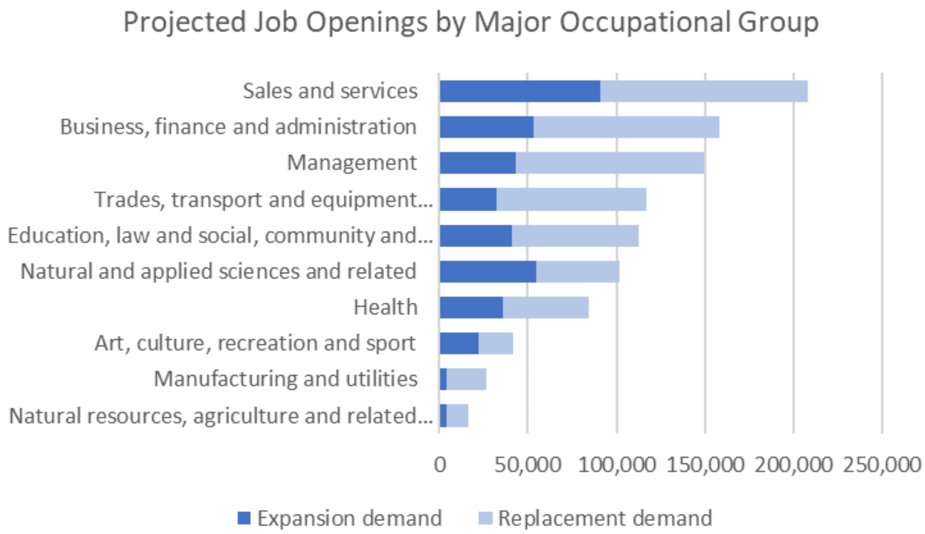
TOURISM HEALTHCARE FORESTRY AQUACULTURE

Figure 28 – Projected Job Openings by Major Industry Groupings – Top 10, BC, 2023 to 2032



Source: British Columbia Labour Market Outlook: 2022 Edition

Figure 29 – Projected Job Openings by Major Occupational Groupings, BC, 2023 to 2032



Source: British Columbia Labour Market Outlook: 2022 Edition

Figures 28 and 29 show the top occupations and industries in terms of job openings to 2032. This shows that British Columbians can look forward to a wide choice of job opportunities and career paths. Individuals looking to get their first job, change careers or get back into the workforce will see strong demand from employers. Employment in B.C. is expected to reach 3.1 million by 2032, up from the 2.7 million jobs forecasted in 2022. Employment will grow by 1.3% a year on average for the forecast period.

This section has shown positive prospects for job growth in BC as well as the changing industry patterns that have been accelerated by the Covid 19 pandemic. It also indicates that this potential will be constrained unless and until the expected labour shortages can be dealt with.

Employment & Labour Force of Indigenous Identity in BC

Labour market information related to Indigenous communities – First Nations, Inuit and Métis – in British Columbia is limited.[31] As a result, the data lack content on Indigenous peoples' experience in the labour market and their contributions to it. For example, Statistics Canada's Labour Force Survey does not include on reserve populations. The Canadian Census generally provides good basic data, but some Indigenous communities have low census participation rates, and the data are only available

[31] Ministry of Post-Secondary Education and Future Skills. (2023). British Columbia Labour Market Outlook: 2022 Edition.

every five years, which limits its relevance. Furthermore, the data were not designed, collected or delivered with full participation from Indigenous communities.

Many Indigenous communities value a wide range of activities that are often not captured by labour market methodologies. For example, some Indigenous communities spend substantial time harvesting, fishing and hunting for food during specific seasons throughout the year. Indigenous people also undertake duties contributing to community, ceremonial and other cultural events. These activities are left out of most official labour market statistics.

The Government of British Columbia, through its Ministry of Post-Secondary Education and Future Skills, is in the early stages of building partnerships with Indigenous communities and organizations to explore Indigenous-led and collaborative approaches to gathering labour market information that meets the needs of Indigenous communities. It is noted that the Sector Labour Market Partnerships program (SLMP) is one resource that is helping Indigenous communities develop better labour market information. This program helps sectors, regions and populations understand and respond to labour market changes.

The SLMP program has partnered on projects with Indigenous communities and organizations to research labour opportunities and find solutions to barriers. For example, Indigenous Tourism British Columbia (ITBC) released three reports in 2021 from the SLMP program: *Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21*; the *BC Indigenous Tourism Labour Force Strategic Plan*, and *Wise Ways: A Guide of Smart Practices to Attracting and Retaining Indigenous Talent*.

These reports recognized the importance and potential of the Indigenous component of the tourism sector in BC.[32] They demonstrated that many Indigenous people wanted to work in this sector but could not find work. It also showed that many employers could not fill their positions and outlined reasons. Lack of housing and infrastructure was one reason for the gap. The reports also include a guide to solving the labour market imbalances.

This section of the report has presented data and analysis on the overall provincial economy and labour market performance, as well as population growth. This is the level of geographic area where statistical data on economic activities and population is available. In the following sections, we further provide data and analysis pertaining to the regions and areas this labour market study project focuses on.

[32] Indigenous Tourism *BC. Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21*; the *BC Indigenous Tourism Strategic Plan*. June 2021. Retrieved at https://www.indigenousbc.com/corporate/news/indigenous-tourism-bc-releases-labour-market-research-indigenous-tourism-labour-strategy-and-a-guide-to-wise-hr-practices/.

According to the *BC Labour Market Outlook* report, job openings will be growing at a 1.5% rate on Vancouver Island Coast, higher than in the Lower Mainland. In fact, this employment growth rate is the highest amongst all development regions.

Over the next decade (from 2022 to 2032), total job openings in the Vancouver Island Coast Development are expected to be 176,705, out of which 67,093 (or 38%) are expected to be new job openings from employment growth, and 109,613 (or 62%) are expected to be openings to replace those workers who permanently leave the labour force (for retirement, for example).

Over the projection period, the region's fastest growing sectors are expected to be Computer systems design and related services; Support activities for mining and oil and gas extraction; Primary metal manufacturing; Travel arrangement services; Nursing and residential care facilities; Management, scientific and technical consulting services; and Personal, non-automotive repair and non-profit services.

For the study area, we have assumed that employment growth for the overall economy is expected to grow at the same rate as that for the Vancouver Island/Coast Development Region. The City of Campbell River is expected to see total job openings of 6,844 over the next 10 years, or approximately 685 jobs to fill per year. For the SRD, it is expected to see total job openings of 9,107 over the next 10 years, or approximately 910 jobs to fill per year. For the RDMW, it is expected to see a total of 2,132 job openings, or approximately 210 per year.

To put these numbers in perspective, in 2021, total number of workers in City of Campbell River was estimated to be approximately 16,500, 21,900 in the broader SRD, and 5,100 in RDMW.

3.3.1 CURRENT EMPLOYMENT BY SECTOR IN STUDY AREA

AQUACULTURE (including Mariculture)

We note that this is a relatively small, yet impactful, sector; overall employment in the province in 2022 is estimated to be 1,310 jobs.

We have to rely on production level to derive estimated employment in the study area. As per data for Figure 16, finfish aquaculture produced 89.0% of the overall aquaculture harvest, while shellfish aquaculture produced 9.1% of the harvest. "Other" types of aquaculture products harvested (particularly fresh water/land-based and mariculture) accounted for the remaining 1.9%. Therefore, we estimate that, finfish aquaculture in the province employed 89.0% o f the total number of jobs in aquaculture, i.e., 1,166 workers, shellfish aquaculture employed 119 workers, while "other" types of aquaculture producers employed 25 workers.

Using data from Fisheries and Oceans Canada (DFO) showing the number of aquaculture licence holders by Pacific Fishery Management Areas, we note that RDMW has 30 out of 85 finfish licence holders, while SRD has 2 out of a total of 85 finfish licence holders. Further, SRD has 81 shellfish licence holders out of a total of 482 licence holders. Assuming each licence holder produces roughly the same harvest, we arrive at the employment estimate for production sites in SRD and RDMW.

We have also been informed by the BC Salmon Farmers Association that there are jobs in the City of Campbell River area (mainly jobs in headquarters of salmon producers) that may not have been captured using the methodology described above. Based on data in an internal BCSFA report, we estimate that salmon farming related employment in the Campbell River/Sayward/Discovery Islands area was 595 in 2022. It should be noted that this number represents "direct" jobs in salmon farming in this area, which include all "front-end" salmon farming operations including not only on-farm grow-out activities, but also broodstock farms, hatcheries, smolt farms and primary processing of farm-raised salmon.

Table 14 below presents our estimates of employment in aquaculture in the study area in 2022.

AQUACULTURE

Table 14 Estimated Employment in Aquaculture, BC, Study Area, 2022

Subsector	BC	SRD	RDMW	City of Campbell River
Finfish aquaculture	1,166	27+595	411	595
Shellfish aquaculture	119	20	-	
Other (fresh water/land-based and mariculture)	25	-	-	
Total aquaculture	1,310	642	411	595
Major Occupations	Van Is / Coast			
#0823 Manager in aquaculture	425			
#2221 Biological technologists and technicians	354			
#8613 Aquaculture and marine harvest labourers	309			

Source: HCS; BC Labour Market Outlook, 2022 Edition.

Major occupations in aquaculture include NOC 0823 managers in aquaculture, NOC 2221 biologist technologists and technicians, and NOC 8613 aquaculture and marine harvest labourers. Estimated employment in these occupations in the Vancouver Island/Coast Development Region is shown in Table 14 as well. However, it should be noted that not all biological technologists and technicians were employed in the aquaculture sector.

Given the relatively small size of the workforce in RDMW and SRD, the total job openings are presented for the entire Development Region for the three major occupations. From 2022 to 2032, total job openings for managers in aquaculture are expected to be 123, total openings for biological technologists and technicians 100, and aquaculture and marine harvest labourers 107.

FORESTRY

Estimated employment by the top 10 occupations in each of the forestry subsectors is presented in Tables 15, 16, and 17. In these tables, we also provide our estimates on employment in these subsectors in the study area. The ratios used to derive employment in logging is based on Ministry of Forests' Harvesting Billing System, while the ratios used to derive employment in wood manufacturing (primarily timber processing mills) is based on the Ministry of Forests' *2020 Major Timber Processing Facilities Survey.* It is noted that no paper manufacturing facilities in the study area appeared in the Survey.

Table 15 Estimated Employment by Top 10 Occupations in Forestry, Logging & Support Services, Vancouver Island/Coast, Study Area, 2022

NOC	Occupation	Van Is / Coast	SRD	RDMW
#8421	Chain saw and skidder operators	708	216	79
#8241	Logging machinery operators	652	199	73
#8616	Logging and forestry labourers	499	153	56
#7511	Transport truck drivers	440	135	49
#8211	Supervisors, logging and forestry	331	101	37
#2223	Forestry technologists and technicians	321	98	36
#7312	Heavy-duty equipment mechanics	199	61	22
#2122	Forestry professionals	193	59	22
#0811	Managers in natural resources production and fishing	158	48	18
#8422	Silviculture and forestry workers	158	48	18
All Occupations		5,444	1,665	608

Source: detailed data from British Columbia Labour Market Outlook: 2022 Edition; HCS.

Table 16 Estimated Employment by Top 10 Occupations in Wood Manufacturing, Vancouver Island/Coast, Study Area, 2022

NOC	Occupation	Van Is / Coast	SRD	RDMW
#9614	Labourers in wood, pulp and paper processing	314	14	14
#9431	Sawmill machine operators	236	10	10
#7311	Construction millwrights and industrial mechanics	129	6	6
#7452	Material handlers	125	5	5
#0911	Manufacturing managers	90	4	4
#9436	Lumber graders and other wood processing inspectors and graders	82	4	4
#7384	Other trades and related occupations, n.e.c.	64	3	3
#9215	Supervisors, forest products processing	60	3	3
#9533	Other wood products assemblers and inspectors	60	3	3
#9434	Other wood processing machine operators	56	2	2
All Occupations		2,144	93	93

Source: detailed data from British Columbia Labour Market Outlook: 2022 Edition, HCS.

Table 17 Estimated Employment by Top 10 Occupations in Paper Manufacturing, Vancouver Island/Coast, 2022

NOC	Occupation	Paper manufacturing
#7311	Construction millwrights and industrial mechanics	195
#9235	Pulping, papermaking and coating control operators	152
#9433	Papermaking and finishing machine operators	117
#9614	Labourers in wood, pulp and paper processing	113
#9241	Power engineers and power systems operators	86
#7242	Industrial electricians	78
#9215	Supervisors, forest products processing	59
#9432	Pulp mill machine operators	55
#0911	Manufacturing managers	43
#7252	Steamfitters, pipefitters and sprinkler system installers	39
All Occupations		1,475

Source: detailed data from British Columbia Labour Market Outlook: 2022 Edition.

Forestry sector has long been a contributor to the study area's economic development and employment opportunities. During the past years, due to competition and government regulation changes, logging activities in the coastal forest has declined. Consequently, employment loss has been experienced.

Forestry can continue to support the region; and regulatory certainty can help facilitate this.

HEALTHCARE

Estimated employment by the top 10 occupations in each of the health care subsectors in the study area is presented in Tables 18, 19 and 20.

Table 18 Estimated Employment by Top 10 Occupations in Ambulatory Healthcare Services, Vancouver Island / Coast, Study Area, 2022

NOC	Occupation	Est. Employment			
		VI/C	City of CR	SRD	RDMW
#3012	Registered nurses and registered psychiatric nurses	1,626	74	92	15
#1414	Receptionists	1,387	63	78	13
#3112	General practitioners and family physicians	1,050	48	59	10
#3413	Nurse aides, orderlies and patient service associates	982	44	55	9
#3411	Dental assistants	848	38	48	8
#3236	Massage therapists	794	36	45	7
#4412	Home support workers, housekeepers and related occupations	677	31	38	6
#3111	Specialist physicians	661	30	37	6
#4212	Social and community service workers	645	29	36	6
#1221	Administrative officers	547	25	31	5
All Occupations		17,564	795	989	163

Source: detailed data from British Columbia Labour Market Outlook: 2022 Edition; HCS.

Table 19 Estimated Employment by Top 10 Occupations in Hospitals, Vancouver Island / Coast, Study Area, 2022

NOC	Occupation	Est. Employment			
		VI/C	City of CR	SRD	RDMW
#3012	Registered nurses and registered psychiatric nurses	7,704	349	434	72
#3413	Nurse aides, orderlies and patient service associates	2,132	96	120	20
#3233	Licensed practical nurses	1,333	60	75	12
#1411	General office support workers	1,200	54	68	11
#6731	Light duty cleaners	657	30	37	6
#3111	Specialist physicians	514	23	29	5
#6711	Food counter attendants, kitchen helpers and related support occupations	486	22	27	5
#3215	Medical radiation technologists	476	22	27	4
#3211	Medical laboratory technologists	467	21	26	4
#1414	Receptionists	409	19	23	4
All Occupations		22,298	1,009	1,256	208

Source: detailed data from British Columbia Labour Market Outlook: 2022 Edition; HCS.

Table 20 Estimated Employment by Top 10 Occupations in Nursing and Residential Care, Vancouver Island / Coast, Study Area, 2022

NOC	Occupation	Est. Employment			
		VI/C	City of CR	SRD	RDMW
#3413	Nurse aides, orderlies and patient service associates	3,401	154	192	32
#4212	Social and community service workers	1,215	55	68	11
#3012	Registered nurses and registered psychiatric nurses	779	35	44	7
#3233	Licensed practical nurses	642	29	36	6
#6711	Food counter attendants, kitchen helpers and related support occupations	573	26	32	5
#4412	Home support workers, housekeepers and related occupations	517	23	29	5
#6731	Light duty cleaners	436	20	25	4
#6322	Cooks	405	18	23	4
#6733	Janitors, caretakers and building superintendents	174	8	10	2
#0311	Managers in health care	162	7	9	2
All Occupations		10,825	490	610	101

Source: detailed data from British Columbia Labour Market Outlook: 2022 Edition; HCS.

Like the other sectors covered in this report, the health care sector must attract and retain sufficient staff if it is to continue to function. Health care, however, contributes to the economy not only in its own right. An assured, reliable, dependable supply of health care and the personnel to deliver it is absolutely essential if any community or region is to be able to find and keep the people who work in all other sectors and even retain in the community those who are retired and no longer working. The availability or lack of medical services is a key consideration when people and families are deciding where to live or whether to move.

Shortages of health care personnel have been a long-standing problem throughout BC and not just in NVI which must compete with all other areas for these valuable resources. As noted above, the BC government is now taking measures to increase health care staff such as adding to the supply of training seats and making it easier to get foreign credentials recognized. This report considers how SRD and MWRD can build on and benefit from these and other measures.

TOURISM

Table 21 below provides our estimates of employment in tourism industry in the study area.

TOURISM

Table 21 Estimated Tourism Employment in Study Region, 2021

	City of Campbell River	SRD	RDMW	Vancouver Is/Coast
Transportation & travel services	337	487	170	8,750
Recreation and Entertainment	314	462	105	10,354
Accommodation	247	329	65	6,125
Food and Beverage Services	902	1,201	238	22,333
Tourism Sector	1,801	2,478	576	47,563

Source: HCS based on BC Tourism and Hospitality Labour Market Information (LMI) Research Project

Table 22 further provides our estimate of the employment by top 10 (by size) occupations in the study region.

As in previous sections of the report, we present labour market related information with an Indigenous focus where information is available.

Table 22 Tourism Employment by Top 10 Occupations in the Study Region, 2021

NOC	Occupation	City	SRD	RDMW	BC
6711	Food counter attendants, kitchen helpers	282	375	74	43,625
6322	Cooks	147	196	39	22,750
6513	Food and beverage servers	141	188	37	21,875
0631	Restaurant and food service managers	82	109	22	12,708
5254	Program leaders and instructors in recreation, sport and fitness	54	79	18	11,042
6311	Food service supervisors	68	91	18	10,542
6511	Maîtres d'hôtel and hosts/hostesses	56	74	15	8,604
6321	Chefs	53	70	14	8,167
7513	Taxi and limousine drivers and chauffeurs	49	70	25	7,917
7512	Bus drivers, subway operators and other transit operators	43	62	22	7,021
All		1,801	2,478	576	298,250

Source: HCS; based on BC Tourism and Hospitality Labour Market Information (LMI) Research Project

Indigenous Tourism

Three recent published reports, "Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21", the "BC Indigenous Tourism Strategic Plan," and "Wise Ways: A Guide of Smart Practices to Attracting and Retaining Indigenous Talent", recognized the importance and potential of the Indigenous component of the tourism sector in BC.[33] It demonstrated that many Indigenous people wanted to work in this sector but could not find work. It also showed that many employers could not fill their positions and outlined reasons. Lack of housing and infrastructure was one reason for the gap.

The reports also include a guide to solving the labour market imbalances. In the labour market research report, it was identified that 102 Indigenous tourism businesses were in operation on Vancouver Island/Coast in 2020 (Table 23). Among these operations, band owned accounted for almost two-thirds (64%), ownership by society accounted for 3%, and the remaining were owned by individuals. The employment by subsectors and by occupation are shown in Table 24.

[33] Indigenous Tourism BC, op. cit.

TOURISM

Table 23 Indigenous Tourism Operators by Sector, Vancouver Island Tourism Region, 2020

	2020	Share
Attraction	10	10%
Accommodation	34	33%
Outdoor Adventure	20	20%
Food and Beverage	1	1%
Festivals and Events	7	7%
Retail	11	11%
Gas	12	12%
Transportation	7	7%
2022	102	100%

Source: Reproduced from Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21, p155, Exhibit 117

TOURISM

Table 24 Indigenous Tourism Operators by Occupation, Vancouver Island Tourism Region, 2020

Occupation	Employed	% of Regional Total	FT	% FT	PT	% PT
Accommodation service managers	91	8%	86	94%	5	6%
Accommodation, travel, tourism and related services supervisors	10	1%	8	75%	3	25%
Accounting and related clerks	5	0%	5	100%	0	0%
Artisans and craftspersons	3	0%	0	0%	3	100%
Bartenders	3	0%	3	100%	0	0%
Boat and cable ferry operators and related occupations	28	2%	15	55%	13	45%
Bus drivers, subway operators and other transit operators	8	1%	3	33%	5	67%
Cashiers	28	2%	18	64%	10	36%
Chefs	10	1%	10	100%	0	0%
Cooks	23	2%	18	78%	5	22%
Food and Beverage Servers	58	5%	46	78%	13	22%

Occupation	Employed	% of Regional Total	FT	% FT	PT	% PT
Food counter attendants, kitchen helpers and related support occupations	63	6%	18	28%	46	72%
Hotel front desk clerks	109	10%	53	49%	56	51%
Janitors, caretakers and building superintendents	25	2%	8	30%	18	70%
Landscaping and grounds maintenance labourers	28	2%	18	64%	10	36%
Library, archive, museum and art gallery managers	3	0%	0	0%	3	100%
Light duty cleaners	111	10%	53	48%	58	52%
Massage therapists	3	0%	3	100%	0	0%
Operators and attendants in amusement, recreation and sport	10	1%	10	100%	0	0%
Other customer and information services representatives	8	1%	5	67%	3	33%
Outdoor sport and recreational guides	43	4%	28	65%	15	35%
Professional occupations in advertising, marketing and public relations	8	1%	3	33%	5	67%
Receptionists	5	0%	5	100%	0	0%
Restaurant and Food Service Managers	3	0%	3	100%	0	0%
Retail and wholesale trade managers	66	6%	63	96%	3	4%
Retail Salesperson	68	6%	40	59%	28	41%
Security guards and related security service occupations	3	0%	0	0%	3	100%
Service station attendants	119	10%	83	70%	35	30%
Support occupations in accommodation, travel and facilities set-up services	46	4%	46	100%	0	0%
Technical occupations related to museums and art galleries	8	1%	0	0%	8	100%
Tour and travel guides	137	12%	73	54%	63	46%
Transport truck drivers	15	1%	5	33%	10	67%
All Occupations in VI	**1,143**	**100%**	**726**	**63%**	**417**	**37%**

Source: Reproduced from Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21, p156, Exhibit 120

3.3.2 TEN-YEAR FORECAST: BASE AND SCENARIO PROJECTIONS

10-YEAR EMPLOYMENT & JOB OPENINGS FORECAST

To project employment by sector and by occupation for the next 10 years, the methodology is generally to apply growth rates for sectors that are applicable to the Vancouver Island/Coast Region to project employment in the study region going forward to 2032. This is assuming that employment growth rates applicable to the sectors in the Study Area are similar to the general macro economic conditions in Vancouver Island/Coast Region (e.g., in forestry and logging, employment is projected to decline at a rate of 1.7% per year from 2022 to 2027, and from 2028 to 2032 employment is projected to decline at a rate of 0.5% per year). Occupations within a sector are assumed to experience the same growth rates as the industry.

In an ideal world, when there is a job opening available and someone looking for work fills that position, the labour market is in perfect balance. In reality, this is rarely the case. In a tight labour market, it may take much longer than usual to fill a position. Other reasons, such as workers changing from one job to another, changing from one company to another, also contribute to the availability of job openings that is not captured in the BC labour market outlook model.

A key part of this 10-year projection of employment is to factor in the reality that to varying degrees, the study area and 4 sectors already have job vacancies or unfilled positions. This report has attempted to estimate this in three scenarios over the 10-year forecast.

Note that for the aquaculture and forest sectors, we have assumed no drastic changes in policy other than those that had been incorporated when the *BC Labour Market Outlook: 2022 Edition* report was produced. Further changes in public policy and regulations will impact resource-based sectors (i.e., aquaculture and forestry and logging).

In a series of tables below, we present a range of job opening numbers for each of the jurisdictions in the study area based on observed job vacancy rates in the recent past as scenario analysis. The reasoning is that we know there will be job openings in an industry due to changes in economic conditions and the needs to replace those who have left the workforce. However, if the observed job vacancies and the time required to fill vacancies is substantial, we know there is unmet labour demand that will need to be addressed.

For the purposes of analysis, we present additional jobs that need to be filled over the study period based on three scenarios:

- The first is based on the average job vacancy rates for industries for the province in the most recent past – six quarters from the first quarter in 2022 to the second quarter of 2023;
- The second is based on the highest job vacancy rates observed for industries for the province – for most industries it was the second quarter in 2022; and
- The third is based on the five-year average job vacancy rates for industries for the province prior to the pandemic – five-year average from 2015 to 2019.

A summary table follows on the next page and then it is followed by a more detailed analysis for each of the four sectors with sector tables for each.

10-YEAR EMPLOYMENT & JOB FORECAST

Estimated Employment in 2022 in the Study Area for Four Sectors and Projected 10-Year Total Job Openings
(Strathcona Regional District & Regional District of Mount Waddington Combined)

Sector	Est. Employment 2022	10-Year Total Job openings	Scenario Analysis - range of additional job
AQUACULTURE	**1,053**	**362**	**205 > 403**
RDMW	411	141	80 > 157
SRD	642	221	125 > 245
CofCR	595	205	116 > 227
FORESTRY	**2,459**	**306**	**333 > 1,411**
RDMW	701	91	89 > 397
SRD	1,758	215	244 > 1,014
HEALTHCARE	**3,327**	**1,646**	**381 > 794**
RDMW	472	233	54 > 113
SRD	2,855	1,413	327 > 681
CofCR	2,294	1,135	263 > 547
TOURISM	**3,249**	**1,441**	**917 > 3,530**
RDMW	613	272	173 > 666
SRD	2,636	1,169	744 > 2,864
CofCR	1,915	850	541 > 2,081

Notes:
- SRD includes City of Campbell River and as such the combined total for the sector is the sum of the value for RDMW and SRD only.
- While using vacancy rate by industry data that applies to "animal production and aquaculture" for scenario analysis results in additional jobs to fill over the period between 2022 and 2032, it is not clear to what extent the observed vacancy rates apply to aquaculture operations in the study area – animal production subsector is substantially larger than aquaculture, and as such the vacancy rates may not be applicable to aquaculture at all. We further note that there was substantial job loss in 2022 in SRD because of the closure of salmon farms along Discovery Passage, which would have resulted in excess supply of workers.

Source: HCS analysis of and extrapolations from: *BC Labour Market Outlook: 2022 edition*, Ministry of Post-Secondary Education & Future Skills; Statistics Canada, *Labour Force Survey* (unpublished data); Statistics Canada, *Job Vacancy and Wage Survey*, various quarters, 2022 and 2023.

AQUACULTURE

The aquaculture sector in BC is one of the smallest sectors in the economy, but it contributes significantly to the local economy in the study area. Based on DFO's licensing data, in RDMW area, businesses currently hold 30 out of the 85 total finfish permits, and in SRD area, businesses hold 3 out of the total. For shellfish, businesses in SRD hold 81 out of the total 482 permits. As there is no data to assist breaking down employment total in the study area by occupation, employment projections in aquaculture have been prepared for the sector only.

In the table below, we first present the total number of job openings using the applicable growth rates from the *BC Labour Market Outlook* data. Then in the other columns we present resulting additional job openings that need to be filled (if any) depending on job vacancy rate assumptions. It is possible to have no additional openings in some of these columns when workers can easily find jobs.

AQUACULTURE

Table 25 Projected Total Job Openings in Aquaculture, Study Area, 2022-2032

Sector	Est. Employment 2022	10-Year Total Job Openings	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
Aquaculture	1,053	362	205	403	-
RDMW	411	141	80	157	-
SRD	642	221	125	245	-
CofCR	595	205	116	227	-

- *Under scenario 1 – job vacancy rate assumed to be 4.9%*
- *Under scenario 2 – job vacancy rate assumed to be 6.5%*
- *Under scenario 3 – job vacancy rate assumed to be 2.7%*

FORESTRY

For employment projections in forestry, logging and support services in the study area (Table 26), it is assumed that average annual employment growth rate will be the same as those applicable to the forestry, logging and support services in Vancouver Island/Coast Development Region – from 2022 to 2027 it is -1.7% per year, and -0.5% per year from 2027-2032. Therefore, there are no expansion demand job openings for the study region. Replacement demand offsets some of the job loss. The negative employment growth rates in forestry and logging to some extent reflect policy/regulatory changes that had already been made at the time the *BC Labour Market Outlook* report was produced. An assumption of job opening projection in Table 27 is that average annual employment growth rate in the wood manufacturing industry on Vancouver Island from 2022-2027 is -0.8% per year, and +0.5% per year from 2027-2032. Replacement demand also contributes to the job openings.
In each table below, we first present the total number of job openings using the applicable growth rates from the *BC Labour Market Outlook* data. Then in the other columns we present resulting

additional job openings that need to be filled (if any) depending on job vacancy rate assumptions. As mentioned, it is possible to have no additional openings in some of these columns.

FORESTRY

Table 26 Projected Total Job Openings by Top 10 Occupations in Forestry, Logging & Support Services, Study Area, 2022 -2032

NOC	Occupation	SRD	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	RDMW	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
#8421	Chain saw and skidder operators	51	55	101	6	19	19	37	2
#8241	Logging machinery operators	34	63	106	19	12	12	39	7
#8616	Logging and forestry labourers	15	60	92	26	5	5	34	9
#7511	Transport truck drivers	23	43	72	13	8	8	26	5
#8211	Supervisors, logging and forestry	51	-	20	-	19	19	7	-
#2223	Forestry technologists and technicians	12	36	57	14	4	4	21	5
#7312	Heavy-duty equipment mechanics	7	23	36	9	2	2	13	3
#2122	Forestry professionals	4	25	37	11	2	2	14	4
#0811	Managers in natural resources production and fishing	20	3	14	-	7	7	5	-
#8422	Silviculture and forestry workers	3	21	31	10	1	1	11	4
All Occupations in the Industry		195	618	972	244	71	226	355	89

- *Under scenario 1 – job vacancy rate assumed to be 5.0%*
- *Under scenario 2 – job vacancy rate assumed to be 7.0%*
- *Under scenario 3 – job vacancy rate assumed to be 2.8%*

Table 27 Projected Total Job Openings by Top 10 Occupations in Wood Manufacturing, Study Area, 2022 -2032

NOC	Occupation	SRD	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	RDMW	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
#9614	Labourers in wood, pulp and paper processing	4	2	5	-	4	2	5	-
#9431	Sawmill machine operators	4	1	3	-	4	1	3	-
#7311	Construction millwrights and industrial mechanics	2	1	2	-	2	1	2	-
#7452	Material handlers	1	2	3	0	1	2	3	0
#0911	Manufacturing managers	1	0	1	-	1	0	1	-
#9436	Lumber graders and other wood processing inspectors and graders	2	0	1	-	2	0	1	-
#7384	Other trades and related occupations, n.e.c.	1	1	1	0	1	1	1	0
#9215	Supervisors, forest products processing	2	-	0	-	2	-1	0	-
#9533	Other wood products assemblers and inspectors	1	1	1	0	1	1	1	0
#9434	Other wood processing machine operators	1	0	1	0	1	0	1	0
All Occupations in the Industry		20	23	42	0	20	23	42	0

- *Under scenario 1 – job vacancy rate assumed to be 4.6%; Under scenario 2 – job vacancy rate assumed to be 6.5%*
- *Under scenario 3 – job vacancy rate assumed to be 1.9%*

HEALTHCARE

Projections of potential job openings, along with scenario analysis, are presented in tables 28, 29, and 30.

In Table 28, the underlying assumption of employment projection in ambulatory healthcare services in the study area is that average annual employment growth rate in the ambulatory health care services will be the same as those for the industry in Vancouver Island / Coast Development Regions, that from 2022 to 2027 it is 1.7% per year, and 3.1% per year from 2027 to 2032. Replacement demand adds extra job openings.

Similar to the projection of job openings in the forestry sector, we present additional job openings based on assumed job vacancy rates.

- The first is based on the average job vacancy rates for industries for the province in the most recent past – six quarters from 2022 to the second quarter of 2023;
- The second is based on the highest job vacancy rates for industries for the province – for most industries it was the second quarter in 2022; and
- The third is based on the five-year average job vacancy rates for industries for the province prior to the pandemic – five-year average from 2015 to 2019.

In Table 29, underlying assumption of employment projection is that average annual employment growth rates in hospital services in the study area are the same as those in Vancouver Island/Coast Development Region: that from 2022 to 2027 the rate is 1.1% per year, and 1.0% per year from 2027 to 2032. Replacement demand adds extra job openings.

In Table 30, underlying assumption for employment projection is that average annual employment growth rates in the nursing and residential care facilities in the study area are the same as those in Vancouver Island/Coast Development Region: that from 2022 to 2027 rate is 4.9% per year, and rate is 2.0% per year from 2027 to 2032. Replacement demand adds extra job openings.

Table 28 Projected Total Job Openings by Top 10 Occupations in Ambulatory Health Care Services, Study Area, 2022-2032

NOC	Occupation	City of CR	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	SRD	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	RDMW	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
#3012	Registered nurses and registered psychiatric nurses	39	-	3	-	49	-	4		8	-	1	-
#1414	Receptionists	31	-	5	-	39	-	6	-	6	0	1	-
#3112	General practitioners and family physicians	26	-	1	-	33	-	1	-	5	-	0	-
#3413	Nurse aides, orderlies and patient service associates	24	-	2	-	30	-	2	-	5	0	0	-
#3411	Dental assistants	18	0	4	-	23	1	5	-	4	0	1	-
#3236	Massage therapists	20	-	0	-	25	-	1	-	4	-	0	-
#4412	Home support workers, housekeepers and related occupations	17	-	0	-	22	-	0	-	4	0	0	-
#3111	Specialist physicians	16	-	1	-	20	-	1	-	3	0	0	-
#4212	Social and community service workers	16	-	1	-	20	-	1	-	3	0	0	-
#1221	Administrative officers	17	-	-3	-	21	-	-4	-	4	-	-	-
All Occupations in the Industry		425	-	32	-	529	-	40	-	87	-	7	-

- *Under scenario 1 – job vacancy rate assumed to be 4.2%*
- *Under scenario 2 – job vacancy rate assumed to be 4.9%*

- *Under scenario 3 – job vacancy rate assumed to be 2.7%*

Table 29 Projected Total Job Openings by Top 10 Occupations in Hospital Services, Study Area, 2022-2032

NOC	Occupation	City of CR	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	SRD	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	RDMW	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
#3012	Registered nurses and registered psychiatric nurses	126	85	155	-	156	106	193	-	26	18	32	-
#3413	Nurse aides, orderlies and patient service associates	35	24	43	-	43	29	53	-	7	5	9	0
#3233	Licensed practical nurses	21	15	27	0	26	19	34	-	4	3	6	0
#1411	General office support workers	20	13	24	-	25	16	30	-	4	3	5	0
#6731	Light duty cleaners	9	9	15	1	12	11	18	1	2	2	3	0
#3111	Specialist physicians	9	5	10	-	11	7	13	-	2	1	2	0
#6711	Food counter attendants, kitchen helpers and related support occupations	4	9	13	3	6	11	16		1	2	3	1
#3215	Medical radiation technologists	8	5	10	0	10	7	12	0	2	1	2	0
#3211	Medical laboratory technologists	9	4	8	-	11	5	10	-	2	1	2	0
#1414	Receptionists	6	5	9	0	8	6	11	0	1	1	2	0
All Occupations in the Industry		362	248	450	-	451	309	560	-	74	51	93	-

- *Under scenario 1 – job vacancy rate assumed to be 5.4%*
- *Under scenario 2 – job vacancy rate assumed to be 7.1%*
- *Under scenario 3 – job vacancy rate assumed to be 3.2%*

Table 30 Projected Total Job Openings by Top 10 Occupations in Nursing and Residential Care, Study Area, 2022-2032

NOC	Occupation	City of CR	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	SRD	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	RDMW	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
#3413	Nurse aides, orderlies and patient service associates	109	5	21	-	136	6	26	-	22	1	4	-
#4212	Social and community service workers	40	1	7	-	49	1	8	--	8	0	1	-
#3012	Registered nurses and registered psychiatric nurses	25	1	5	-	31	1	6	-	5	0	1	-
#3233	Licensed practical nurses	20	1	4	-	25	1	5	-	4	0	1	-
#6711	Food counter attendants, kitchen helpers and related support occupations	14	6	8	-	17	7	10	-	3	1	2	-
#4412	Home support workers, housekeepers and related occupations	17	0	2	-	22	0	3	-	4	0	0	-
#6731	Light duty cleaners	13	2	4	-	16	2	5	-	3	0	1	-
#6322	Cooks	12	2	4	-	15	2	4	-	3	0	1	-
#6733	Janitors, caretakers and building superintendents	6	0	1	-	7	0	1	-	1	0	0	-
#0311	Managers in health care	7	-	-	-	8	-	-	-	1	0	0	-
All Occupations in the Industry		348	15	65	-	433	18	81	-	72	3	13	-

- *Under scenario 1 – job vacancy rate assumed to be 5.5%*
- *Under scenario 2 – job vacancy rate assumed to be 6.2%; Under scenario 3 – job vacancy rate assumed to be 2.4%*

TOURISM

Employment projections from 2022 to 2032 are based on the following:

- That employment change in 2022, 2023, 2024, and 2025 have been derived according to the report *"BC Tourism and Hospitality Labour Market Information (LMI) Research Project"* (in Table 28); and
- That from 2025 to 2032, annual employment is projected to grow at an average rate of 1.6% on Vancouver Island, which was the annual growth rate during the period of 2011-2019.

Similar to the projection of job openings in other sectors, we present additional job openings based on assumed job vacancy rates:

- The first is based on the average job vacancy rate for accommodation and food services for the province in the most recent past – six quarters from the first quarter in 2022 to the second quarter of 2023;
- The second is based on the highest job vacancy rate for accommodation and food services for the province –the second quarter in 2022; and
- The third is based on the five-year average job vacancy rate for accommodation and food services for the province prior to the pandemic – five-year average from 2015 to 2019.

The resulting projected total job openings, along with any additional ones depending on the scenario, are presented in Table 31.

Table 31 Projected Total Job Openings in Tourism by Top 10 Occupations in the Study Region, 2022-2032

NOC	Occupation	City	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	SRD	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional	RDMW	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
6711	Food counter attendants, kitchen helpers	84	268	374	133	113	357	498	177	22	71	99	35
6322	Cooks	58	125	181	55	78	167	241	73	15	33	48	15
6513	Food and beverage servers	49	128	181	61	65	171	242	81	13	34	48	16
0631	Restaurant and food service managers	48	55	86	16	63	73	115	21	13	15	23	4
5254	Program leaders and instructors in recreation, sport and fitness	19	49	69	23	27	71	101	34	6	16	23	8
6311	Food service supervisors	28	57	83	24	38	76	110	32	7	15	22	6
6511	Maîtres d'hôtel and hosts/hostesses	16	53	74	27	21	71	99	36	4	14	20	7
6321	Chefs	20	46	66	21	27	61	88	27	5	12	17	5
7513	Taxi and limousine drivers and chauffeurs	19	42	60	19	28	61	87	27	10	21	30	9
7512	Bus drivers, subway operators and other transit operators	20	34	50	13	29	49	72	19	10	17	25	7
All		850	1,403	2,081	541	1,169	1,931	2,864	744	272	449	666	173

- *Under scenario 1 – job vacancy rate assumed to be 9.7%*
- *Under scenario 2 – job vacancy rate assumed to be 12.2%*
- *Under scenario 3 – job vacancy rate assumed to be 6.2%*

In summary, the estimated employment by sector in the study area and the projected 10-year job openings show the challenge and opportunities the communities in the study area have to face.
In aquaculture, public policy and regulatory changes regarding salmon farming affected employment estimates in 2022 for the study area, especially Strathcona Regional District. Moving forward, employment growth rates and the resulting 10-year projection of job openings are somewhat depressed. However, if RAS and the mariculture sector develop quickly with technology and innovations, they can bring in more employment opportunities.

Foresty and logging, as well as support services, have experienced a long-term decline in coastal communities. Moving forward, the sector may still experience more contraction. Job openings are expected to come from replacement needs.

Healthcare is a major employer for the study area and it is already an area where labour shortage is acute, as reflected by job vacancy rates. (Due to data limitation, job vacancy rates in industry are for the entire province. And it is observed that healthcare sector has some of the highest job vacancy rates amongst all industries.) There will be reasonably strong employment growth over the years during the next 10 year period, driven by population growth. Resulting job openings will present great challenges for recruitment and retention.

The tourism sector is a major employer in the study area and offers many job openings during the 10 year forecast period, even more so when we examine the potential job positions to fill under certain scenario analysis. Challenges to recruitment and retention will be most substantial.

Table 32 Estimated Employment in 2022 and Projected 10-Year Total Job Openings in the Study Area (Strathcona Regional District & Regional District of Mount Waddington Combined)

Sector	Est. Employment 2022	10-Year Total Job Openings	Scenario 1 additional	Scenario 2 additional	Scenario 3 additional
Aquaculture	1,053	362	205	403	-
RDMW	411	141	80	157	-
SRD	642	221	125	245	-
CofCR	595	205	116	227	-
Forestry	2,459	306	890	1,411	333
RDMW	701	91	249	397	89
SRD	1,758	215	641	1,014	244
Healthcare	3,327	1,646	381	794	-
RDMW	472	233	54	113	-
SRD	2,855	1,413	327	681	-
CofCR	2,294	1,135	263	547	-
Tourism	3,249	1,441	2,380	3,530	917
RDMW	613	272	449	666	173
SRD	2,636	1,169	1,931	2,864	744
CofCR	1,915	850	1,403	2,081	541

3.4 Qualitative Labour Market and Talent Data, Talent Challenges and Opportunities

The City of Campbell River and others have been focusing on future work, namely the industries and occupations that will thrive as technology advances. This will generate a need for a different and broader skill set than has previously been the case. It is essential that employers be involved in determining what those skills will be. On the job training should be provided where possible and supported. Close liaison with educational institutions must be maintained so that they can adjust their offerings to upcoming requirements. Connections with secondary schools need to be established and encouraged to ensure that appropriate learning is offered, and students are advised of which training will best lead to success in their future careers.

3.4.1 TALENT CHALLENGES

Right now, the biggest labour market challenge for BC and right down to the sub regions is the lack of labour supply. Our research has indicated that this is not a new problem and, if positive action is not taken, it is likely to continue into the future.

Currently in BC as a whole, the number of vacant jobs exceeds the number of unemployed workers. The problem becomes more serious as we look at specific industries and smaller geographical areas. For example, mariculture has excellent growth potential, but maintaining and especially growing a labour force as the industry expands is challenging.

In addition to market access, exchange rates and other issues that the forest industry has always had to deal with, it must now ensure that it is proceeding in an environmentally sustainable way. And tree planting which is a major component of sustaining forests is one of the hardest activities to staff. Geographically, population and labour force growth in RDMW has been negligible. This is inconsistent with a growing economy.

Another barrier to attracting workers is housing, both the cost and the quantity. Especially in the city of Campbell River, housing prices have been increasing. This has not been a problem for newcomers from larger centres where prices are even higher, but it does make homes less affordable for just about everyone else. In places in the study area other than Campbell River, prices are less of an issue. However, there are too few homes available to meet the needs of a growing population.

Data from local labour market experts provides a glimpse of the challenges to local employers in the northern part of Vancouver Island. According to the *Report of NIEFS Job Postings Database - Labour Market Partnership Information – (Q2) – July – September 2023*,[34] average monthly job postings shown from the NIEFS database in the current year (November 1, 2022 to October 31, 2023) is at an all time high, at 508. This is almost double the number in 2019 when average monthly job postings was 264.

[34] North Island Employment Foundation Society (NIEFS). (2023). Labour Market Partnership Information – (Q2) – July – September 2023

Most of these posted jobs are of good quality, i.e., full time positions accounted for almost two-thirds (64%) of all postings.

During the five-year period (November 1, 2018 to October 31, 2023), top industries with job postings were:

The top industries for job postings this period were:

- Tourism/Hospitality = 15.4% (3207 postings)
- Forestry = 15.3% (3189 postings)
- Other Business Services = 14.4% (3003 postings)
- Construction/Trades = 13.8% (2887 postings)
- Social Services = 9.6% (2010 postings)
- Retail/Wholesale = 7.5% (1557 postings)

3.4.2 TALENT OPPORTUNITIES

As our analysis has shown, the fastest growing component of the population is Indigenous. Much of the best work in developing wise practices and plans for industry and career development have been done by the Nations. What is now needed is the actual implementation of these practices and plans along with a deeper integration between First Nations and the rest of the population.

In government structures, aquaculture and its components are subsumed under agriculture. The difficulties of attracting sufficient Canadians to work in land-based agriculture has been recognized by implementing programs that admit temporary foreign workers. Such programs should be extended to aquaculture and other uncovered sectors facing labour shortages.

Employers often cannot find appropriately trained and job ready workers. Young people often have trouble integrating into the labour market. The opportunity exists for employers to become more involved with students in high school and beyond, telling them about the world of work, advising what skills and occupations will be in demand and offering part time and summer jobs to both Indigenous and other youth. Taking steps to increase the supply of locally available training is another opportunity for communities.

As the C.D. Howe Institute study shows, providing work experience opportunities to students leads then to more successful careers and may also encourage them to remain in the community.[35] The potential advantages to employers are obvious.
As noted in the bibliography, much excellent material has been produced about the advantages of Campbell River, SRD and MWRD. However, it is barely visible outside the regions. In an age of information overload, having material and websites available is necessary but not sufficient to attract newcomers. 'Ambassadors' have been used to go out and actively recruit needed professionals and others. They could be used again.

Active marketing can now target a new group of in-migrants: the work from home crowd. The pandemic has taught us that work is not a place. Many people who are self employed and/or whose physical presence is not required for what they do can live anywhere. An active campaign (more than just a website) may attract them.

As they are implemented, the ideas just described as well as elsewhere in this report can go a long way to alleviating talent shortages.

Top Recruitment and Retention Issues Among Key Sectors in the Campbell River and North Island Labour Markets Overall

Unexpected events like a pandemic, changing economic conditions like a recession or a boom and new government policies such as the BC government's future ready action plan can impact the relevance and effectiveness of strategies that have been based on information that has become out of date. Information about the economies and labour market needs to be kept up to date and systems and resources should be in place to ensure this.

Current and future labour market information will show that the demand for labour exceeds supply across occupations, industries and geographic areas. This historically unusual condition in the labour market means that attracting workers has become very competitive requiring increasing amounts of positive action. It must also be recognized that NVI will be competing with other regions for the same human resources.

Much information and many strategies and wise practices have already been put forward on how to attract people such as doctors and how students and other groups, including Indigenous people, can get the training they need and establish good careers in needed fields. However, they have not been effectively implemented. The lack of sufficient human and financial resources often stands in the way of putting plans, strategies and practices into action. First Nations are developing a growing presence in the economy of the region, often in fields like tourism and aquaculture that are central to this report. Respectful and effective relations with Indigenous nations are needed; government to

[35] Wyonch, R., & Seward, B. (2023). From Class to Career: How Work Integrated Learning Benefits Graduates Looking for Jobs.

government, business to business, employer to employee and person to person for the mutual advantage of all who live in the region.

Some issues are especially complex because many organizations and levels of government must be involved.

Housing and community services are two such areas. Homes and community amenities must be available and competitive with other regions both to attract and to retain population.

Since communities across BC and beyond are facing similar labour shortages and are trying to attract workers, the advantages of NVI must be much more visible and actively presented, ideally in person. The advantages of NVI are not sufficiently disseminated. Plans must be put into place to do better if the region is to attract and keep its share of workers. Passive presentations (e.g., websites) are not enough.

<u>Aquaculture</u>

The seasonal nature of much work in aquaculture makes it difficult to attract and retain non-local staff.

By its very nature, ocean-based aquaculture has to be on the coast, often in remote locations to which many outsiders are not attracted.

Unless replaced by mariculture and RAS, the possibility of removing licenses for fin fish aquaculture in NVI could have serious negative repercussions.

Mariculture (the collection and/or growth of water-based plants) offers many positive possibilities.

Growing and/or harvesting seaweed as an export, a food source and for other uses offers excellent economic opportunities in the study area.

Many First Nations are already key players in aquaculture and can contribute in their own businesses and by working with others.

<u>Forestry</u>

In addition to the on-going issues such as timber supply and access to the US market, this sector must now build environmental sustainability into its operations in a way that allows it to continue to be economically competitive.

Maintaining sustainable forests is essential, but must be done in such away that it does not affect our competitiveness especially with international producers who are ignoring the longer-term issues.

Indigenous cultural issues such as dealing with modified trees need to be taken into account. First Nations and employers must work together to provide jobs for the former and a workforce for the latter.

<u>Healthcare</u>

Use must be made of the resources, toolkits and promotional materials produced by the Campbell River division of family practice and others.

The new BC Future Ready Action Plan will help to attract and retain people from outside the area and the country, especially by making it easier for people who are here and those who are thinking of coming to be able to practice their professions. The *Health Professions and Occupations Act* should also contribute.

Medical & Healthcare Career Expo

On November 22, 2023, seventy-two healthcare practitioners, recruiters, jobseekers and stakeholders came together for four hours of dialogue and information sharing at this virtual event.

There are people who would have not considered this region, that are now investigating and inquiring, therefore we feel the overall purpose was met. Furthermore, the one international attendee also found it very useful, therefore, helping to unlock those markets would be an asset.

The platform worked well, and the content was very well received. In terms of structure, it is recommended to have some sessions run concurrently to avoid the risk of attendees opting completely out as one session may not be of direct interest to them.

We believe there is merit and value in continuing with this type of recruiting and retention effort. The marketing was challenging and therefore it is recommend having a dedicated marketing person for future events.

Direct contact with schools did not prove fruitful during this event, yet the students that were at the event found it incredibly beneficial.

Our findings from this Career Expo experience are:

1. Some attendees reached out as they were excited and eager to get contact information for the panelists (e.g., an attendee in Nanaimo reached out to one panelist's employees in Port Hardy during the Expo asking about opportunities.)
2. We heard that more opportunities to recruit could emerge from the U.S. as some hospital regions will be consolidating. Also, our physician remuneration structure is historically more closely matched to the U.S. model.
3. International candidates are interested in getting good, permanent positions, so additional efforts could be considered. (i.e., Provincial Nominee Program, the federal International Mobility Program, etc.).
4. People can and do engage on an online event like this forum which worked well for both recruiting as well as retention as we received excellent feedback from both job seekers as well as employed professionals.
5. There are people who would consider relocating to this region and join the healthcare sector.

<u>Tourism</u>

As in aquaculture, seasonality makes it difficult for this labour-intensive sector to attract staff, especially from outside the area.

Also, tourism has the not always justified reputation of paying low wages. Opportunities for advancement and better pay in this sector need to be better known.

As in aquaculture, tourism locations can be remote. This is especially true for the unique products that Indigenous tourism can offer.

The many excellent and unique opportunities for Indigenous tourism are well covered in the literature. The challenges they face such as attracting and keeping staff are also well documented. Wise practices have been put forward to deal with these. Strategies need to be developed to effectively implement these practices.

There are recommendations in this report to deal with these issues.

3.5 Other Research Findings

Certain barriers affecting the workforce and employment came up repeatedly in our research. They are described below with examples of the source documents.

Skill shortages

The lack of a sufficient quantity of workers to fill current and future openings has been documented in the BC Labour Market Outlook.[36] It is not only that the quantity of workers is lacking. There is also the issue of workers lacking the skills that employers and businesses require. Skill shortages have existed for a long time as noted by Rutley and Rutley[37] and across many industries including, but not limited to technology,[38] the marine sector[39] and the forestry sector.[40]

Employee expectations

Given the surplus of job openings relative to those who are unemployed one would expect job seekers to be satisfied with the current labour market. However, this is not the case. A survey by the Chamber of Commerce[41] shows that the expectations of job seekers are not being met with respect to salary levels, working conditions and the location of jobs.

Lack of local training

In some sectors, the best prospects for getting and keeping workers is to rely on the local populations.[42] However to work in technology[43,44] and the future industries that Campbell River and other communities are looking to for growth, local people will need additional skills. These are the very people that would be most reluctant to leave town for training. Locally available training, virtual or otherwise would lower this barrier.

Industry connections to secondary schools

When graduating from high school, many labour force entrants are not aware of the realities of the world of work and the opportunities that exist. This lack of connection between the business community and the schools has been prominently noted in the tourism sector,[45] but it applies more

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[36] Government of British Columbia. Ministry of Post-Secondary Education and Future Skills. (2023). British Columbia Labour Market Outlook: 2022 Edition.
[37] Rutley, B.D. and R.D. Rutley (2006). North Island Post Secondary Education Needs Assessment. An unpublished report to the North Island Post Secondary Education Committee of the Regional District of Mount Waddington, Port McNeill BC.
[38] Harbour Digital Media. (2016). Labour Market Partnership: Phase 2 – Final Labour Market Information Research Report.
[39] Human Capital Strategies. (2019). An Assessment of Marine-Related Sector Training & HR Needs on North Vancouver Island – Marine Plan Partnership (MaPP) Final Report.
[40] LMI Insight and R.A. Malatest & Associates, Inc. (2013). British Columbia Forest Sector Labour Market & Training Needs Analysis.
[41] Ministry of Social Development and Poverty Reduction and BC Chamber of Commerce. (2023). Addressing the Labour Market Gap: Insight Report.
[42] MQO Research. (2018). Labour Market Analysis of the Newfoundland and Labrador Aquaculture Industry. Prepared for the Newfoundland Aquaculture Industry Association (NAIA). First Nations Technology Council, Information and Communications Technology Council, Reciprocal Consulting Inc. (2022). Indigenous Leadership in Technology: Understanding Access and Opportunities in British Columbia
[43] First Nations Technology Council, Information and Communications Technology Council, Reciprocal Consulting Inc. (2022). Indigenous Leadership in Technology: Understanding Access and Opportunities in British Columbia.
[44] Harbour Digital Media. (2016). Labour Market Partnership: Phase 2 – Final Labour Market Information Research Report.
[45] go2HR; Qatalyst Research Group. (2022). BC Tourism and Hospitality Labour Market Information (LMI) Research Project.

broadly both for those seeking to hire high school graduates and those who can direct young people into post-secondary training that will lead to good local employment.

Lack of transportation

Lack of transportation is a barrier for workers and employers. It could be insufficient local public transit system as is the case in Mount Waddington as noted in a study by the Mount Waddington Health Region.[46] On a broader scale, limited air access to, from and within Vancouver Island can deter both residents and potential in-migrants.[47]

It is noted that currently, there is a limited bus service using Waving Flags: Bus service between Port Hardy, 7210 Market Street, and Campbell River, 1297 Shoppers Row, now available. The bus will run three days a week, departing from Port Hardy to Campbell River at 7 AM, then departing Campbell River to Port Hardy at 4:30 PM.

Accessibility

Closely related to transportation issues is accessibility, particularly for smaller, more remote centres and some Indigenous communities like the 'Namgis.[48] Remoteness makes it hard to attract and retain people especially when it is combined with limited housing (see below).

Connectivity

Lack of transport (moving people and things) is a well-known barrier. Lack of electronic connectivity (moving information and ideas) has now become equally limiting. This has been known for some time as the SRD report from 2017[49] shows. This report[50] notes how inadequate broadband capacity hurts NVI. Today, people tend not to move to or stay in areas without reliable Wi-Fi. Business opportunities are similarly constrained. Attracting the newly geographically unconstrained remote workers[51] is unthinkable if connections cannot be guaranteed.

[46] MWHN (2020). MWHN Transportation Needs Assessment & Strategy Summary & High Level Overview.
[47] InterVISTAS Consulting Inc. (2008). Vancouver Island and Sunshine Coast Region Air Transportation Outlook Final Report.
[48] 'Namgis First Nation and the Village of Alert Bay. (2015). Tides of Change – Cormorant Island Economic Development Strategy.
[49] Strathcona Regional District. (2017). Building Remote and Rural Community Capacity through High Speed Internet: Strathcona Regional District Broadband Study.
[50] Design Nine. (2014). Solving the Broadband Bottleneck The Regional District of Mount Waddington.
[51] Human Capital Strategies. (2021). Home Based Knowledge Worker (HBKW) Attraction Campaign Project. Prepared for Regional District of Mount Waddington.

Uncertainty regarding aquaculture

People and businesses can adapt to almost anything if they know what it is. Aquaculture has been seen as a future oriented activity generating food, exports and jobs.[52][53] However, potential conflict between farmed salmon and the smaller wild salmon catch, BC now plans to eliminate net pen salmon farming around North Vancouver Island making both business and potential workers reluctant to consider this activity in this area.

Lack of Housing

Lack of suitable, affordable, or indeed any housing is a major deterrent to attracting and keeping workers across industries and occupations and is an issue across the study region. In our research, it was most prominently indicated for the tourism sector both Indigenous[54] and other [55]. Though the problem was acknowledged, little was suggested to deal with it. Perhaps this was because it was an area beyond the scope of those who deal with labour market.

To the extent possible, all of these barriers must be addressed to provide viable, long term solutions to labour market issues.

3.6 Best Practices and Lessons Learned from Other Cases

Many best practices and lessons can be learned from work and cases outside of the study region.

As Altman et.al[56] point out and others[57] have confirmed, positions are often more easily filled when employers move beyond the traditional employer/employee full time, full year pattern. Although such positions are still desirable for some, many employers, especially in the smaller communities, find better access to highly specialized workers through remote, contract and/or part time hiring. Flexibility re scheduling and work location also helps retention.

Studies for the horticultural sector in BC[58] have shown that developing an appreciation for the industry, creating an environment that welcomes change and innovation, providing support and tools for workers and employers and involving the Indigenous community can enable a sector to prosper.

[52] BC Stats. (2012). British Columbia's Fisheries and Aquaculture Sector, 2012 Edition. Prepared for the Department of Fisheries and Oceans Canada.
[53] See BC Salmon Farmers Association website https://bcsalmonfarmers.ca/aquaculture/ and the Coalition of First Nations for Fin Fish website https://firstnationsforfinfish.ca/ for more information.
[54] O'Neil Marketing & Consulting in partnership with Brian Payer (Ojibwe), Krista Morten, Dr. Peter Williams, and Roslyn Kunin and Associates. (2021). Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21.
[55] go2HR; Qatalyst Research Group. (2022). BC Tourism and Hospitality Labour Market Information (LMI) Research Project.
[56] Altman, E.J., Kiron, D., Schwartz, J. & Jones, R. (2023). The Future of Work Is Through Workforce Ecosystems.
[57] Harbour Digital Media. (2016). Labour Market Partnership: Phase 2 – Final Labour Market Information Research Report.
[58] BC Landscape & Nursery Association and Roslyn Kunin & Associates, Inc. (2019). British Columbia Horticulture Workforce Strategic Plan.

These results could be applied to other industries. Appropriate organizations and structures must be in place to deliver results.

Expanding access to temporary foreign workers is recommended for the aquaculture sector at the national level.[59] The possibility of using TFWs could also apply to other industries.

The Conference Board of Canada has indicated how much Alberta's rural economy contributes to the province.[60] It is much higher than most would assume. It also indicates what is needed to sustain this. A similar study of NVI could help attract government and other support for development.

This website offers useful examples of what actual isolated communities are doing to retain healthcare professionals.[61] These include involving Indigenous people, offering part time work, building in work life balance and providing training.

Newfoundland is currently dealing with challenges of staffing aquaculture by taking advantage of those people who are currently in the usually remote areas where the industry is located and who wish to remain.[62]

A recent C.D. Howe document looks at work integrated learning (WIL) increases positive outcomes and better jobs for students.[63] Taking a WIL student in any capacity increases the odds of that person continuing to work with that employer and filling vacancies in the community. Educational institutions that may have been reluctant to work with employers can ensure that their students benefit from the positive results of this research by starting or enhancing WIL. Employers can work with educational institutions to encourage this.

Appendix 2 at the end of this report describes some earlier, relevant work by Human Capital Strategies from which the following best practices and lessons learned are helpful to consider:

- Take advantage of remote workers and those operating in the gig economy;
- Help develop connections among remote workers and those in similar occupations;
- Publicize co-working spaces like coffee shops;
- Outline advantages to families like schools, childcare, short commutes;

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[59] Canadian Agricultural Human Resource Council. (2021). How Labour Challenges Will Shape the Future of the 'Aquaculture' Industry.
[60] Conference Board of Canada. (2012). Alberta's Rural Communities: Their Economic Contribution to Alberta and Canada.
[61] Healthcare Excellence Canada, in partnership with the Canadian Institute for Health Information. (2023). Promising Practices for Retaining the Healthcare Workforce in Northern, Rural and Remote Communities.
[62] MQO Research. (2018). Labour Market Analysis of the Newfoundland and Labrador Aquaculture Industry.
[63] Wyonch, R., & Seward, B. (2023). From Class to Career: How Work Integrated Learning Benefits Graduates Looking for Jobs. [Commentary 642].

- Work on generating and advertising affordable housing, high speed internet connectivity and community safety;
- Announce amenities like restaurants, micro breweries and outdoor recreation on websites and elsewhere; and,
- Offer extras like weekend visits, financial and business advice and a dedicated ambassador to seek out and support new workers.

The visual below reflects the key elements of a regional or local community-based talent strategy learned from other cases studied for this project.

[1] Human Capital Strategies. Literature Review & Summary: Home-Based Knowledge Worker Attraction Campaign Project. Prepared for Regional District of Mount Waddington. March 9, 2021

3.7 Recommendations for Talent Strategies from the Project Research

The recommendations below are derived from what we have learned from our extensive research. Most will not be surprising.

However, even more important than the recommendations themselves is to have the structures in place for their effective implementation and evaluation. Employers, all levels of government (including Indigenous) and other community leaders and organizations need to define or create the bodies that will put these recommendations into action and that will evaluate the effectiveness of that action. Adequate and secure resources (human and financial) are necessary. Reporting on results is required. With these steps in place, those results should be large and positive.

The following questions must be answered for each of the recommended actions below:

- Who is to do it? (industry, community, government body, special committee, etc.)
- What will be done? (detailed action plan and strategy)
- With what resources? (human and financial from where)
- Is there evidence of effectiveness? (evaluation)

We will come back to this near the end of the report when discussing implementation.
The following are high-level and broad recommendations at this point, many of which are supported by this Project's primary research and engagement. Therefore, we will build on and come back to these later in this report.

Better disseminate the advantages of the region

Much good work has been done in Campbell River and elsewhere to describe the many advantages of living and working in the study area. However, insufficient efforts have been made to ensure that potential workers outside of the region are aware of this material. Resources need to be devoted to correcting this situation.

Work with BC and Canadian governments on issues of concern such as forestry practices and aquaculture

Primary industries are the backbone of this economy. They are subject to regulation from both federal and provincial levels of government. Officials dealing with these sectors as well as those at the political level need to be well aware of the potential economic and social impacts of any proposed or actual changes in the regulatory requirements.

Establish communication between training institutions including high schools and employers

Local graduates from high school and beyond provide scarce and valuable young workers. However, employers have said that such people are not really job ready. It falls on employers and other community leaders to maintain a close relationship with educational establishments so that graduates will be prepared and able to fill vacant jobs.

Establish communication with the government and other bodies that influence the housing supply and other community services

People do not move to areas where suitable housing is not affordable or not even available. It is up to governing bodies to provide the policy environment in which a sufficient supply of housing can be generated. Policies to consider could include building regulations, taxation, zoning and subsidies.

Improve the availability of health care (See Section 3.2.3 of this report)

Building and maintaining a solid infrastructure of health care services is vital to attracting and retaining population. However, both actual and potential residents must be aware of its existence.

Improve electronic connectivity

Continuous reliable Internet access is now as essential to prospering communities as the supply of electricity. Unfortunately, such access is not nearly as readily available, especially in smaller more remote places. Community leaders must work with internet service providers to correct this lack in as timely a fashion as possible.

Promote the career paths that are available to those who work in tourism, health care, etc.

Along with the primary industries, tourism is important to the economy of the study area and it has as much or more growth potential. However, it is particularly challenging to staff. The main sources of local labour are new graduates and Indigenous people. Both these groups have not found work in tourism attractive. Since vacancies in tourism include not only entry level positions, but also management jobs; potential workers must be made aware of these opportunities for higher wages, advancement and good careers in the sector.

Provide relevant training locally

The two issues of skill shortages and retaining local labour can both be alleviated by providing more training locally. People who are reluctant to leave the area for training become more productive and useful. The risk of those going away to be trained not coming back is eliminated. Recommendation 3 above about employers working more closely with training institutions will ensure that the training offered meets employers' needs and enables the students to build good careers in the area. Work integrated learning such as co-op programs have been seen to be especially effective.[64]

The secondary research and quantitative analysis describe a pattern of labour market challenges that is not new to the area, namely attracting and retaining a suitable and sufficient workforce. It is not only the number of workers that is lacking, but also their distribution geographically within the region and the types and levels of skills that are needed in the economy.

These challenges can be met, but they will require concerted action on the part of many parties in the communities. Some such actions as suggested by the secondary research are listed above and more, obtained from our primary research, are outlined in the latter sections of this report.

[64] Wyonch, R., & Seward, B. (2023). From Class to Career: How Work Integrated Learning Benefits Graduates Looking for Jobs.

Overall

1. Current and future labour market information will show that the demand for labour exceeds supply across occupations, industries and geographic areas. This historically unusual condition in the labour market means that attracting workers has become very competitive requiring increasing amounts of positive action. It must also be recognized that NVI will be competing with other regions for the same human resources.

2. Much information and many strategies and wise practices have already been put forward on how to attract people such as doctors and how students and other including Indigenous people can get the training they need and establish good careers in needed fields. However, they have not been effectively implemented. The lack of sufficient human and financial resources often stands in the way of putting plans, strategies and practices into action.

3. First Nations are developing a growing presence in the economy of the region, often in fields like tourism and aquaculture that are central to this report. Respectful and effective relations with Indigenous nations are needed; government to government, business to business, employer to employee and person to person for the mutual advantage of all who live in the region.

4. Some issues are especially complex because many organizations and levels of government must be involved. Housing and community services are two such areas. Homes and community amenities must be available and competitive with other regions both to attract and to retain population.

5. Because communities across BC and beyond are facing similar labour shortages and are trying to attract workers, the advantages of NVI must be much more visible and actively presented, ideally in person. The advantages of NVI are not sufficiently disseminated. Plans must be put into place to do better if the region is to attract and keep its share of workers. Passive presentations (e.g., websites) are not enough.

4. SPECIFIC PRIMARY RESEARCH FINDINGS & RECOMMENDATIONS

The project's primary research revealed consistent themes that are similar to and complement and build on the findings of the secondary research summarized in the previous section. These include the following based on the online survey of employers, workers, jobseekers and other community members, seven sectoral focus groups and over forty key informant interviews of stakeholder and First Nation representatives.

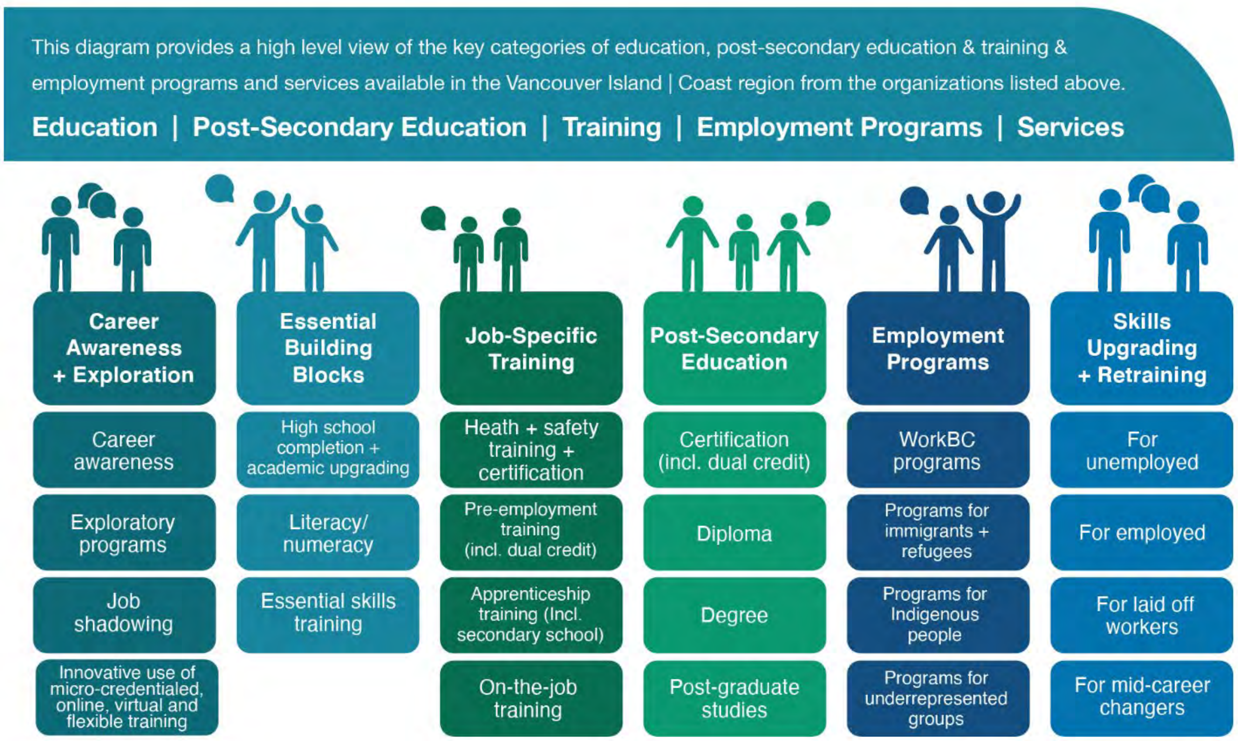
Common (Cross-Sector) Findings

1. Government policies impacting operations are a common concern across the three sectors – aquaculture, forestry, and healthcare. Clear strategies, directions, transition plans from both provincial and federal governments are required for effective workforce planning and management.
2. Housing constraints are a shared challenge among the four sectors studied.
3. Health, education, childcare, recreation, and community services are important factors for attracting new and retaining current workers across all four sectors.
4. Retaining regional youth in the two regions and all four sectors is critical for building sufficient talent pool.
5. Promoting the regions and the lifestyles they offer is one of the common solutions in attracting new workers.
6. First Nations engagement across both regions and within the four sectors is critical.
7. Improving First Nations participation is necessary to find common ground and build effective collaborations.
8. Improving communications with First Nations to better understand and align current and future needs and priorities.
9. All four sectors have the need for stronger government supports for regional economic development
10. Both regions and all sectors require a 'good narrative' and a 'strong image' to effectively communicate their positive experiences, contributions and future potentials.

From the research and engagement, some general themes emerged. These included an emphasis around the need for better communication with governments, with educational institutions, with potential workers, and with students and those outside the area.

Improving the overall economic and social environment is also important. This includes transportation, electronic connectivity, housing and childcare. These themes were enforced by our primary research. Also, see the Best Practices and Lessons Learned earlier in this report and in Appendix 2.

It will be important for education, training and employment program providers to work closely with employers and industry groups, employees and jobseekers, First Nations and other communities and private and public funders to offer a responsive and work-based array of programs in the regions in coordinated, collaborative and results-oriented ways. This will need to include innovative use of online, micro-credentials, community-based, sector specific, culturally sensitive and flexible models for skills and employment development.



Unique (Sector-Specific) Findings

1. The tourism sector faces challenges with seasonal operations and its impact on hiring.
2. The tourism sector experiences longer periods of sourcing and interviewing candidates and filling the openings.
3. The tourism sector faces workforce competition with the forestry and other sectors in BC and AB offering higher compensations.

4. The tourism sector indicates available small business and skills development government grants need to be better aligned with tourism operations and seasonal specifics to ensure better workforce and business outcomes.
5. Healthcare workers in the region experience a high level of burnout. There is a need for wellbeing programs.
6. Healthcare workers, especially new hires, would benefit from direct HR supports within their organizations.
7. The aquaculture sector faces image-related issues, public perception, and opposition.
8. The aquaculture sector would benefit from data-based communication campaign to enhance the impact of the sector and raise its profile.
9. First Nations tourism products and services are unique to the sector and have potential for growth but support in community-based training and skills transfer is needed.
10. Making the Canada Summer Job Program more flexible to meet the needs of businesses (tourism, forestry) who have needs beyond summer.
11. The forestry's sector workforce planning and preparation success heavily relies on government policies. The sector needs more stability in policy development and implementation to ensure effective workforce planning.

Findings Regarding First Nations and Other Indigenous Organizations and Indigenous Workers

First Nations organizations are growing fast in employment opportunities, particularly in healthcare, resource sectors and tourism, and their operations need to expand capacity to keep up in terms of education and training and preparing members for employment and advancement.

Many First Nations are located in remote/rural locations and this reality must be addressed in training and employment strategies. On the other hand, the remote location provides opportunities in sectors based in their territories such as aquaculture and forestry. Any strategy to increase Indigenous economic and skills development must include flexible, customized, community-based and culturally appropriate design and delivery.

A Campbell River & North Island workforce strategy must also reflect true reconciliation, UNDRIP and *Declaration on the Rights of Indigenous Peoples Act* principals, First Nations' interest in ownership and equity (e.g., entrepreneurship training) and the importance of "free, prior and informed consent" and partnership-, relationship- and trust-building.

We heard from most First Nations that they are getting inundated with requests to engage with them; they are getting increasing requests from various levels of government and industry (all key sectors) to engage; and First Nations have limited capacity for accommodating such engagement.

Most of the occupations identified in demand are in healthcare, resource-based and service sectors:

- Service jobs in retail, accommodation, and tourism (e.g., entry level, cooks and chefs, tour/wilderness operators, housekeeping, front desk, maintenance, etc.);
- Resource-based jobs in forestry/logging, construction, wood manufacturing and fish farming occupations, including labour, skilled and technical;
- Healthcare jobs in nursing (including LPNs) and healthcare aids, physiotherapists, mental health workers, addiction counsellors, midwives, etc.; and,
- Also, career advisors and administrative positions.

First Nations and other Indigenous organizations we engaged with confirmed the following needs or barriers regarding attraction, recruitment, training and employment:

- A lack of affordable housing, a lack of adequate, flexible childcare, incomplete K-12 education, a lack of appropriate healthcare were most frequently mentioned as barriers to finding and keeping Indigenous talent, especially in smaller and remote areas;
- Inadequate access to childcare and eldercare (i.e., difficulty being able to work or train because of caring for aging parents);
- Transportation, especially in remote areas (e.g., no bus service between Campbell River and remote towns);
- Understanding intergenerational trauma and family trauma and culturally appropriate supports;

- While some reported offering sizable compensation including benefits and relocation assistance, infrastructure like housing and healthcare are bigger obstacles;
- Others Indigenous employers found it challenging to offer a living wage to new entrants and more than very basic benefits;
- Recruitment and training barriers are more acute for organizations in remote areas;
- Financial barriers include living costs, tuition, other costs of training working and childcare; and,
- Some application/hiring processes are not culturally appropriate and applicants/ candidates need supports to succeed in going through them

Best practices were heard of from First Nations and other Indigenous representatives included the following:

- Special attraction efforts are needed to find people who like to live and work in remote areas;
- Family connections and mentors are important;
- Sponsorship of apprentices with Red Seal standards, good wages and benefits;
- Being near traditional lands is important;
- Need to show youth growth and upward mobility opportunities ("careers");
- First Nations/public/private training partnerships;
- Workplace flexibility (e.g., hours schedule, length of day, less days, outside of regular hours); and,
- Housing strategies/programs by municipal governments (e.g., City of Campbell River).

In terms of suggested strategies and future directions to address talent challenges in their communities, First Nations' and other Indigenous organizations' offered the following;

- Flexible training in terms of location, small pieces and scheduling;
- Healthcare incentives and bonuses of the province;
- Tax credits for housing in remote areas (similar to the Northern Living Allowance);
- Recruitment of healthcare workers;
- Expand trust and equal partnerships among First Nations and industries;
- Local economic development should involve/be supported by First Nations;
- Consider progressive agreements involving hiring of Indigenous people on projects;

- In-community training for jobs and incentives for job readiness programs;
- A partnership for training opportunities with collaborative training among First Nations and others; each community is unique and needs a tailored, collaborative model; and,
- Support to people who left their community for training and/or employment (i.e., increase school or workplace capacities to support them in culturally appropriate ways).

What We Heard – The Regional Talent Summits

The Project Partners believed it would be useful to have a meeting of all interested parties in both the north part of the region and the south part. These "Summits" were intended to have the project consultant present draft solutions and recommendations for feedback as a last step before completing the project final report.

There was a solid turnout at both Summits in Campbell River and Port Hardy on October 17th of 2023. Participants appeared well-engaged throughout each event and almost all stayed to the end. Both Summits were opened with a traditional welcome and land acknowledgement by First Nations representatives: In Campbell River, June Johnson, Elder, Wei Wai Kai First Nation; and in Port Hardy, Hereditary Chief David Knox, Kwakiulth First Nations.

The keynote speaker, Todd Hirsch, provided a thought-provoking presentation, "The Drivers of Disruption: Navigating the Uncertain Economy of 2024." This evoked an engaging Q & A discussion and foundation for the rest of the Summit. His response to, "How industries in the regions can navigate these volatile, unpredictable, complex disrupters":

1. Know who you are, what you're good at, bad at, etc. (can everyone articulate the same story?)
2. Relationships - how to pivot and reinvent (be a successful adaptor)….Build relational trust; How to trust your team (relational trust); trust your competitors (tie life rafts together) and trust clients.
3. Be prepared for anything - scenario planning (company, industry, region).
4. Show Up! Don't have to knock it out of the park….show up with kindness.

Each sector panel of four representatives and a moderator involved insightful presentations on talent solutions and led to much interaction among panelists and with Summit participants. There were many potential solutions identified by panelists and generated through discussion with the audience at both Summits. Thank you to Mary Ruth Snyder (Campbell River & District Chamber of Commerce) and Chris Callanan (NIEFS) for doing a great job of moderating the Summit panels in Campbell River and Port Hardy, respectively.

Thank you also to the eight panelists who each did a great job at the Summits; we had representatives from Grieg Seafood, Western Forest Products, the First Nations Health Authority, the Campbell River Adventure Tours Group, K'awat'si Economic Development Corporation, Lemare Lake Logging, Island Health and Guido Café.

Examples of panelist comments on the four sectors:

- "Huge opportunity to be creative and find new ways to do things…innovate to get people into the industry. Finfish is year-round but faces political uncertainly and public opinion. Myths and untruths…folks don't understand the opportunity."
- "Forestry has a great story to tell, it's not always out there. The forestry industry can play a part in climate change; responsibility in everything we do today. Employees can be proud of the sustainability…get that story out to youth, into schools. Shifting the narrative and getting that message out - It's not an industry on the decline, as everyone is saying."
- "Accessing local training and education; encourage and invite more local training for forestry and across the board. Not everyone can go to large urban centres for training….look at micro-credentialing."
- "Collaboration is huge; nations are small and in really remote places; don't need a full time person doing just one job… need six different hats, so partnering nation to nation and/or with the other Health Authorities."
- "Pointing out how a vibrant and strong tourism economy can be a solution for all the different industries….a great experience may mean visitors return as employees, encourage friends to come as employees."
- "Education and training: realign education calendar toalign with tourism calendar."

Each Summit ended with inviting participants to complete a Talent Solutions comment/rating form. From completed Talent Solutions forms, key themes included:

- Consulting on and streamlining government policies and regulation which impact key sectors.
- Housing – local government regulation/bylaws - flexibility; rentals; short-term housing.
- Partnerships with and inclusion of First Nations.
- Connecting with youth, K-12 curriculum, visits to industry, etc.
- Supporting existing digital connectivity initiatives.
- Year-round job opportunities and support.
- Bolder, sustained community attraction strategies.

- Sectors and communities working together on common needs and solutions.
- Transportation to better connect communities and improve mobility and commuting.
- Attracting young professionals.

Both sector-specific and cross-cutting solutions were identified at and after the Summits and this is reflected in the Findings section of this report.

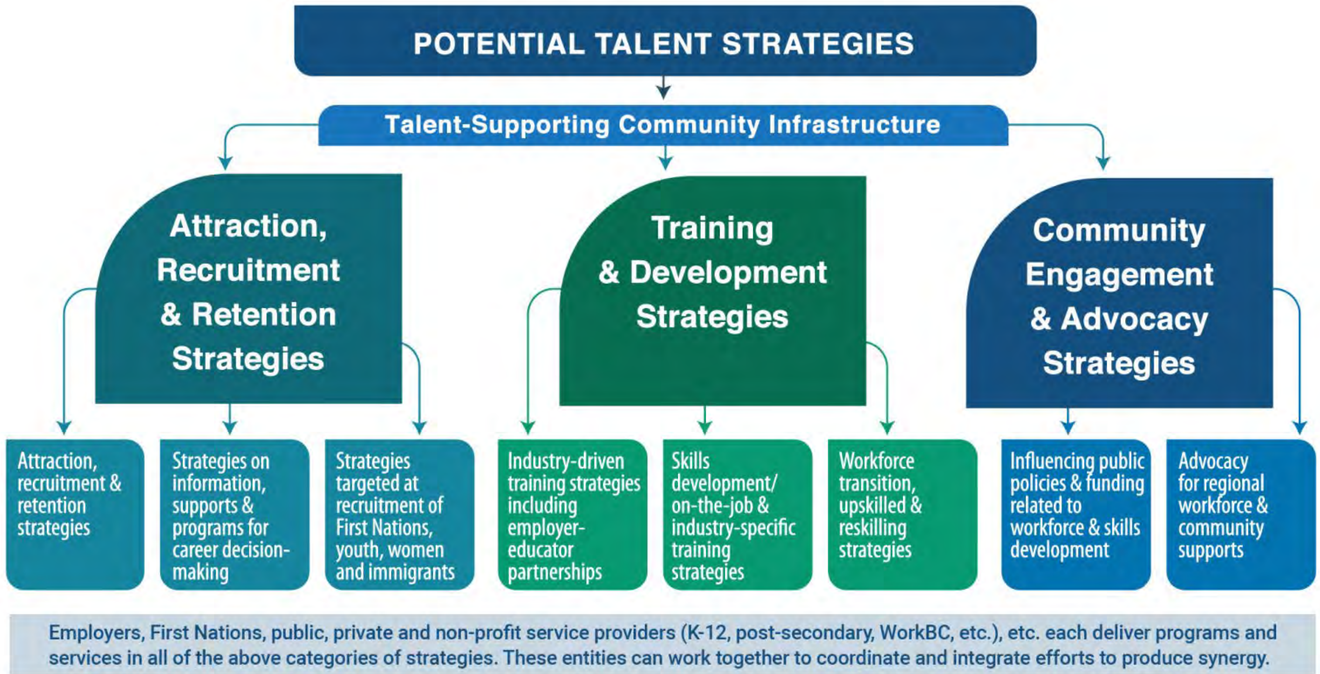
Potential Solutions and Opportunities for Action: What We Heard & What We Suggest

A key finding in the Project research and engagement is the importance of key players in the region working together in a collaborative and coordinated way. One of our broad and important recommendations for addressing talent priorities is to consider nurturing a true and really effective 'workforce development ecosystem.'

A workforce development ecosystem, in the context of this Project, is a regional structure that encompasses entities from within the region and beyond, who each attempt to create value for their organizations, clients and the region (in this case, workforce development outcomes). Within this ecosystem, the entities work toward individual and collective goals with interdependencies and complementarities among themselves.

Key to this ecosystem are: 1) major providers of programs and services (e.g., NIEFS, North Island College, North Vancouver Island Aboriginal Training Society, WorkBC, etc.); and 2) organizations with community and regional mandates for jointly planning workforce development programs (e.g., Campbell River Learning Council, Vancouver Island North Training & Attraction Society, etc.).

Overall, there are three layers of challenges and opportunities for action indicated by the primary research and engagement and complemented by the secondary research, regardless of sector or geographic area.



A. The first layer are community and provincial infrastructure, namely, affordable housing, childcare, healthcare, transportation and community capacity and assets.

B. The second layer are broader cross-sector options for solutions which will benefit employers and others in various sectors and regions.

C. The third layer are sector-specific solutions for more and more effective workforce strategies, programs, services, supports and financial resource.

The regions studied in this project represent a unique economic and social system that contributes to the prosperity of the province. It is a vibrant diverse community where traditional ways of life and modern work intersect. The research showed that in these regions, people view their jobs and services not just as tasks, but as a critical part of building local communities that support individuals, families and neighbourhoods. To ensure continued growth and prosperity in the regions, it is critical to address identified workforce challenges and opportunities holistically. This requires an integrated strategy that incorporates key aspects such as people and wellness, housing, community, transportation, education, technology, health, and childcare.

The recommendations below for workforce strategies can be tailored for the sectors, communities, and diverse demographics involved. Some strategies and suggestions overlap, demonstrating their interconnectedness. While there are many recommendations, it is essential to start with foundational aspects identified by this research, such as housing, healthcare, and social/community services to ensure workforce actions can be implemented effectively.

A) Strategies for Regional and Community Talent-Supporting Infrastructure

Our conclusion by the end of the research and engagement for this project regarding these "big" issues which impact talent attraction, recruitment, retention, skill development, etc. is that a combination of financial and other resources, working together well and regional and local attractiveness are needed.

As one focus group participant stated, "we need to rewrite our story" – we need to position the regions and communities as a uniquely attractive destinations in which to live, work and play – for employers and workers, for youth and students, for families and retired persons, for Indigenous and disadvantaged people and for others.

Many communities and many sectors in BC are experiencing the same talent challenges. One way for regions and communities of the North Island to compete for talent is communicating far and wide what they offer the potential resident, worker, professional, etc. - "how do we stand out from others?"

In order to address shortcomings in North Island's regional and community infrastructure (business, physical, social, etc.), a priority action should be for regional and community governments and all those with an interest to design and deliver targeted campaign to cover careers, education and training, housing, regional industries, types of employment, unique lifestyle, nature, benefits working and living in the region. This needs to include: a targeted TV campaign; social media campaign; videos/interviews/ success stories; and engaging influencers and target populations.

A collaborative regional and community infrastructure strategy should focus on some of the following potential actions:

- Affordable and available housing, including a local rental program, reducing local government costs of building, changing local bylaws around short term rentals and secondary suites, etc.
- Supports/incentive for improving local community assets and attractiveness.
- Flexible, affordable and (when necessary) subsidized childcare and childcare capacity, including co-locating childcare with high schools and near large employers/sectors.
- Responsive, flexible transportation links and strategies, including additional public transit, bus links (for commuting and moving) between communities in the regions, a dedicated transportation company, incentives for rideshares and volunteer transportation, etc.

- Expanded, easier to navigate local healthcare and social services, including a strategy to address mental health and addiction on the North Island.
- Digital connectivity, including mobile phone service in remote areas, and other technology including becoming a hub for AI-related enterprise and work.

B) Sector-Specific Talent Strategies

The tables below outlines the key recommendations related to talent needs by priority sector.

Sector	Talent Area	RECOMMENDATIONS FOR ACTION SOLUTIONS
AQUACULTURE	Recruitment & Retention	1. Promote the aquaculture sector in partnership with First Nations, governments and communities. 2. Enhance the positive engagement with First Nations and local communities, supporting ongoing dialogue and partnership to enhance collaboration. 3. Promote the sector's importance in food production to support interest in career and business opportunities. 4. Conduct a talent supply analysis for future growth and diversification.
	Training & Development	5. Facilitate transferable skills training for sector workers to support adaptation to technological and market changes. 6. Support the development and delivery of local training programs, including community well-being and employability programs. 7. Build sector and First Nations training partnerships with local schools and colleges.
	Policy & Advocacy	8. Work together to advocate for policy changes benefiting the aquaculture sector and aquaculture-based communities.

FORESTRY	**Recruitment & Retention**	1. Create an online BC-wide attraction campaign to attract families to the region by highlighting the region's forestry jobs, career prospects, and lifestyle advantages. 2. Develop forestry career progression paths and provide information to workers and job candidates. 3. Continue to implement diverse and inclusive recruitment initiatives, focusing on local First Nations, youth, women, immigrants and mature workers.
	Training & Development	4. Work with governments and post-secondary to provide forestry-specific scholarships, bursaries and grants. 5. Work with employers and Skilled Trades BC to expand forestry apprenticeships, internships, summer jobs, and mentorships. 6. Communicate a wide range of forestry careers to target audiences (see above) 7. Create and disseminate a forestry-specific career map(s). 8. Leverage existing workforce development ecosystem to upskill and reskill workforce through government and employer funded programs. 9. Form partnerships with local First Nations to attract & recruit Indigenous youth & jobseekers.
	Youth Talent	10. Form partnerships with local, regional, provincial and national educational institutions for targeted recruitment and education programs and curricula. 11. Integrate forestry curriculum into the K-12 and PSE systems and update it regularly. 12. Organize forestry tours. 13. Expand the industry-based Fundamentals in Forestry Program within and outside the region.
	Policy & Advocacy	14. Advocate for making the Canada Summer Jobs program more flexible to meet the needs of forestry businesses and operations.

Sector-Specific Talent Strategies

The tables below outlines the key recommendations related to talent needs by priority sector.

Sector	Talent Area	RECOMMENDATIONS FOR ACTION SOLUTIONS
HEALTHCARE	**Recruitment & Retention**	1. Organize and conduct annual job fairs focusing on increasing networking capacity for connecting recruiters and job/career-seekers. 2. Leverage policy and programs to tailor the Provincial Nominee Program and federal immigration programs to attract and recruit more internationally trained healthcare workers to the region and sector. 3. Work with sector employers and post-secondary institutions to leverage the talent of international students in the region. 4. Promote healthcare sector as a career for Indigenous youth. 5. Expand local healthcare/medical training including on-the-job learning opportunities.
	Training & Development	6. Collaborate to attract and retain quality healthcare educators. 7. Offer more and more flexible training for healthcare occupations. 8. Offer upgrading and training for internationally trained healthcare workers.
	Housing & Infastructure	9. Provide sustainable housing and flexible childcare (scheduling, location, etc.) solutions for healthcare workers in the communities.
	Policy & Advocacy	10. Advocate for the Government of Canada to improve credential recognition of internationally trained medical professionals/healthcare workers.

TOURISM	**Recruitment & Retention**	1. Establish the region's tourism brand as a year-round destination. 2. Collaborate with local communities for recruitment, both seasonal and year-round. 3. Develop and promote more year-round employment opportunities, including part-time, full-time, remote, and hybrid. 4. Attract First Nations to co-create and promote Indigenous tourism products and services in the region and beyond. 5. Leverage go2hr resources and capacity to provide more digital marketing of talent and global talent search by the sector. 6. Bring international workers and attract global talent with a focus on high demand skills and customers' needs.
	Training & Development	7. Establish a regional tourism training centre with North Island College and others. 8. Advocate for and leverage for more suitable government grants for training and other skills development. 9. Provide more on-the-job training leading to certification and career advancement to increase workers' and candidates' interest in tourism careers. 10. Engage regional tourism owners in training development and delivery, including working with go2HR on this.
	Housing & Infastructure	11. Work with sector and regional governments to develop innovative and flexible housing solutions for local and seasonal workers including temporary hotel/site options, work and live options, etc. 12. Create new housing initiatives and leverage existing opportunities and capacities in the sector (temp hotel/site accommodation, work and live options, others).
	Policy & Advocacy	13. Create a 'Tourism Champion' role in the sector and region. 14. Advocate for making the Canada Summer Jobs Program more flexible to meet sector's needs.

C) Cross-Sector Talent Strategies

The table below shows the seven priority areas and recommendations tailored to address specific workforce challenges within the regions, ranging from attraction and retention, targeted skills and career development, and utilization of local and global talent to community development and infrastructure improvements.

SEVEN PRIORITY AREAS AND RECOMMENDATIONS (Cross-Sector)

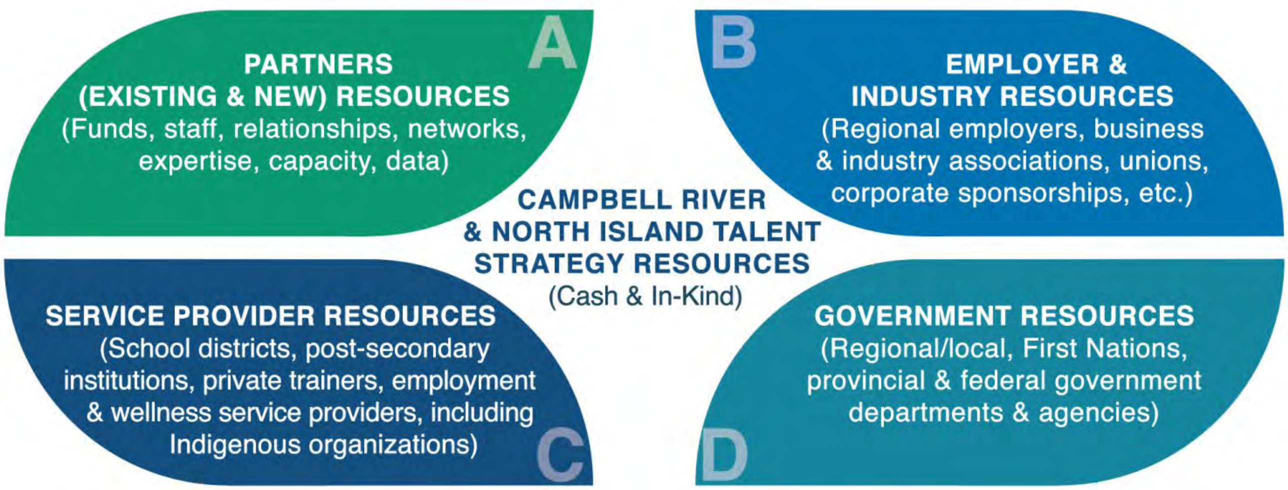
	A Region-specific Attraction & Retention	B Youth, K-12, PSE Industry-Related Initiatives	C Sector-specific Skills & Career Development	D Utilization of Diverse Talent Pools	E Informed Career & Employment decision-making	F Housing & Community Infrastructure	G Advocacy & Influencing for Workforce Support
1	Develop an easy to navigate online platform to showcase jobs, regional highlights and resources for new residents. Include success stories tailored to target audiences.	Develop K-12 sector-specific curricula driven by industry to engage local youth.	Provide more flexible & local training opportunities and programs on North Island to provide a variety of skill-building options within communities.	Leverage existing & advocate for more incentives for employers to tap into under-represented talent including Indigenous people, career changers, mature workers, newcomers, women, etc.	Develop sector-specific career & job information materials, including adapting the 2023 BC Labour Market Outlook (BCLMO) data for North Island employer & sector use.	Diversify housing supply, regulate short-term rentals, address secondary suites, & improve affordable housing near bus routes.	Provide incentives & seed funding for First Nations/ public/private talent partnerships including community-based & flexible training.
2	Update branding for each sector to attract talent. For example, tourism is a year-round destination.	Expand internship, co-op, and apprenticeship programs that allow students and graduates to gain practical experience.	Build more opportunities for cross-sector training to support workforce mobility & enhance employability in the regions.	Increase awareness about & facilitate recruitment & retention of new immigrants, international students & temporary workers. Provide tailored internships, job placements, apprenticeships, & contract work for such talent.	Disseminate career information online, in communities, schools, public spaces, transportation hubs. Use latest BCLMO data on Top Jobs in the region now & over the next 10 years.	Develop a collaborative North Island childcare strategy to leverage more resources for childcare spaces in the region including co-locating spaces and schools and spaces & large employment hubs.	Leverage existing & advocate for additional funds to First Nations to support their forestry capacity growth and support workforce development in this context.
3	Industry to work with government to repurpose an existing program to offer relocation and retention incentives in high-demand sectors.	Expand & promote summer job opportunities across all sectors for hiring students and graduates. Offer these opportunities to facilitate career exploration & decision- making.	Promote & offer more skilled trades apprenticeship opportunities, including apprenticeships in secondary school & for those working in trades and uncertified.	More sector collaboration with First Nations employers & other stakeholders to increase economic & employment opportunities for Indigenous people in the region.	Develop a North Island Career Map to show career opportunities in high-demand occupations & show pathways with training & related jobs.	Continue with existing initiatives on digital connectivity, including enhanced mobile phone service in remote areas. Establish North Island as an AI hub for businesses & young professionals.	Work with the Province to tailor the Provincial Nominee Program for the North Island to meet high demand needs in the health & wellness sector, hospitality & others.
4	Offer more employer workplace flexibility (e.g., hours schedule, length of day, less days, outside of regular hours) for employees.	Create more mentorship opportunities within each sector. Promote mentorship opportunities for K-12 and PSE students and graduates.	Work with employers and PSE to create more non-trades, apprenticeship-like training models for operator, technician, technologist and service positions.	Create and offer remote & flexible work options to attract a wider range of talent, including caregivers & those in remote areas.	Organize and host cross-sector & sector-specific job & career fairs and networking events, partnering with regional employment services.	Enhance transportation assets within & between North Island com munities, including implementing ride shares, volunteer transportation, & a dedicated 24-7 transport company.	Promote the goal of an integrated & interdependent 'workforce ecosystem' requiring collaboration & coordination among sectors, First Nations, other governments, K-12, PSE & employment services to maximize synergy & effectiveness.
5	Introduce Local Talent Recognition programs & awards for exceptional local talent to enhance attraction, boost morale, and foster loyalty.	Introduce Career Discovery Programs in collaboration with regional employers. Organize 'challenges' where students solve real-world industry problems.	"Leverage more funding for post-secondary institutions to work with employers & sectors in the use of micro-credentials & flexible, short-term training.	Equip employers and HR teams with training to value workforce diversity, especially among Indigenous, immigrant, female & persons with disabilities talent.	Organize joint workshops with industry leaders & industry speakers in schools for practical career insights and awareness/interest building.	Develop a North Island digital 'catalogue' of community assets to promote attraction & good quality of life through community events, & cultural & outdoor activities.	Develop a guide for North Island employers on workforce development funding programs & promote for tax incentives for companies training students and young professionals.
6	Offer career support for spouses to attract couples and families & to enhance the region's appeal for family relocation.	Expand dual credit programs with work experience & education sectors with high demand.	Utilize technology to offer mobile training units & virtual platforms for specialized sector-specific training across regions.	Work with sectors & regional groups to develop a Gender-Based Analysis Plus (GBA+) of the regional workforce & implications for action	Offer sector-specific job development services to address unique industry needs and trends.	Increase regional collaboration to expand access to & advocate for more mental health & addiction services & resources, especially in remote areas.	Offer small business mentorship & small business setup programs to boost entrepreneurship in the region.

Sustainability, Funding and Partnership Opportunities

A critical component of these recommendations includes consideration of and planning for the sustainability of all strategies and tactics to be implemented. Some strategies/tactics may be shorter term with immediate results, and others may be more involved and/or need ongoing support beyond the initial implementation.

The eventual plan (developed by the Partners and a Workforce Steering Committee) for resourcing these recommendations should be multi-year and multi-pronged. While some revenue sources may provide a significant portion of the necessary resources, there are several funding sources from which to draw. In principle, cash, in-kind and knowledge resources will be tapped into for recommendation implementation as captured in the chart below.

<u>Priorities for early funding for Recommendation Implementation</u>



An important point should be made when asking funders for resources for these recommendations. While this is a "Made-in-North Island" approach, many priorities and tactics in it will test and demonstrate opportunities for innovation and positive outcomes and will provide models for replication and adaptation in other communities (particularly other rural and remote) and regions across BC and Canada.

<u>Potential Resource Partnerships</u>

Resource partnerships with the Partners and a Workforce Steering Committee could be sought during the implementation of these recommendations, including the following types of organizations and cash and in-kind contributions:

- Employer and industry associations in key sectors;
- Chambers of commerce and business improvement associations;
- Major public and private sector employers;
- Major provincial and regional business groups;
- Post-secondary institutions and major employment service providers in the regions;
- First Nations and Indigenous organizations, including employment and training entities;
- Non-profit organizations which represent disadvantaged and/or underrepresented labour force groups (e.g., immigrants, persons with disabilities, LGBTQIA2S, etc.);
- Labour organizations;
- Government agencies and public sector employers such as healthcare authorities and crown corporations;
- Media outlets; and,
- Others to be determined.

Implementation Recommendations

This report's final set of recommendations involves suggestions on how to plan, prepare for and implement the above talent recommendations. It focuses on what the three Partners, along with other organizations which agree to participate, should do next after accepting and distributing this report.

We suggest the following general sequenced steps:

1. Distribute this report widely through Partner networks and social media.
2. Partners go through an internal prioritizing of recommendations process.
3. Partners determine the extent to which they will differentiate between the three areas (Campbell River, RDMW and SRD) and the priority sectors (aquaculture, forestry, healthcare and tourism) in implementing any recommendations.
4. Communicate to and engage with stakeholders and First Nations which recommendations the Partners plan to proceed with implementing.
5. Obtain a response from stakeholders and First Nations who wish to participate in this implementation.
6. Create a representative Steering Committee to help guide and inform the Partners work - possessive on the implementation.

7. With the Committee, further prioritize the list of recommendations for action (immediate, short, medium, long term). Use a lens of biggest impact, most urgent, 'low hanging fruit,' etc.
8. Create an estimate of resources, timelines, and partnerships for the implementation.
9. Obtain preliminary partner and funding commitments necessary for starting the implementation.
10. Develop a detailed Implementation Plan that identifies phasing, timelines, resources, partnerships and roles and responsibilities and specific strategic and tactical methodologies. This Plan should include a Sustainability Plan and an Evaluation Plan regarding resources for and tracking the results of the implementation respectively.
11. Obtain input from the Steering Committee on strategies and tactics.
12. Execute the Implementation Plan in a phased way and including the following sections.

Thank you to members of the Project Steering Committee and the Project Healthcare Subcommittee for their invaluable insights and time contributing to this Project and Final Report:

<u>Project Steering Committee</u>

Shannon **Baikie**, North Island Employment Foundations Society
Jennifer **Case**, North Island College
Jackie **Challis**, Regional District of Mount Waddington (after Oct. 31)
Steph **Coe**, Mt Waddington Learning & Development Society
Pat **Corbett-Labatt**, Mayor of Port Hardy
Geoff **Crawford**, Ministry of Jobs, Economic Recovery and Innovation
Lesly **Deuchar**, Island Health
Jason **Downing**, Mowi Canada West
Pat **English**, Regional District of Mount Waddington (before Nov. 1)
Tina **Gonsky**, Grieg Seafood BC
Megan **Hanacek**, Pacific West Resource Management
Danielle **Hoogland**, North Island College
Bridget **Horel,** BC Ministry of Jobs, Economic Development and Innovation (until Sept 18, 2023)
Dan **Jorgenson**, United Steelworkers
Rose **Klukas**, City of Campbell River
Leah **Knutson**, City of Campbell River
Renée **LaBoucane**, Strathcona Regional District
Janet **MacDonell**, Campbell River Medical Staff Engagement Initiative Society
Sadie **Mack**, Campbell River and District Division of Family Practice
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APPENDIX 1: SUMMARY OF ECONOMIC FORUM HELD ON APRIL 5TH AND 6TH 2023

The small business sector of the economic development division of the Ministry of Jobs, Economic Development and Innovation indicated the BC government priorities of affordable housing, safe communities, improved health care and a sustainable, clean secure fair economy built through inclusive and clean growth. Programs offer supports for communities, workers and business and are funded up to $180 million to increase economic capacity and diversification and deal with impacts on the forest industry such as the old growth deferral decisions.

The North Island College Applied Research, Technology and Innovation Program employs local students and faculty to solve problems of local communities and business. Several projects were described. Many involved local Indigenous groups. Aquaculture and mariculture were often the subject of projects.

The Pacific Seaweed Industry Association aims to grow a strong Canadian seaweed industry working with producers, nations and industry partners. Such an industry would have positive impacts on First Nations, food security, the climate and job creation. The PSIA network can provide connections, develop technology and build community in this new industry.

PacifiCan has opened an office in Campbell River to support local businesses and organizations and to provide a link to Ottawa and government services. It offers funding and support for business growth, diversification and local economic development.

Port Alice provided a detailed list of current activities and planned projects.

The BC Ministry of Forests gave a presentation on aquatic plants and. described how federal, provincial and Indigenous organizations were involved. Licensing and regulatory requirements were covered as were the differences between harvesting wild plants and cultivation. The benefits of such cultivation include commercial opportunities, ecological and environmental plusses, and increased food security.

A representative of the Coastal Marine Stewardship Branch of the Ministry of Water Land and Resource Stewardship described the role of his branch, the areas in which it works and the initiatives it is undertaking. A major focus is to develop with First Nations a coastal marine strategy that will focus on BC's interests over the next 20 years. The outcomes of the strategy will be a healthy coast, resilience to climate change, respectful relationships, knowledge sharing, community well-being and a sustainable, thriving ocean economy.

An Island Coastal Economic Trust representative described ICET's role to provide funds for economic development of local coastal communities. Also outlined was a strategic plan to evolve the trust into an economic development organization involving local, provincial and Indigenous governments which would have adequate, secure long-term funding.

The Namgis First Nation described the forests in their territory and outlined plans to develop the forests and lands consistent with the values of ensuring the cultural, environmental and spiritual vitality of waters, land and resources and protecting and sustaining them for plants, animals and future generations.

Roslyn Kunin of Roslyn Kunin and Associates presented the secondary research of the ongoing labour market study for the mid- and north Vancouver Island. She noted that, a comprehensive literature already exists covering the economy and labour force of NVI and beyond. Much of it is specific to the four key sectors on which this study focuses, namely, aquaculture, forestry, tourism and health. Although some information is becoming dated, many studies are very current and include the 2021 census data.

The analysis and outlooks covered here indicate that opportunities for growth exist in the sectors of interest and others such as technology. Limiting this potential is the consistent and widespread conclusion that labour supply constraints have been and are putting a cap on growth across sectors in NVI and beyond.

The promises of growth in aquaculture output in Canada could come to naught because of lack of workers. In BC, the sector is threatened with the closure of operations in the Discovery Islands area pushed by environmental concerns that some say could be dealt with by other means. Forestry could also be affected by environmental constraints.

The potential for growth in the tourism sector is strong and will remain so even after the burst of post pandemic revenge travel abates. Indigenous tourism can offer unique and special adventures even to those who are already well travelled once the packages and the personnel to deliver them are in place.

Adequate health care is absolutely essential for community advancement. Not only will people and businesses not come to an area that is not sufficiently served, but existing entrepreneurs and residents will be tempted to leave. The Campbell River division of family practice has many resources for incoming physicians and the government of BC is taking steps to increase the supply of doctors and nurses in the province.

As noted in the literature, several strategies have been proposed to deal with both specific and general labour shortages. These include detailed labour market information, packages, pathways that can guide young workers and others into needed occupations and much literature on the advantages and attractiveness of living in this part of the province.

Some of the most useful work on alleviating labour shortages has been produced by and for the Indigenous communities. The material produced by the Nanwakolas is an example of Nation specific work that can have broad applicability.[65] This work is especially important as Indigenous communities face special challenges to labour force inclusion including geographic isolation and lower than average internet connectivity and varying skill levels. It is also vital since Indigenous people make up most of the growth in the local labour markets.

In spite of what has already been done, the problem of worker shortages still persists. The present study will build upon the available information, suggested practices and strategies. We will use surveys, interviews and focus groups to make sure our knowledge is up to date. We will then turn to the community to determine how such strategies, practices, etc. can actually be implemented so that NVI can reach its long-term potential.

[65] Nanwakolas Council Society. (2020). Career Pathways Guidebook: Volume 1. Prepared by D. Bazowski and B. Cruise. Available here: https://nanwakolas.com/wp-content/uploads/2020/08/Nanwakolas-Career-Pathways-book-web-v2.pdf.

APPENDIX 2: LESSONS LEARNED: EXCERPTED WITH PERMISSION FROM REGIONAL DISTRICT OF MOUNT WADDINGTON

Excerpted from: Human Capital Strategies. *Literature Review & Summary: Home-Based Knowledge Worker Attraction Campaign Project*. Prepared for Regional District of Mount Waddington. March 9, 2021.

Note: While this is excerpted from a project on "home-based knowledge workers", the literature review and interviews for it related more broadly to the attraction, recruitment and retention in many occupations for small cities and towns mostly in BC.

Literature Review Summary Process

In addition to literature provided by Vancouver Island North Training & Attraction Society, HCS conducted an internet search using the following key words.

- Home-based knowledge workers
- Knowledge workers working remotely
- Knowledge workers working from home
- Worker attraction to rural communities
- Rural communities
- Rural attraction strategies
- Knowledge worker attraction
- Barriers to knowledge worker attraction
- Best practices in knowledge worker attraction
- Home-based businesses in rural communities
- Barriers to home-based businesses in rural communities
- Attracting urban workers (to rural communities)
- Attracting urban knowledge workers
- Lifestyle advantages of rural communities

Fifty-one individual pieces of literature were reviewed and 26 of them are cited in the following summary.

Literature Summary

- Almost 50% of the U.S. workforce was already working remotely early in 2020 and as result of their experiences, 62% of hiring managers in the U.S. indicate their workforce will be more remote going forward (Adam Ozimek).

- Forty percent of U.S.-based workers generate a large part of their income from the gig economy. A big part of the gig economy is home-based freelance work among professionals and companies are expected to hire more gig workers (Gad Allon).

- "Gig workers can be viewed as unincorporated self-employed workers (sole proprietors) who report business, professional or commission self-employment income, and whose future business activity is uncertain or expected to be minor or occasional." The largest occupational category of gig workers in Canada is in professional, scientific and technical services. (Karen McCallum).

- "No longer tied to offices, city dwellers are hearing the call of bigger yards and larger living spaces…An ongoing blend of remote and office work could see the appetite for more space continue" (RBC Economics).

Barriers

The most commonly-cited barrier for any professional considering a move to a rural area is a **fear of isolation**. Kevin Dwyer, when interviewed by *ChangeFactory,* noted:

> "The composition of elements that attract talent to a company in a rural community are not different to those that attract talent to a company in an urban community. However, in most cases, there is a need to provide a stronger counterbalance to the perceived negatives of a rural location such as isolation and reduction in services" (Dwyer).

In its 2018 report to the Vancouver Island Coastal Economic Developers Association (VICEDA), Nordicity found that local tech workers believed that those from outside Vancouver Island feel the region is too remote, and that workers on the Island felt remote from one another. They complained of a lack of direct flights to major centres like the Bay Area/Silicon Valley, and that the cost of shipping to and from the Island was a major expense for some (Nordicity Group Ltd. and Big Bang Communications).

A 2018 Gallup Poll cited by Drew Repp (https://news.gallup.com/poll/245249/americans-big-idea-living-country.aspx) found that the **financial cost** of making a move to a rural area anywhere was a major barrier, and that as a result many city-dwelling Americans found themselves "frozen in place" (Repp). Gallup points out, "The gap between the desire to live in a rural area and the actual percentage living in such an area is evident across all four age groups [sampled]" (Repp). Respondents to the poll also mentioned the **emotional toll of leaving behind relationships** as a disincentive to move.

Dwyer meanwhile sees emotional isolation as being intertwined with a feeling of physical isolation in a rural community, which he says can be exacerbated by a **lack of services** one is accustomed to in a city. A disparity of services in rural areas is witnessed worldwide, with Germany's Young Economic Summit issuing a statement decrying, "...worsening employment conditions and a decreasing provision of private and public sector services [in rural Germany]" (YES! Young Economic Summit) while Ontario Regional Economic Development mentions that, "In rural communities, some of the main challenges expressed are boredom and poor work culture." (Ontario Regional Economic Development)

Motivators

The best antidote to feelings of isolation that knowledge workers cite as a motivator is developing **a sense of community** within a new rural home base, which when moving for work is often to be found among one's peers in the same field of work. On its website, *Imagine Kootenay* seeks to assure potential new residents of a community saying, "If your work lets you work remotely, you will find many like-minded people living the same work-life balance here in the Kootenays." It adds, while dropping mention of cultural signifiers of the tech workforce, as in, "If words like cryptocurrency, blockchain, smart cities and the Internet of Things are part of your jargon, the Kootenays is definitely calling you" (Imagine Kootenay). This taps into a scene among remote tech workers that Repp observes, saying, "a search of #remotelife quickly reveals a community with specific traits and needs, even a tone and way of talking about their work" (Repp).

Repp's piece spends a lot of focus discussing **coworking spaces** for remote workers, with 37% using coffee shops and 14% co-working spaces as their secondary work locations (after the home being the most popular primary space for 84% of workers). He stresses that, "Coworking spaces help build community… and allow for remote workers to connect with like-minded professionals who share the same struggles and triumphs," and **recommends facilitating networking opportunities among the region's remote worker community as a vector for boosting retention**: "The more remote workers are able to build relationships with their peers locally, the better they're able to imbed themselves into the social fabric of a community and thrive" (Repp).

John Arenas concurs that a sense of belonging is important, both within a company and within one's peer group, and he applies his conclusions to the context of the larger community as he notes that self-actualization and esteem "…focuses on the realization that they (the workers) are making a significant impact—both on their companies, and the rest of the community… It also involves reaching outside of their building's walls" (Arenas).

The authors of the literature review, “Finders, keepers? Attracting, motivating and retaining knowledge workers” (Horwitz, Chan and Quazi) state that knowledge workers “are autonomous people… with their commitment more occupationally than organisationally oriented,” suggesting that they are more loyal to their occupational peer group than they are to any particular employer. They add, a “communitarian-based loyalty [that] refers to identification with a group relying strongly on interpersonal relations and perceived common interests” (Horwitz, Chan and Quazi).

No wonder then that Becky McCray, reviewing November 2020 research from Qatalyst Research Group, on efforts to attract remote workers from around the world (https://qatalyst.ca/blog/file/AttractingRemoteWorkers.pdf), found that the most common tactics were offering **financial incentives**; **providing coworking spaces**; and **building a community of remote workers** (McCray).

In terms of financial incentives, the biggest motivator discovered repeatedly is **affordable housing.** This was true specifically for the RDMW in the 2018 "Summary Report for Regional District of Mount Waddington" prepared by Maru/Matchbox. Their survey of BC and Alberta residents open to moving to a rural area states, “When attributes are viewed relative to one another… affordable housing is the top attribute. It is also a key ‘must have’ when attributes are rated individually” (Maru/Matchbox). An Island tech entrepreneur is quoted in Nordicity’s report to VICEDA saying, “I can actually afford a house here and still have disposable income. This would not be the case in Vancouver” (Nordicity Group Ltd. and Big Bang Communications).

After housing, the most repeatedly mentioned motivator for knowledge workers moving to rural areas is **high speed internet access**. Speaking in an industry webinar available on YouTube, Randy Morse, the Communications Director for B.C. Rural Centre, told participants that high speed internet was number two on a list he had compiled of the top thirteen things “young, creative types” are looking for in a remote community like Kaslo, B.C., where he is based. Kaslo is home to the Kaslo InfoNet Society Public ISP, guaranteeing local, reliable high-speed internet to the town’s citizens. (Morse, Van Horn and Province of British Columbia). Broadband is a prerequisite for promoting your community as a remote work location.

The next important motivator is **safety**. The Maru/Matchbox report stated, “A second benefit is safety – an attribute somewhat associated with all the rural communities tested” when they recommended “Potential residents need to know how Vancouver Island North stands out from other smaller communities on this specific attribute.”

The Mayor of Marquette, Kansas (population 650), after successfully overseeing a program to offer free land to 30 new residents, opined that the safe living conditions present in the town were a major motivator for them, saying, “A lot of people are looking for a little Mayberry” in reference to the idyllic setting of *The Andy Griffith Show* (Mercer).

Follow-up motivators include **outdoor recreation**, though while Repp agrees that "For those escaping congestion of large metros, it makes sense that accessible outdoor recreation would be attractive. However, not everyone is a 'weekend warrior'; for some, good amenities means **a flourishing food or music scene** and for others it's the number of miles of bike lanes" (Repp).

Challenger also identifies as important the availability of "**festivals or natural attractions**…" The key is to make sure employees believe that they are just as happy living in a rural area as they would be in an urban environment. As millennials age and start buying property and having families, they will likely want to go to places that have a low cost of living **but with access to a lot of the amenities found in cities, like restaurants and entertainment**" (Challenger).

Items four and five on Morse's list of features sought after by young creatives are restaurants/a critical mass of shops and microbreweries, respectively (Morse, Van Horn and Province of British Columbia), though it was unclear from the webinar what Morse's precise methodology was for creating this list. Repp does not provide a citation with his quote above, and there is an element of speculation in Challenger saying millennials "likely" want restaurants and entertainment.

The most scientific data we have on restaurant and entertainment amenities as a motivator comes from Maru/Matchbox, where "Nightlife / Entertainment / Music" was rated as survey respondents' *least* preferred attribute sought after in rural communities, out of a list of eight options (with "Safety / not a lot of crime" at number one and "Outdoor recreation…" at number two). "Coffee shops / Restaurants" was rated third overall, and fourth by those open to moving to Vancouver Island North (Maru/Matchbox). Yet since we know via Repp that coffee shops are the most popular secondary working space for remote workers (see above), this could be influencing their popularity on the Maru/Matchbox survey, even though the survey was not focussed exclusively on remote workers. Further research on restaurant and entertainment amenities is recommended to clarify this issue, and to ensure it is differentiated from the use of consumer spaces like coffee shops as work spaces.

Lessons Learned

<u>Online resource catalogues for prospective residents are considered by many locales to be major value-adds</u>

The City of Quesnel's *Moving to Quesnel* page is an example of excellence in this regard, taking care to highlight their affordable home prices, short commute times, variety of cultural and especially outdoor activities, educational and healthcare resources, and the city's family-friendliness. It utilizes infographics to emphasize the average price of a home; their average hours of annual sunlight; the fact that there is a daily flight to Vancouver from the city; and that the average time of a commute in town is only 8 minutes. The easy to read text and graphics ensures the information is absorbed by the casual reader, to a degree emulating social media microblogging and image sharing. For those wanting to take a 'deeper-dive' into the details, there are links to request a "Relocation Package" by mail or to download a .pdf version of the same material for review (City of Quesnel, Moving to Quesnel).

The City of Prince George website similarly excels in the area of infographics (City of Prince George), while the site for the Tofino-Long Beach Chamber of Commerce offers a similar .pdf download with extensive information on the community (Tofino-Long Beach Chamber of Commerce).

One of the primary recommendations made by Nordicity to VICEDA after consulting Vancouver Island's tech community was to: "Help compile key resources that already exist (e.g. provincial, national funding, tech events) and make them accessible and understandable. This eventually becomes a formalized platform (e.g. online tool/database) that could be easily shared and access[ed] by interested parties" (Nordicity Group Ltd. and Big Bang Communications).

Upskilling existing residents

In what could function as a source of new knowledge workers in a region, as well as a possible opportunity for existing ones to teach as a secondary source of income, Repp suggests upskilling existing residents by equipping them "with the tools and skills needed to transition from on-site work to a remote work career." He points to Utah's *Rural Online Initiative*, delivered virtually (https://extension.usu.edu/remoteworkcertificate/), as one credible program for achieving this, delivered virtually (Repp).

Dwyer echoes this saying, "Skilled workers entering a community also often bring new skills and certainly bring fresh perspectives. In many cases they provide education and training to local workers thereby increasing the capacity of the local workforce" (Dwyer).

Critical Success Factors for Attracting/Recruiting/Retaining Home-Based Knowledge Workers

Invest in expertise for spearheading programs, offering workshops and ongoing advice

When the Chamber of Commerce in Ucluelet, B.C. began providing economic development services, its small volunteer board hired a full-time Executive Director advisor. It created the Ucluelet Business and Employee Retention and Expansion Program (UBERE), and secured funding for its first year from the District of Ucluelet, the Island Coast Economic Trust, and the BC Rural Dividend Program. It interviewed 89 local employers to better understand their needs for support and gain a clearer picture of the town's overall economic outlook. Among the critical issues identified by the Chamber were employee retention and attraction, housing and commercial/industrial building shortages. The solutions developed included research and information gathering presented primarily in the form of an online resource catalogue, and in the delivery of workshops to communicate best practices, after which 28 business were directly served and membership in the Chamber increased.

In terms of financial investment, it found that the hiring of an economic development expert was key, and that spending on expert instructors to conduct workshops was worthwhile (Province of British Columbia, *How a Chamber of Comme*rce *Pivoted Toward Economic Development*).

The Basin Business Advisors Program, serving the Columbia Basin and headquartered in Nelson, B.C., features testimonials from local businesses who benefitted from the type of expertise offered in Ucluelet, speaking to the impact of having access to such expertise locally (Basin Business Advisors Program). For example:

> "I found the expertise and advice provided by the Basin Business Advisors program to be absolutely invaluable to making Discover Circus the success that is has become. The BBA program allowed us to get our social enterprise on a solid footing and avoid common pitfalls that trouble many enterprises. I would readily advise any business owner to make use of their services" (Caleb Hull, Discover Circus, https://bbaprogram.ca/testimonial/discover-circus/).

> "It has been great working with the BBA as we've grown our business. Both the business courses and the one on one time with Will and Wendy has been extremely useful. It's very useful having real-time feedback with people who understand the challenges and opportunities in the Kootenays. I appreciate having this resource and strongly recommend other business owners looking to grow to consider this excellent service" (Mary & Rodger Austin, Austin Engineering, https://bbaprogram.ca/testimonial/austin-engineering/.

<u>Invest in time to create personalized outreach to prospective residents, and invite them to the region to experience it firsthand and start becoming part of the community</u>

A strategy employed by the State of Vermont is its "Stay-to-Stay" weekends, aimed at enticing some of its 13 million tourist visitors per year to move to the State. Four Vermont towns have hosted dedicated welcome receptions with local leaders for tourists on a Friday night, giving the visitors the weekend to explore on their own and then meet with local business leaders and real estate agents on the Monday morning. The program is sponsored by the State Tourism and Marketing Department and local Chambers of Commerce. The four sessions ultimately resulted in 4 people relocating to Vermont.

In order to address a glaring lack of doctors in the City of Quesnel (circa 2014), the role of a dedicated Healthcare Recruitment Coordinator was created, making use of funding from the Cariboo Chilcotin Hospital Regional District. The Coordinator helped create an online resource catalogue detailing the city's amenities and points of attraction, as well as a brochure specifically targeted at medical professionals who might consider making Quesnel their home. When a prospective doctor makes an inquiry, the Coordinator makes an outsized personal investment of time in wooing them. She plans for the doctor to come to Quesnel to go on a bespoke tour of the city based on their unique interests, creates a customized welcome package for them when they arrive, and is available for any follow-up questions after the tour. For doctors who proceed with moving, the Coordinator helps them secure housing in what is a tight rental market; and is there as aide to help them settle in, including personally meeting them at the airport upon arrival and introducing them to other citizens with whom they may have something in common. As a kickoff to this type of networking and to celebrate the new arrival, a welcome dinner is arranged in their honour, to which the rest of Quesnel's medical community is invited to attend. Doctors' families too are kept in mind, as they begin new lives in the community, seek employment and start to become rooted. Ultimately, the hiring of the Healthcare Recruitment Coordinator, utilizing this kind of personal outreach, resulted in an amazing 13 new doctors moving to Quesnel in 2015 (Province of British Columbia, Investing in Personalized Health Professional Attraction Pays Off). It may be worth exploring whether having a similar kind of dedicated 'salesperson,' whose role it is to shepherd Home-Based Knowledge Workers considering a move to the RDMW through the process of doing so, ensuring that the HBKW has all the information they need to make an informed decision, see the area first-hand and meet some of their peers, might yield similarly impressive results.

Meanwhile the front page of the Tofino-Long Beach Chamber of Commerce website showcases the West Coast Ambassador Program, which is:

> "…for anyone who wants to learn more about the amazing place we live… The courses are open to all local residents, including seasonal staff, newcomers and business owners. It's all about Tofino and Ucluelet – its history and first inhabitants, its ecology, its business community, its festival and events, and much more. The West Coast Ambassador Program provides valuable knowledge of the area and tips for living and working here" (Tofino-Long Beach Chamber of Commerce).

A program like this both empowers locals to act as boosters of the area to visitors and potential future residents or investors, and acts as an opportunity for those future residents or investors to be introduced to the area (Tofino-Long Beach Chamber of Commerce).

Key Informant Interviews

This section provides a summary of key themes which emerged from interviews with nine key informants in and outside of the Vancouver Island region of BC. The interviews were conducted via Zoom during April 21, 2021 through May 4, 2021. They averaged approximately 45 minutes, ranging from about 30 minutes to 70 minutes. All interviews were conducted and documented by Human Capital Strategies' (HCS) CEO, Kerry Jothen.

This thematic summary is based on thirty pages of raw notes transcribed from the interviews. The interview questions are detailed in Appendix 1 and were developed based on the secondary research findings outlined on in a separate report earlier this year.

The themes that emerged from interviews with the above key informants/respondents identified, largely echoed ideas uncovered in previous phases of the research, including the literature review and survey of Home-Based Knowledge Workers (HBKWs) conducted.

Key Themes

The following key themes that emerged from the interviews – especially the first four – are summarized to some degree in order of priority and frequency from the perspective and experiences of the key informants/respondents. For some, their comments were specific to their region or community and for others, their comments pertained to rural and remote areas in general.

1. There was consistent agreement that **reliable high speed internet** (and cellular reception) is a major factor in attracting HBKWs to rural areas. One respondent spoke of her past experience as an entrepreneur working out of Alert Bay, describing internet and cell phone reception at the time as spotty and "a fundamental problem." Constraints such as difficulty working with service providers were mentioned, who have difficulty installing fibre optic cable in regions with challenging topography. The town of Kaslo, B.C. grew so frustrated working with the big IPs that they founded their own—the Kaslo infoNet Society, providing reliable upload and download speeds for Kaslo residents, with ultra-customizable data billing. The respondent said, "If I wanted to, I could phone Kaslo infoNet, say, 'I am about to stream a movie from India, give me a gigabyte'—boom, done." He is sharing the story of Kaslo infoNet with others and is willing to put them in touch with the Society in the hope that other locales can implement similar internet service models.

2. Access to **outdoor recreation** and natural landscapes was a recurring theme noted about HBKWs being attracted to rural areas. While specific activities were not often cited (i.e. with knowledge of winter sports likely taken for granted), cycling and fishing were mentioned as summer activities, as well as a "business Olympics" event put on by Community Futures British Columbia and outdoor music festivals.

3. **Short commute times** were mentioned as a key feature to communicate, alongside proximity to more major centres, including regional hubs with airports; and the ease with which supply chains flow in and out of the area e.g. average shipping times, and the reliability of the transportation infrastructure.

4. **Networking opportunities** were referred to as "hugely important" for workers new to an area, with it said of HBKWs that, "they work in a solitary way, but they also crave community." One respondent was of the opinion that, "most people hate networking but they like having that connection; if it's casual, people are more likely [to go,]" lending credence to the idea that opportunities to socialize without necessarily being touted as "networking" events may be of interest to HBKWs. Another noted that, "Networking happens organically [as a] critical mass of creatives develops;" and independent natural resource consultant, A respondent also highlighted the need to create, "a sense of community" by "plant[ing] 'seeds' all over." Finally, the downstream benefits of ensuring that HBKWs feel part of the community on retaining them for longer periods of time was mentioned.

5. Another way that HBKWs network is through their use of **co-working spaces**, even if only part-time, as a social outlet and opportunity to brainstorm with others; and these activities are said to be taking place via Zoom during the pandemic. Dedicated co-working spaces for knowledge workers are understood to be relatively widespread and popular in British Columbia, though some of the communities represented by our informants were still in the exploratory phases of setting ones up.

6. It was agreed that **amenities** such as brewpubs, coffee shops and restaurants as "anchor establishments" provided a good foundation for attracting HBKWs, as well as arts and cultural activities such as galleries and festivals. These kinds of amenities were singled out as important in small communities by key informants in the Kootenay and Vancouver Island regions in particular.

7. **Housing affordability** and the overall **lower cost-of-living** in rural areas were recurring themes. While although property prices are rising across North America at the time of writing, smaller locales retain their competitive advantage as an attractor. Housing supply, however, remains a barrier in rural areas, both on Vancouver Island and across B.C., as it was during comparative slumps in the market. Our informants felt that the supply issue is increasing in severity, with market saturation seen to be spiking in areas that find success in developing a critical mass of new workers and radiating outward as the lack of supply in one area drives the inflow of newcomers to the next most desirable area and the cycle repeats itself. Having not just adequate housing supply but a *range of* housing opportunities was seen as important, to accommodate workers with different income levels, and those preferring to both buy and rent—affordability means different things to different people. It was suggested that different ways of looking at zoning regulations and housing density should be considered, avoiding situations like having a lack of rental units available, while underdeveloped tracts of land in what are potentially valuable areas stay on the market for months at a time.

8. **Family-oriented** services were stressed as attractors that should be promoted too, such as local daycare services and the school system, and the kinds of activities available for children to engage in. One respondent believes one of the reasons that many HBKWs with families move to the Columbia Basin is the solid foundation of family services in the region, and the feeling of **safety** that exists in local communities. In Creston, B.C. which has traditionally been more of a retirement community, the respondent recounted an effort to improve the local recreation centre and family activities on offer, which she said "really helped" with attracting young families. Promoting safety and family-friendliness has benefits for workers with senior relatives too, as older parents are known to sometimes move to be closer to where their children with young families are. And family-friendliness was also mentioned as a factor "drawing people back home—" residents who grew up in the area who either left for more urban centres or were considering such a move.

9. Retaining homegrown talent can be further facilitated through **educational institutes** in the region. It's believed that HBKWs are generally driven to pursue ongoing developmental opportunities and being close to post-secondary institutes can help make them feel like growing in their current skill-sets or developing new ones is easy, even with the ever-growing availability of virtual education options. To develop interest in tech work in particular over the long term, creating partnerships between local tech workers and K through 12 schools was recommended, with the possibility of one-on-one mentorships/apprenticeships.

10. **Investing in external (to the community) expertise**, for leading programs and offering ongoing advice was touched upon. A respondent entrepreneur on Vancouver Island described a positive experience working with a group of designers out of New York City when founding an earlier business and agreed that collaborating with others in-the-know across British Columbia and Canada can be a valuable source of fresh ideas and cutting-edge knowledge. Yet he warned about projecting a sense that one's community requires "rescuing" and bringing "outsiders in to save us." Another respondent on Vancouver Island echoed that the remoteness of a location need not present a barrier to seeking out knowledge from the broader, corporate landscape; and another spoke of the City of Quesnel partnering with the Ontario-based organization, Rural on Purpose, for a week of learning about co-working spaces. Another respondent agreed that help from abroad "can be crucially important" as a set of outside eyes, "because a community sometimes doesn't [realize] the assets they have." But he warns that frequently these efforts can fail because there, "won't be buy-in locally for the project—[it] ends up in a binder in a dusty filing cabinet. [It] has to be real, authentic, enthusiastic."

    In the spirit of Quesnel's efforts to locate new doctors for the town by **hiring a dedicated professional** to seek out, provide attention to and woo medical professionals potentially interested in moving in, it was a common theme to recommend having specific "champions" on staff who can focus on courting prospective residents. The same respondent said, "If you treat it as a bureaucratic thing, nothing is going to happen. [It] has to be more organic." In some cases, this might be a couple of people or a team, but the key is to have the time available to engage in activities like providing tours of the region, helping to locate housing for the prospect, introducing them to current residents, and forming a genuine relationship with the prospect as well as their families.

11. On the topic of **rebranding**, with the variety of experiences being involved in past worker-attraction campaigns held by our interviewees, we received advice exemplifying common marketing tactics such as developing 'personas' of prospective residents to clarify the demographic and psychological characteristics of who the Region is seeking to attract; and emphasizing the features of the Region that are especially unique to it, while spending less time promoting features that, while desirable, are common to competing locales. Transparency and honesty were repeated themes from multiple informants, to ensure the best fits between the Region and new residents, and thereby ensuring longer-term retention.

12. The fact that most communities fail to undertake **a thorough assessment of their unique assets** was underlined as a common barrier to success. While something like the region's physical beauty can be featured in the attraction campaign, this may not be a significant differentiator from other communities. Certain features may seem trivial at first, but they're worth considering if they are genuinely unique, and how a strategic plan might be built around them.

13. A respondent described undergoing an **audit of how the city is perceived by outsiders** as part of its *Move Up Prince George* campaign. They recognized that there were certain negative attributes associated with Price George, despite having sustained efforts to counter these in the past (e.g. that the city is very industrial, "dirty and smelly," has a lot of traffic passing through it, and that the weather is particularly cold although the average temperature compares favourably to the Prairies or Eastern Canada.) With these perceptions seeming to be fairly ingrained in some audiences, they sought to identify segments of the population who were unaware of them or evidenced an ability to be open-minded to other points of view. They were committed to being truthful and emphasizing their strengths which they believed to be life-style attributes, such as the level of education among the population and their depth of experience. Much of the Move Up Prince George campaign was aimed at attracting employers, that is, businesses, to the city, and to some degree may lack applicability to campaigns directed at attracting a particular class of workers to a region.

14. Other campaigns that our informants have participated in had similar "apples-to-oranges" characteristics, not being specifically tailored to attracting HBKWs, who are already employed and with the ability to work from any locale. This gives a certain amount of broadness to some

of the lessons learned, where in some cases informants' experience was lacking, commenting for example on how best to retain HBKWs that "retention is driven by the employer;" or that seeking only home-based workers is "limited" in scope.

15. At the same time, a lot of valuable lessons can be drawn from informants' campaigns that differed in scope, such as the importance of focussing effort on a region's **website** as a nexus of information and resources for prospective residents. Both Quesnel and Prince George made overhauling their websites key elements of their rebranding efforts. Many invested in creating videos or podcasts, as well as downloadable relocation guides. Prince George's videos were praised for being especially interactive and serving as a way to virtually tour the city. The ability to disseminate information online that enables **local citizens to become ambassadors** for their towns was noted by multiple interviewees. With a town full of citizens equipped in this way to speak to outsiders, Powell River, B.C. identified the fact that tourists to the town could also be viewed as potential residents, and so tailored a lot of their marketing to act as both visitor and resident attraction. Vernon similarly decided to focus on a single brand, as opposed to having a separate tourism brand. A respondent commented on noticing that while prospective residents came to visit Quesnel in person, often their spouses would be back home receiving a positive first impression of the city thanks to the time invested in their online assets.

16. Considering the RDMW's efforts to **attract HBKW's on a regional level**, our informants liked this approach. Without a regional umbrella, they reported seeing individual towns in a region competing against each other for provincial money, and felt it was best when local communities could work together collectively. The Imagine Kootenay organization, administered by Community Futures Central Kootenay, was cited as such a successful regional effort. Another hybrid type of strategy suggested involved individual towns developing information tailored to their own communities, which would be primarily accessible via the regional site. This would allow for "more targeted, nuanced" pitches to be made, while understanding that the town is supported by the regional infrastructure, and what the region as a whole has to offer.

17. Generally speaking, it would be accurate to say that virtually every theme remarked upon by more than one key informant had been touched upon in previous research, whether it be the literature review or survey of HBKWs (if not both), with the interviews providing a good degree of assurance as to the pertinence of these themes. The novel exception to this would be HBKWs consideration of the **health and medical infrastructure** of a locale. A respondent said that, "the depth of detailed care in medical systems, especially if you need specialized medical treatment" of some kind can be a significant barrier if lacking and noted the lack of an emergency room in Port McNeill where she currently resides. It would be valuable for resources such as information on the Mount Waddington Health Network and the RDMW's

participation in the BC Rural Health Hub to be featured clearly in materials available to prospective residents.

Concluding Remarks and Next Steps

The respondents offered many more specific anecdotes and insights from their experiences related to the context for the RDMW project. These will not be lost but will be followed up on as HCS moves into the next phases of this HBKW project including the development of messaging, review of myvancouverislandnorth.ca website and drafting of an attraction campaign. Examples of successful practices/cases, other websites and materials, marketing and attraction campaigns will be reviewed for application to the Mount Waddington region. Also, any follow up information that the respondents committed to providing will be reviewed and applied accordingly.

The key themes from the interviews, combined with the literature review and online survey responses will be used to formulate a set of questions to use at an upcoming focus group to round out the primary research phase of this project. After the focus group, HCS will complete a research report that brings together the findings of all of its research that ends with implications and recommendations for messaging and an attraction campaign.

ANNOTATED BIBLIOGRAPHY

The following literature was reviewed and informed this Secondary Research and Quantitative Analysis Report. Key points from most of them are highlighted. All of these documents were reviewed and informed, to varying degrees, the secondary research and quantitative analysis, including findings and recommendations offered at the end of this report.

Altman, E.J., Kiron, D., Schwartz, J. & Jones, R. (2023). The Future of Work Is Through Workforce Ecosystems. MIT Sloan Management Review. Building Tomorrow's Workplace: The Work⁄23 Collection. Virtual Summit on the Future of Work. https://s3.us-east-1.amazonaws.com/marketing.mitsmr.com/offers/Work23/MITSMR-Work23-Future-of-Work-Collection.pdf.

The world of work is moving away from traditional employer-employee relationships at ever increasing speed. This article considers the increasing use of workers who are not employees and discusses issues to develop a workplace ecosystem that will allow companies, workers and others to thrive in this new environment.

Association of British Columbia Marine Industries; R.A. Malatest & Associates Ltd. (2016). BC Industrial Marine Sector Phase 1 Sector Engagement Project. Available here: https://www.workbc.ca/sites/default/files/Industrial-Marine_Assoc_BC_Marine_Industries_Engagement-Report_Oct16.pdf.

This now dated document offers an example of the sector specific labour market information provided by WorkBC. It describes the labour market challenges faced in industrial marine activity as in so many other sectors and outlines the need for further research and action.

BC Chamber of Commerce. (2023, May 17). 2023 Regional Roadshow, Vancouver Island / Gulf Islands. [Presentation]

Mario Canseco of Business in Vancouver presents the results of a survey conducted in October, 2022 of 948 business owners in BC including 160 on Vancouver Island and the Gulf Islands. The key concern in BC was the lack of workers and rising wage levels, but increases in other costs of doing business were also noted. Nevertheless, 78% were optimistic about the future of their business.
On Vancouver Island and the Gulf Islands, a majority of business owners are concerned about property taxes and feel that local governments are not supportive of business. The lack of affordable housing is a major issue for over half and about a third would like better access to capital. Still over four out of five are optimistic about their own business prospects.

BC Council of Forest Industries (COFI). (2019). 2019 Forest Industry Economic Impact Study. Available here: https://cofi.org/wp-content/uploads/REPORT_COFI-2019-FOREST-INDUSTRY-ECONOMIC-IMPACT-STUDY-FOR-WEB.pdf.

The overall economic impact of the forest industry in BC is described in this report. It measures forestry's share of provincial output (GDP) and the direct, indirect and induced jobs generated by forestry. The geographic division only goes to the Vancouver Island/ Coast region. In this region, forestry contributed $2.16 billion to GDP, resulted in 15,864 jobs providing $$1.36 billion in wages. Government revenue is noted as is the contribution it makes to health care and other government services. Issues of sustainability and Indigenous relations are covered.

BC Landscape & Nursery Association and Roslyn Kunin & Associates, Inc. (2018). BC Agriculture-Horticulture & Landscape-Horticulture Sectors Labour Market Information Study. Available here:

BC's horticultural sector provides useful parallels to other sectors in the provincial economy. Labour market research indicated worker shortages and gaps in key skills and training. These have a negative impact on the sector and its prospects. The existence of many small employers, changing consumer demand and changing technology present challenges that are also found in other industries.

BC Landscape & Nursery Association and Roslyn Kunin & Associates, Inc. (2019). British Columbia Horticulture Workforce Strategic Plan.

The resulting strategic plan included developing an appreciation for the industry, creating an environment that welcomes change and innovation, providing support and tools for workers and employers and involving the Indigenous community. Appropriate organizations and structures must be in place to deliver results.

BC Marine Trails (BCMT). (2019). Cape Scott Marine Trail Plan

BCMT's mission is to link the entire BC coastline through a series of marine trails and upland sites, and to promote sustainable water-based public recreation. This particular plan details the phases in which the trail would be mapped, and its recreation values to be assessed.

BC Hydro. (2012). Integrated Resource Plan.

The presentation outlines BC Hydro's assessment of future demand for electricity consumption in the province, and puts forward recommendations.

BC Salmon Farmers Association. (2021). Innovation and Technology Report: 2021 Update. Available here: https://bcsalmonfarmers.ca/wp-content/uploads/2021/07/BCSFA_Tech_Document_2021_F.pdf.

This update describes the innovative and technological solutions that salmon farmers have available to deal with issues like the prevention and treatment of sea lice, clean energy adaption, processing waste water, feeding systems and others.

BC Salmon Farmers Association. (2023). BC Salmon Aquaculture Transition: Then & Now. Available here: https://bcsalmonfarmers.ca/wp-content/uploads/2023/01/BCSFA_Transition_ThenNow_Report-1.pdf

This report provides information about the historic and current practice of salmon farming including siting, containment systems, feeding systems, feeding ingredients, use of antibiotics, vaccine programs, fish health testing, sea lice prevention and treatment strategies, and wastewater treatment. These facts are meant to show how the sector strives to achieve the highest standard for environmental performance. Through its development of a new framework for sustainable salmon farming (Net Pen Transition Plan), DFO is expressing a strong and clear vision for the future of the sector. In response, this report presents the sector's reflections and recommendations regarding the Framework for Discussion document.

BC Shipbuilding and Ship Repair Board (SSRB). (2014). The BC Shipbuilding and Ship Repair Career Kit. Available here: https://www.workbc.ca/sites/default/files/Industrial-Marine_Implementatio_Career-Kit_June14.pdf.

This tool provides all the information necessary for those who are considering a career in shipbuilding. It covers occupations, wage rates, training requirements unions etc. and is an example of the excellent labour market information and career guidance that already exists at WorkBC and other sources

BC Stats. (2012). British Columbia's Fisheries and Aquaculture Sector, 2012 Edition. Prepared for the Department of Fisheries and Oceans Canada.

Profile of the sector – real GDP, employment, revenue, earnings and income, consumption of fish and seafood products, international trade.

Bosire, J. (2013). 'Namgis First Nation Tourism Development Strategy.

A regional scan of the tourism landscape shows an increasing trend in the number of tourists both at the local and regional level. Particularly, the 2012 visitation statistics from the local visitor centres, the BC ferries terminal, Telegraph Cove resort and the Whale Interpretative Centre indicate that many visitors in the region do not stop in Alert Bay, and thus highlight the existing opportunity for Alert Bay to attract the visitors already in the region. The key findings of the Alert Bay visitor socio-demographic profile are that the visitors are predominantly from Canada, mainly travel by road, visit the community for a few hours and prefer deeper Aboriginal tourism experiences.
Despite the abundance of cultural tourism assets, the 'Namgis Nation faces a number of challenges in moving the industry forward. These challenges include, but are not limited to: accessibility, smaller tourism market segmentation, need for more capacity and training of tourism entrepreneurs, need for increased levels of consistency and professionalism in tourism service provision, seasonality of the tourism industry, lack of a unified tourism platform to leverage economies of scale, lack of product offerings tailored to different demands of the tourism market, lack of a consolidated market for Alert

Bay tourism brand, and limited access to funding. In addressing some of these challenges, this report emphasizes the importance of Alert Bay understanding its tourism market by conducting a regional survey that will inform about particular tourist preferences and characteristics.

Cadence Strategies. (2014). Vancouver Island Regional Aboriginal Tourism Strategy. Aboriginal Tourism Association of BC.

This report documents the growth of Aboriginal tourism activities and employment as a result of increased demand for authentic Aboriginal tourism experiences. First Nations in the Vancouver Island tourism region have the opportunity to secure tangible community benefits from the development of a tourism economy. Thoughtful and respectful tourism development offers not only economic gains from employment and entrepreneurship but also supports the social and environmental objectives of communities by providing opportunities to be on the land, to learn and share the Nation's history and culture and to steward and monitor impacts on the land and waters. The report includes a SWOT analysis of the sector, identifies success factors, and develops strategies to achieve the goals.

Campbell River Community Foundation. (2022). Campbell River's 2022 Vital Signs. Available here: https://crfoundation.ca/wp-content/uploads/2022/10/CRCF-VitalSigns2022-web.pdf.

Vital Signs® is a national program led by community foundations and coordinated by Community Foundations of Canada. Vital Signs® leverages community knowledge to measure the vitality of our communities and support action towards improving the quality of life. This report provides information about 13 different issue areas that influence community wellbeing. Each issue area, starting at Arts & Culture and ending at Work & Economy, includes 4-5 indicators and relevant community survey responses. The geographic coverage of the study is Campbell River, it is "greater Campbell River" – the Campbell River Census Agglomeration, which includes the City of Campbell River, Strathcona Area D (Oyster Bay-Buttle Lake), and the Campbell River 11, Quinsam 12, and Homalco 9 reserves. In some instances, data from Quadra Island, Cortes Island, and Sayward has also been presented.

Campbell River and District Division of Family Practice. (unknown). Campbell River & District Physician Welcome Package - Orientation Information for New Physicians to the North Island. Available here: https://divisionsbc.ca/sites/default/files/57290/Physicians%20Orientation%20Manual%20-%20January2021%20-%20FINAL.pdf.

The Campbell River & District Division of Family Practice (Division) was formed in August 2013 and is a local non-profit society of community-based primary care physicians. This brochure lists the resources on medical facilities in the Division's jurisdiction.

Canadian Agricultural Human Resource Council. (2021). How Labour Challenges Will Shape the Future of the 'Aquaculture' Industry. Available here: https://cahrc-ccrha.ca/sites/default/files/2021-11/AQU_F2_Reduced size.pdf.

This report looks at labour needs for the aquaculture industry in Canada out to 2029. Aquaculture is a small part of the overall agriculture industry, but it is the fastest growing. However, growth, output and income are all seriously constrained by the lack of labour in spite of stable earnings and shorter hours than in other agricultural occupations. Many jobs are unfilled and some employers report getting zero applicants to job postings. The labour force is also young, a challenge given Canada's current demographic trends. Demand for the product is growing world wide, but this demand cannot be met as the sector cannot expand without a growing labour supply. The only solution suggested in this report is to allow the sector access to temporary foreign workers which it currently does not have.

Canadian Federation of Independent Business (CFIB). The 8-Day Workweek: the impact of labour shortages on the number of hours worked by Canada's small business owners. Available here: https://www.cfib-fcei.ca/hubfs/research/reports/2023/2023-04-8-day-workweek-EN.pdf.

Here, CFIB reports that the average Canadian works about 35 hours a week; the average small business owner works about 48 hours a week, but if those small business owners are unable to staff to the desired level they end up working over 50 hours a week – 60 if in the hospitality industry. In addition to the very long hours, business owners often must turn away customers. Reducing the time and red tape needed to bring in foreign workers would help with this problem as small business does not have the resources to deal with lengthy bureaucratic procedures.

City of Campbell River. (2019). Community Profile.

Although in need of updating this profile provides the structure of Campbell River and clearly outlines its advantages for residents and businesses. It concentrates on the key sectors of aquaculture, technology and culture, forestry and tourism. It defines how the needs of the population are met with the availability of affordable housing, transportation, health care, education, connectivity, etc. With the addition of 2021 census data and current prices, this will remain a useful tool.

City of Campbell River (2021). State of Campbell River. Available here:

This report provides a review of the economic activities in the City of Campbell River in forestry, aquaculture, tourism, and future-forward industries. It discusses population trends and overall economic conditions in the City. It also presents information on affordability. In addition to commentary, views on short-term outlook in the general economy, as well as the sectors focused, are presented.

City of Campbell River. (2022). 2021 City of Campbell River Annual Report. Available here: https://issuu.com/cityofcampbellriver/docs/2021_annual_report_final_-_single_pages_-_high_qua.

This report describes Campbell River as vaccines were rolled out and the pandemic wound down. It includes strategic priorities which emphasise business vitality and economic development. It notes that all construction projects completed were on budget and recognizes an award for financial

reporting. Other factors reported included relations with the Indigenous communities, safety and health measures and a high level of citizen satisfaction.

City of Campbell River Economic Development. (2022). Economic Update Report: Released October 2022. Retrieved at https://campbellriver.ca/docs/default-source/business-economy/2022-economic-update---final-(2)e0c80d4f53fb62a298dbff000088bbe5.pdf?sfvrsn=77336f08_0.

This concise and very current report looks at patterns and trends in population, development, housing and real estate, and travel and tourism. It describes positive growth but notes constraints especially difficulties in attracting workers. Resources available to help alleviate these shortages are mentioned as is the TECHatchery which focuses on developing future oriented industry to Campbell River. Two updates of this report are to be produced in the near future.

City of Pitt Meadows. (2009). Site Selector Database.

Community profile of the City, using Census data and other data sources.

Coast and Marine Planning Branch. (2004). Quatsino Sound Coastal Plan. Government of British Columbia.

This policy document intended to provide direction for provincial tenure approval in the intertidal and nearshore environment of the Plan Area and policy guidance for Fisheries and Oceans staff within the Quatsino Coastal Management Area.
The coastal communities of North Vancouver Island have experienced significant economic decline and population loss due to reductions in industrial forestry, mining and commercial fishing. These communities are looking for opportunities to diversify and expand their economies in a sustainable manner that will protect local ecosystems. The Quatsino Sound Plan Area supports a range of economic activities. These include various commercial fisheries, finfish aquaculture, shellfish aquaculture, log handling and storage, marine transportation, and tourism. It also contains an array of sensitive resources and cultural values. Through coastal plans such as this, the Ministry of Sustainable Resource Management (MSRM) identifies development opportunities and provides land management that fosters economic development and environmental conservation. These outcomes should benefit coastal communities of the North Island as well as the province.

Counterpoint Consulting Inc. (2022). RAS Salmon Farming in British Columbia – Economic Analysis & Strategic Considerations.
https://www2.gov.bc.ca/assets/gov/farming-natural-resources-and-industry/agriculture-and-seafood/fisheries-and-aquaculture/aquaculture-reports/ras_salmon_farming_in_bc_-_economic_analysis__strategic_considerations.pdf.

In response to the federal government's plan "… to create a responsible plan to transition from open net-pen salmon farming in coastal British Columbia waters by 2025…," the provincial government commissioned this study to conduct an economic analysis of farming salmon using recirculating aquaculture system (RAS) technology and to investigate and prioritize strategic considerations to attract, encourage, and support the growth and development of RAS salmon aquaculture in BC. In this report, a generic economic model of RAS salmon farming in BC is presented, focusing on three differentiators specified in the Statement of Work:

- Species produced (Atlantic salmon or steelhead trout).
- Farm size (1,000, 5,000 or 25,000 tonnes annually).
- Farm location (Lower Mainland or Prince George)

The study concludes that farming Atlantic salmon and steelhead profitably using RAS presents many challenges. Regulatory uncertainty, high capital cost, low returns on investment, and lack of incentives to locate in British Columbia remain the primary constraints challenging the development of RAS salmon farming in BC.
The capital cost is a major impediment. BC has a diverse aquaculture sector that includes significant volumes of salmon produced in open net-pen (ONP) systems. RAS production currently represents <1% of BC farmed salmon production. To replace current ONP salmon production with RAS production would require financing the development of 90,000 tonnes of RAS Atlantic salmon production. Based on the study's model of a medium farm, whose capital cost equals $20 per kilogram of production capacity, that would require a capital investment of $1.8 billion.

Conference Board of Canada. (2012). Alberta's Rural Communities: Their Economic Contribution to Alberta and Canada. Alberta Agriculture and Rural Development.

Rural Alberta's population has growing, so has rural Alberta's economy and employment. Moreover, the economic contribution of Alberta's rural communities is more than the sum of its GDP. Economic activity in rural Alberta also contributes to economic activity in urban Alberta and in the rest of the country. The Conference Board of Canada estimated that rural Alberta's combined direct, indirect and induced contribution to the province is was $68.1billion in 2006. Despite the relatively healthy economy, rural Alberta still faces several challenges going forward. Aging population poses a potential concern. Therefore, any plans to ensure prosperity for rural Alberta must include the attraction and retention of people as a top priority. This is a key ingredient to the sustainability not only of Alberta's rural communities, but of all rural communities across Canada and across the developed world. It will take more than jobs to succeed at attracting people. Communities that can also offer a high quality of life will be the most successful, such access to healthcare, access to education, access to high-speed Internet, public safety, and vibrant arts and culture.

Community-to-Community (C2C) Forum. (2016). Event Report on North Island Tourism Forum: Community-to-Community Gathering

Action plans to develop Aboriginal tourism

Design Nine. (2014). Solving the Broadband Bottleneck. The Regional District of Mount Waddington.

This report presents the statistics on the lack of broadband and how it affects different aspects of life for both businesses and workers located and resided in Northern Vancouver Island. The report also makes recommendations on pathways moving forward.

Destination British Columbia. (2015). Vancouver Island North Tourism Plan.

Destination British Columbia. (2018). North Island Destination Development Strategy. https://www.destinationbc.ca/content/uploads/2019/05/North-Island-Destination-Development-Strategy_Final.pdf

The strategy is one of three that has been prepared for Vancouver Island and one of 20 for the province as a whole. The situation analysis and strategy were developed over a nine-month period and based on an extensive, collaborative process. The situational analysis comments on the limited amount of data available for the local tourism market. Its 10-year strategic plan is built on six themes with 47 objectives.

District of Port Hardy. (date unknown). Growing Towards Economic Sustainability: Sector Profiles of the District

District of Port Hardy. (2011). Plan the Adventure Ahead: District of Port Hardy Official Community Plan.

This Official Community Plan as adopted as bylaw no.15-2011, provides a framework to guide the direction of the community. The components involved in a community plan include: character of existing and proposed land use and the servicing requirements for the area; guidance for economic, environmental, physical design and development and social considerations; direction for quality of life, health and well-being; future growth and housing needs; community energy auditing and management; transportation network and strategy; community development; and provision of amenities and services.

Ference Weicker & Company Ltd. (2009). Vancouver Island Collaborative Workforce Strategy.

Hiring, developing and keeping effective employees is one of the greatest challenges that employers face. As such, a major priority for Vancouver Island Economic Alliance (VIEA) is to ensure that organizations will have access to the skilled people whom they will require as the economy develops and diversifies over time. Towards that end, this report is to assess the human resource needs of key industry sectors, review the current and projected labour market supply, identify gaps, and work with key stakeholders to prepare a comprehensive labour market strategy which will address current and future needs.

Finlayson, J. (March 24, 2023). B.C. labour market remains tight…and vacancies continue to abound. (Posted in: Competitive Economy section of the Business Council of British Columbia's site).

Available here: https://bcbc.com/insights-and-opinions/b-c-labour-market-remains-tight-and-vacancies-continue-to-abound

The webpost by BC Business Council's Jock Finlayson presents the statistics on job vacancies and wage rates of jobs unfilled, along with employment growth in the province.

First Nations Technology Council, Information and Communications Technology Council, Reciprocal Consulting Inc. (2022). Indigenous Leadership in Technology: Understanding Access and Opportunities in British Columbia. Available here: https://technologycouncil.ca/wp-content/uploads/2022/12/FNTC-ILIT-Report_2022-1.pdf.

While the digital economy in Canada is quickly expanding, accelerated by the COVID-19 pandemic and increased reliance on digital technology, there are few labour market intelligence (LMI) tools that meet the needs of Indigenous communities. This report fills that gap by implementing data collection tools relevant to Indigenous communities and producing information to enable access to opportunities in technology. The purpose of the Indigenous Leadership in Technology (ILIT) report was to explore the key priorities related to technological capacity-building in Indigenous communities across British Columbia. Key priorities came from the perspective of BC employers and current representation of Indigenous Peoples in technology in British Columbia when discussing barriers and enablers for including Indigenous people in the technology sector workforce. Findings related to underlying factors that perpetuate the under-representation of Indigenous people in technology sector jobs were explored along with opportunities for Indigenous leadership in technology through workplace cultural safety and hiring practices, Indigenous-led education, entrepreneurship and procurement, community–industry partnerships, and telecommunications infrastructure.

Although this report is provincial in scope, it is unique in that it deals with the relationship between the technology sector and the Indigenous population. Indigenous people make up a significant part of the actual and potential labour force of the CR/MWRD/SRD area and the application of technology is essential in all present and future developments.

One weakness in this study is that it seems to consider that the demand for tech workers will only be in tech related industries such as information and communication. It does not recognize that all sectors including those that have not been thought of as tech related such as tourism will increasingly be using technology, often with an AI component, and will need appropriate staff.

The report covers the well-known barriers faced by Indigenous communities and people in all sectors such as remoteness and lack of skills. It goes on to mention the specific challenges in the tech sector. The biggest is insufficient connectivity in many Indigenous communities.

"Wise practices" are suggested that would benefit Indigenous people, the tech sector and the economy as a whole. These would include Indigenous people and organizations determining for themselves the priorities and opportunities in tech related fields; the recognition that advancing the tech sector in Indigenous communities is enhanced by the possibilities of remote work and benefits everyone; and the need that the systematic, workplace and interpersonal barriers that Indigenous people face in all sectors need to be dealt with.

Francis, B., Sherson, G., Goodison, A., Singbeil, D. and T. Browne. (2013). Economic and Technological Assessment of Biomass Residual Feedstock Options for the Campbell River Area. FPInnovations. Prepared for Ministry of Jobs, Tourism and Skill Training.

Techno-economic assessments have been conducted on potential options or “bio-pathways” for using biomass feedstock from forest residues in the Campbell River area. The objective is to evaluate the technical and economic viability of potential investment opportunities and provide a means of comparing them on a common basis. These assessments included product prices, capital investments and operating costs. The feedstock was harvest residues.

The report concludes that power and combined heat and power have moderate capital cost and low technical risk. Torrefied pellets and pellets have low capital cost and technical risk. There are well-established markets for pellets in Europe and power in British Columbia. Pyrolysis oil and acetate by biomass gasification have higher capital cost and technical risk as there are no commercial installations.

go2HR. (2022). BC’s Tourism and Hospitality Labour Recovery Framework (LRF). Available here: https://www.go2hr.ca/strategy/labour-recovery-framework

Once implemented, the pillars described in this infographic will indeed lead to solutions to the human resource challenges that have been limiting the tourism sector. The pillars include:

1. Growing the labour supply by removing barriers to entry and maintaining and retaining those who are already there.
2. Communicating tourism’s contribution to the BC economy and to the job base.
3. Generating a greater understanding of the impact of housing availability and affordability on the labour supply for hospitality.
4. Providing advisory services on human resources and workforce development.
5. Focusing on future training needs to insure that such training is applicable and available and that employers recognize this.
6. Finding, sharing and piloting technology to help the sector invest in people and products.

Steps for implementation are listed for each pillar labelled green (already happening) red (no action yet) and yellow (in between). Issues around housing and connections with secondary schools are still red.

Tourism and hospitality associations were involved in developing theses pillars. Their ongoing involvement will be needed to continue implementation.

go2HR; Qatalyst Research Group. (2022). BC Tourism and Hospitality Labour Market Information (LMI) Research Project. Available: https://www.go2hr.ca/wp-content/uploads/2023/04/Final-LMI-Report-March-29-2022.pdf.

This document, the final LMI report, represents one of a series of deliverables that have created during the project. The report uses primary data (principally a survey of employers and employees in the industry), literature, secondary data (principally Labour Force Survey data reported by Statistics

Canada) and employment projections prepared by the Conference Board of Canada to describe the labour market, the impact of COVID-19, and the outlook for the labour market over the next five years, by region and province wide. It also outlines actions that the industry and its major stakeholders could take to ensure an adequate workforce during and after the industry's recovery from the COVID-19.

Government of British Columbia. (2006). Primer on Regional Districts in British Columbia.

This paper provides background on the development of regional districts in British Columbia. Regional districts are a unique feature of the British Columbia local government system which date back to the early 1960's.

Government of British Columbia. (2008). British Columbia Seafood Industry Year in Review 2008.

Government of British Columbia. (2020). 2019-2020 Economic Plan: A Framework for Improving British Columbians' Standard of Living.

The BC Government's 2019-20 Economic Framework provides the pathway for British Columbia to be successful in the world – building on the strength of our people and our geographic location at the crossroads of Asia and North America to grow a clean and vibrant future. It is about implementing a sustainable approach to what we call quality economic growth. This means growth that fits within our CleanBC plan and can lever the competitive advantage of our legacy of clean, affordable, firm hydroelectricity to decarbonize British Columbia's economy without sacrificing our standard of living. The framework also provides the opportunity to address inequities, leading to a fairer, more inclusive and more prosperous society. Our framework will provide the conditions for business to succeed, and the framework to ensure that the benefits of growth are fairly shared among our people, including Indigenous people.

Government of British Columbia. (2023). StrongerBC: Future Ready Action Plan. https://news.gov.bc.ca/files/Future-Ready-May2023.pdf.

This just released report describes the specific actions the government plans to implement to make BC ready for the future. They will upgrade the labour force by making post-secondary education more accessible, affordable and relevant, thus increasing the supply of labour and providing people with more opportunities to succeed. Not only will they increase the number of training spaces available. They will also insure that the training covers the skills that are needed by employers to make BC competitive and productive. Emphasis will be placed on the priorities of Indigenous people. Newcomers to BC will have an easier path to employment including faster assessment of credentials for the badly needed professionals that come here.

Growing Malcolm Island Project. (2014). Our Economic Development Plan.

This plan was developed by the residents of Malcolm Island. The process was managed by a volunteer steering committee and technical planning support was provided by EcoPlan.

GSGislason & Associates Ltd. (2011). The Marine Economy & the Regional District of Mt. Waddington in BC. Prepared for Living Oceans Society & Regional District of Mt. Waddington.

The study identifies the economic importance of a wide range of private sector marine-based activities on the economy of the Regional District of Mount Waddington: commercial fisheries, aquaculture, marine recreation (sport fishing and others), as well as marine transport. The report finds that the influence of the ocean on the lives and livelihoods of RDMW residents is more pervasive than indicated by market-based economic measures. The ocean is integral not just to the economy, but also to the culture, way of life, and collective identity of the region. The ocean environment provides significant benefits to First Nations through seafood harvesting activities. The ocean also provides key ecosystem services that underpin many of the identified industries and make coastal life as we know it possible.

GSGislason & Associates Ltd. in Association with Archipelago Marine Research Ltd. and Edna Lam Consulting. (2010). Economic Impacts from a Reduced Groundfish Trawl Fishery in British Columbia. Prepared for BC Ministry of Environment, Oceans and Marine Fisheries.

The trawl fishery for groundfish and hake is very significant to the economy of the province and in particular to the economies of Ucluelet, Port Hardy, Prince Rupert and Port Alberni. The trawl sector is by far the largest fishing sector in the province in terms of catches, revenues, and employment on boats and in plants. This report documents the direct contribution of this sector to the provincial economy as well as the multiplier effects. It identifies the external factors that have contributed to the decline of the sector. In spite of the decline, the report concludes that the sector is important not only in terms of its direct contribution to regional economies but also in terms of providing the year-round infrastructure platform that allows seasonal fisheries sectors, such as sardines, dogfish, lingcod, and halibut, to access needed shore services. The loss of the trawl fishery would not only cause the loss of the substantial economic benefits from trawl activity, but also cause several millions of dollars more in losses from negative impacts on other fisheries.

GSGislason & Associates Ltd. in association with Ellen F. Battle Consulting Inc., Edna Lam Consulting, and Pierce Lefebvre Consulting. (2007). Economic Contribution of the Oceans Sector in British Columbia.

The study defines, describes, and quantifies the various market (commercial) activities that comprise B.C.'s ocean sector, and estimates in a consistent manner the direct, indirect, and induced impacts of these commercial activities to the B.C. economy. It further assesses the growth potential of the ocean sector – to illustrate the economic potential of some other ocean sectors, in particular offshore oil and gas development and offshore wind power generation.

Harbour Digital Media. (2016). Labour Market Partnership: Phase 2 – Final Labour Market Information Research Report.

The Vancouver Island Manufacturing Sector Advisory Board (VIMAB) commissioned this LMI study on Vancouver Island/Coastal region manufacturing sector which was conducted from January –

June 2016. The research was undertaken as a part of Phase 2 of a labour market partnership (LMP) involving companies in the sector and region with the support of the BC Ministry of Jobs, Tourism, and Skills Training. Both secondary data collection and primary research was conducted. From the primary research these were issues that will need to be addressed.
1. Skills Shortage – primary research revealed the specific type of jobs and skills that employers had difficulties to fill.
2. Quality and Availability of Training – employers were generally dissatisfied with the quality and availability of training in the region and more broadly in the province. Manufacturers question the quality of graduates of BC's educational institutions and their readiness to work on the job in a manufacturing setting. Manufacturers cite a lack of collaboration on the part of BC's educational institutions as a part of the problem and are concerned that institutions are not working with industry to understand their needs and customize programs to address these needs.
3. Changing Nature of Work – Companies have difficulties maintaining a workforce that is more diverse than before. The ability of companies to adapt to the shifting expectations of a diverse workforce while at the same time maintaining a culture that values high levels of performance and quality is also a challenge.
The report ended with some preliminary discussion and directions for strategic planning, including the potential development of a Manufacturing Centre of Excellence that can be used to create the collaborative framework that is needed by the manufacturing sector in the region.

Healthcare Excellence Canada, in partnership with the Canadian Institute for Health Information. (2023). Promising Practices for Retaining the Healthcare Workforce in Northern, Rural and Remote Communities. https://www.healthcareexcellence.ca/en/resources/promising-practices-for-retaining-the-healthcare-workforce-in-northern-rural-and-remote-communities/

This website offers useful examples of what actual isolated communities are doing to retain healthcare professionals.

Human Capital Strategies. (2010). North Island Coordinated Workforce Strategy: Supporting Economic and Employment Growth in the Mount Waddington Region - A STRATEGY FOR IMPLEMENTATION

This document provides the rationale for and outlines the elements of a proposed North Island Coordinated Workforce Strategy. An extensive labour market analysis, a regional employer survey, four local stakeholder action planning sessions, two well-attended stakeholder forums and several Steering Committee meetings and discussions constitute the methodology for developing the Strategy.

Human Capital Strategies. (2019). An Assessment of Marine-Related Sector Training & HR Needs on North Vancouver Island – Marine Plan Partnership (MaPP) Final Report

The report describes the results of an Assessment of Training Needs and Opportunities for Marine Industry Sectors Operating in the North Vancouver Island (NVI) Sub-region.

This report first examines the demographic, labour market and industrial structures of North Vancouver Island (NVI) before turning to the marine related components. The sector is seen as relatively stable with potential policy issues such as the environment and fishing generating some uncertainty. As in many other sectors in NVI, job vacancies are foreseen – about 190 by 2028.Most of these require significant and specific training. The recommendations are similar to those suggested for other sectors. They include the development of a labour market strategy, involving employers and governments, working with underrepresented components of the labour force and ensuring that training and the funding for same is available.

Human Capital Strategies. (2021). Home Based Knowledge Worker (HBKW) Attraction Campaign Project. Prepared for Regional District of Mount Waddington.

Modern technology and the pandemic have clearly demonstrated that work is no longer a place, especially for knowledge workers. This report looks at how RDMW can attract and retain HBKWs. It covers where they are likely to come from and what sectors they are in. It notes what steps should be taken to succeed including branding, messaging and ambassadors for these occupations and the region. It also notes the recent factors that are encouraging workers to move to places like MSRD and to work from home.

Human Capital Strategies & Associates. (2011). Campbell River Workforce Development in Rural Transitioning Economy Project. Prepared for the Campbell River & District Chamber of Commerce.
https://niefs.net/publications/CRLMP2011.pdf

The Campbell River and District Chamber of Commerce (CRDCC) announced the launch of the Workforce Development Within a Rural Transitioning Economy project, an initiative that also encompassed other community priorities such as business retention and economic development. The goal is to describe the employer base of the Campbell River area and occupations that are in demand, transition, or decline and the needed skills and training for these occupations as a vital component of creating a business-enabling environment. Secondary goal is to develop strategies based on research and consultations with key stakeholders in order to address the imbalance between the skills, abilities, and development potential of the available local labour force supply and demands of local existing businesses and emerging industry sectors.

After a long period of fairly stable resource based activity, this report looks at a changing and expanding role for the Campbell River economy. Forestry remains important as does tourism and the health sector. Construction plays an on-going role. Opportunities exist in aquaculture, clean energy and culture. Education is important, not only as a sector in its own right, but also for the essential contribution that education and training must make to ensure an adequate supply of suitable labour for all sectors, and also to provide jobs for the population of a thriving community. Employers and other community groups must work together to develop an appropriate labour force. This work must be supported by a complete and up to date data base of labour market information.

This study from 2011 provides an excellent basis on which further advancement can be built. It identified the four key sectors on which the current project is based, the role for employers in meeting labour force needs, the need for good information and data bases and the groups that would have a role to play in implementation.

InterVISTAS Consulting Inc. (2008). Vancouver Island and Sunshine Coast Region Air Transportation Outlook Final Report.

InterVISTAS Consulting Inc. was retained by the Vancouver Island Economic Developers Association (VIEDA) to develop a Vancouver Island and Sunshine Coast Region Air Transportation Outlook. The report assesses levels of service by defined regions and market sectors, identifies current levels of service, assesses airports' capabilities in the region and recommends development subject to detailed business case analysis. The report presents an overview of the socio-economic and demographic characteristics of the seven major Regional Districts contained in the study area. The examination of the availability and access to air services discussed in the report, established the basis for the development and enhancement of the airport system serving the study area.

Island Health. (2015). Vancouver Island North Local Health Area Profile.

J.K. Solutions and Lions Gate Consulting Inc. (2006). Business Plan. Prepared for South Peace Economic Development Commission.

The intent of this Business Plan is to provide the SPEDC with the organizational and strategic direction to guide them through the 2006 and 2007 with ongoing and longer term action items stretching into 2008 and beyond.

Larose Research & Strategy. (2014). Boatswains to the Bollards: A Socioeconomic Impact Analysis of BC Ferries. Report prepared for AVICC and UBCM

This report is an initial assessment of the relationship between BC Ferries passenger fares, ridership levels, and socioeconomic outcomes in coastal communities. Key findings include that, during a period of increasing fare, ridership has declined on nearly every route, with overall "peak-to-trough" ridership declining 11% from 2004/05 to 2013/14; that the Northern Route Group has witnessed the most severe passenger declines from 2003-2013 (approx. 20-40%), and these passengers are highly price sensitive; that the Minor Route Group has witnessed significant ridership declines on most routes (approx. 10 - 20%), and users of these routes are moderately price sensitive; and that the Major Route Group has had the lowest level of ridership declines (5-8%), but has also witnessed the lowest fare increases, suggesting that its users are among the most price sensitive in the system. Using a combination of historical trend analysis, statistical analysis, and comparative analysis, the impacts of ridership declines were assessed in socioeconomic areas such as population migration, business development, real estate prices & sales, employment, and others.

Legislative Assembly of British Columbia. (2022). Bill 36 Health Professions and Occupations Act. Available here: https://www.leg.bc.ca/content/data - ldp/Pages/42nd3rd/1st_read/PDF/gov36-1.pdf.

This Bill replaces the Health Professions Act. The primary objectives of the Bill are to prioritize protection of the public and to facilitate good governance by regulators.
Under this act, professional regulatory bodies will have the advancement of the best interests of the public as their first and most important purpose. Since shortages of medical personnel especially in smaller communities are a major concern of British Columbians at this time, we can expect to see measures that will increase the supply of such personnel. Easier, faster and less costly pathways for foreign trained professionals to be able to practice in BC are possible. The BC government has already taken steps in this direction with respect to nurses. It is also increasing the number of training spaces for doctors.

LMI Insight and R.A. Malatest & Associates, Inc. (2013). British Columbia Forest Sector Labour Market & Training Needs Analysis. Prepared for BC Coastal Forest Industry Labour Market Information Working Group.

This report was prepared for the BC Coastal Forest Industry Labour Market Partnership (LMP) Committee. The “forest industry” is traditionally defined through the North American Industry Classification System (NAICS) to include companies operating in forestry & logging (113), support activities for forestry (1153), wood products manufacturing (321) and pulp & paper manufacturing (322). The results and findings from this labour market study provide a comprehensive look at the current and forecasted needs of the BC forest industry and broader forest sector through 2022.

Mahboubi, P & T. Zhang. C.D. Howe Institute (2023). Empty Seats: Why Labour Shortages Plague Small and Medium-Sized Businesses and What to Do About It, Commentary No. 648
This excellent commentary provides a thorough and well documented description of the serious labour shortage issues that small and medium businesses face. It offers potential solutions which can be useful for the SME’s in the area of this study. These are reflected in this report’s recommendations.
Recommendations:
Take advantage of allgovernment programs and wage subsidies.
One example is the federal Sectoral Workforce Solutions Program which covers training, attraction and retention, equity and creativity. Government programs can provide funds and know-how to implement other recommendations.
Offer increased wages - This only works if the increase is sufficient to exceed the reservation wage of potential employees. The reservation wage is the one below which potential employees will not take a job. Smaller increases add to labour costs without alleviating labour shortages.
Make use of immigrants - Immigration should focus largely on skilled workers. The BC government’s current actions on immigrants no longer needing Canadian experience and better credential recognition processes will ease and speed the absorption of new arrivals into jobs.

Invest in technology and automation - It increases productivity and competitiveness and can help moderate the numbers of workers needed. The jobs generated are higher skilled and better paid.
Train, train, train - When labour shortages were not a problem, employers had two options to get the skilled workers they needed: make (i.e., train them yourself) or buy (hire in the open market). Now, when job vacancies equal or exceed available workers, the second option is no longer available. Training can be on-the job which works best for job specific skills. It can be on line and thus done remotely or off site. It should cover hard skills like digital literacy and use of technology. It can also be used to ease shortages in soft skills like problem solving and collaboration.
Improve human resource practices - Providing training is an excellent tool for attraction and retention. Being as flexible as possible about the location of work both attracts and keeps many workers on the job and is particularly useful in smaller and remote communities. Being flexible about the hours of work is especially attractive to those more loosely connected to the labour force like those with family responsibilities and retired people who no longer want or need full time, full year work. It goes without saying that being an equal opportunity employer, open to all people, is essential.
Attract people into the labour market - Certain 'non-traditional' workers (women, Indigenous, immigrants, etc.) have often faced discrimination in the work force and thus have tended to have below average participation rates. They are a useful pool of workers especially in jobs where high levels of training are not required. The above HR practices can help make them available to fill vacancies.
Use temporary foreign workers - This is a last resort to be used only when all other options have been exhausted. It is time consuming and not always timely.
Local governments can help - Implementing the above recommendations will tax the resources of small and medium businesses that often lack the time, the skills and the human resources needed to put them in place. Local governments, perhaps through business organizations like Chambers of Commerce, should make available to SME's offices with the experience and the expertise to enable small firms to make use of these recommendations.

Marinescu, M., Caldecott, T., & D. Röser. (?). Forest Biomass Opportunities and Challenges in Port McNeill, BC. FPInnovations.

This presentation material provides key attributes of biomass and provides information on how they can generate employment opportunities. It identifies Port McNeill's energy consumption in 2010 and presents opportunities on how the Port can utilize biomass to meet its energy needs.

Mark, K. (2023). Rethinking Your Recruitment Strategies. *Exchange* Spring 2023. Available here: https://irp.cdn-website.com/be9aba85/files/uploaded/ExchangeSpring2023-web%20Apr%2025.pdf.

Here, Mark outlines the changes that are now affecting recruitment for local governments. It takes longer to recruit people. Postings must now appeal to the values of workers and not just be job descriptions, etc. Special attention is paid to local governments recruiting in smaller centres. When

recruiting from outside, the whole family must be considered including housing needs. Good practices by Campbell River are mentioned.

Ministry of Finance. (2023). Budget and Fiscal Plan 2023/24 – 2025/26. Government of British Columbia

Ministry of Post-Secondary Education and Future Skills. (2022). British Columbia Major Projects Inventory Third Quarter 2022. Government of British Columbia.
Available here: https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/economic-development/develop-economic-sectors/mpi/mpi-2022/mpi_report_2022q3.pdf.
The value of major projects in the Vancouver Island/Coast region in Q2 of 2022 was $31 million, down 1% from the previous year. Projects already underway were mainly in the residential and government sectors. Proposed projects fell largely in accommodation, oil and gas, infrastructure, education and health. Employment growth in this region was stronger than in BC as a whole and population growth was concentrated more in the under 20 age group.

Ministry of Post-Secondary Education and Future Skills. (2023). British Columbia Labour Market Outlook: 2022 Edition. Government of British Columbia.
This comprehensive report provides the context in which the BC labour market will operate to 2032. It includes details of occupations, wages, industry, training requirements and geography. It projects over a million job openings in the decade to replace retiring workers and to fill new positions. Less than half this need will be met by labour force growth. Much of the remainder will be filled by immigration and in-migration, but that still leaves over 80 thousand openings for which there is no obvious source of workers. Currently there are more job openings in BC than potential workers. Job openings will be growing at a 1.5% rate on Vancouver Island Coast, higher than in the Lower Mainland. Over 80% of jobs will demand post-secondary education. The greatest demand for workers will be in the health care sector.

Ministry of Social Development and Poverty Reduction and BC Chamber of Commerce. (2023). Addressing the Labour Market Gap: Insight Report.
https://bcchamber-website.glueup.com/sites/default/files/content-files/BCCC.20230530.Addressing%20the%20Labour%20Market%20Gap%20Report.pdf.
This report notes that both employers and job seekers are not happy with the current labout market situation in BC. It is not surprising that the biggest concern for employers is finding sufficient qualified workers in locations where they are needed and at a salary they can afford. Job seekers who one would expect to be happy in a tight labour market feel that their expectations for salary, locations and working conditions (e.g., re hours and remote work) are not being met.

MMM Group. (date unknown). Taking Action in Trail, BC: the Challenges and Successes.

This presentation provides project summary – the project being describing challenges and opportunities to revitalize downtown Trail.

MQO Research. (2018). Labour Market Analysis of the Newfoundland and Labrador Aquaculture Industry. Prepared for the Newfoundland Aquaculture Industry Association (NAIA).

This report describes how the aquaculture industry contributes significantly to the GDP and offers diverse employment opportunities in Newfoundland and Labrador. In 2017, aquaculture production value in NL reached over $276 million, a more than 70% increase from 2015. This growing industry remains a key priority for the provincial government, but it is not without challenges. The research presented in this document was prepared as part of the foundational work for the development of the Aquaculture Recruitment Strategy for Newfoundland Aquaculture Industry Association.

Murphy, M. (2005). Regional District of Mt. Waddington (RDMW) Regional Harbours Initiative Final Report.

The report produced an inventory of the harbour properties in RDMW, and explored ways harbour authorities could work together regionally.

MWHN (2020). MWHN Transportation Needs Assessment & Strategy Summary & High Level Overview.

In 2019, the Mount Waddington Health Network (MWHN) commissioned a Transportation Needs Assessment and report. This report outlined existing transportation issues gathered through stakeholder interviews and a community working group. Additionally, a high-level transportation policy review of the Mount Waddington Regional District's relationship with BCTransit was done. The issues identified included – a lack of awareness volunteer transportation networks (VTN) services; access to affordable transportation options; instability, poor scheduling, and insufficient marketing of out-of-region public bus services; accessibility of ride-sharing services in rural areas; problematic coordination between existing transportation services; a need for community-based shuttle services for health services that goes beyond the scope of Wheels for Wellness.

Nanwakolas Council Society. (2016). Nanwakolas Training and Employment Strategy.

This report begins by looking at the land scape, labour market situation and community engagement in order to develop an employment and training strategy for the Nanawakolas people. Gaps to be filled in funding, skills, social supports and employer readiness to work with Indigenous workers are noted. Components of the strategy include leadership, co-ordination and management, increasing access to and completion of education and training, developing collecting and using data on skills and education, covering recruitment and placement of workers, supporting employers in dealing with Indigenous workers and monitoring, reporting and evaluating the results. Sub strategies are noted for each of the main components and tactics and action plans are listed.

Na̲nwak̲olas Council Society. (2020). Career Pathways Guidebook: Volume 1. Prepared by D. Bazowski and B. Cruise. Available here: https://nanwakolas.com/wp-content/uploads/2020/08/Nanwakolas-Career-Pathways-book-web-v2.pdf

This Guidebook looks at industry sectors that are all very active on Vancouver Island – forestry, tourism, and environmental stewardship. The contents have been built based on surveyed employers and educators/ trainers who support these industries to learn what jobs are most in demand to make their businesses successful. Employers also expressed what education, training, personal traits and interests are needed to advance your jobs and careers.

This clear and comprehensive guidebook was designed to advance the careers of the Nanwakolas people, but would be useful to anyone in the Campbell River, RDMW and SRD areas and beyond. It describes the basic skills needed for employment and how to get them. It offers specific and concrete advice to job seekers. It provides descriptions of the major industrial sectors in this area (e.g., forestry), and lists the occupations in each, concluding with examples of people who have established successful careers.

'Namgis First Nation and the Village of Alert Bay. (2015). Tides of Change – Cormorant Island Economic Development Strategy.

These strategies are developed by local residents.

Nordicity. (2018). VICEDA Technology Attraction Strategy. Prepared for Vancouver Island Coastal Economic Developers Association (VICEDA).

O'Neil Marketing & Consulting in partnership with Brian Payer (Ojibwe), Krista Morten, Dr. Peter Williams, and Roslyn Kunin and Associates. (2021). Indigenous Tourism Labour Market Research: Roots to a Future Research Findings 2020-21. Prepared for Indigenous Tourism British Columbia (ITBC). Available from https://www.indigenousbc.com/corporate/content/uploads/2021/06/REPORT-2020-21-ITBC-Labour-Market-Research-Report-2021-02-11_FNL.pdf

The report recognized the importance and potential of the Indigenous component of the tourism sector in BC. It demonstrated that many Indigenous people wanted to work in this sector, but could not find work. It also showed that many employers could not fill their positions and outlined reasons. Lack of housing and infrastructure was one reason for the gap. The report also includes a guide to solving the labour market imbalances.

O'Neil Marketing & Consulting in partnership with Brian Payer (Ojibwe), Krista Morten, Dr. Peter Williams, and Roslyn Kunin and Associates. (2021). Indigenous Tourism Labour Force Strategic Plan: Roots to a Future – Marking the Way to Indigenous Employment in Tourism. Prepared for Indigenous Tourism British Columbia (ITBC). Available from: https://www.indigenousbc.com/corporate/content/uploads/2021/10/REPORT-ITBC-Labour-Force-Strategic-Plan_2021-05-27.pdf

In late 2019, the Indigenous Tourism BC (ITBC) launched the Indigenous tourism labour project to develop a strategy to retain and increase Indigenous employment and identify skills development and training needs for the Indigenous tourism sector. It also outlines how to strengthen Indigenous people's employment in the industry, especially with Indigenous tourism operators, and to tackle tourism labour shortages. The purpose of this five-year strategy, covering the period 2022/23 to 2026/27, is to map the future of Indigenous people's participation in careers in the Indigenous tourism industry and with non-Indigenous tourism operators.

O'Neil Marketing & Consulting in partnership with Brian Payer (Ojibwe), Krista Morten, Dr. Peter Williams, and Roslyn Kunin and Associates. (2021). Indigenous Tourism Wise Ways: A Guide of Smart Practices to Attracting and Retaining Indigenous Talent. Prepared for Indigenous Tourism British Columbia (ITBC). Available from https://www.indigenousbc.com/corporate/content/uploads/2021/06/REPORT-2020-21-ITBC-Labour-Smart-Practices-Guide_2021-06-08_fnl.pdf

This guide is a quick reference tool for Indigenous and non-Indigenous tourism employers who are seeking proven 'Wise Ways' and 'Smart Practice' solutions to find, attract, hire, and retain Indigenous talent, and offers ideas to navigate operating challenges. It covers key areas of interest and concern identified by participants of the Indigenous Tourism BC Labour Research project surveys, focus groups and interviews, and features their advice, smart practices, and 'Wise Ways' that worked for them with the project team, and is supplemented with material from other research, studies, and guides.

Paul Rudden Consulting. (2019). West Coast Emergency Towing Needs Assessment.

Peacock, K. & Finlayson, J. (2023). The Foundations of Provincial Prosperity: A Review of What B.C. Exports to the World …. Today and In the Future. Business Council of British Columbia. Available here: https://bcbc.com/dist/assets/publications/the-foundations-of-provincial-prosperity-a-review-of-what-b-c-exports-to-the-world-today-and-in-the-future/2023_05_Exports-Paper.pdf.

In this timely review the Business Council of BC notes the importance of exports to the BC economy, presenting current export data and projecting it into the future. They see forestry related exports declining although resource exports in total are expected to remain strong. Tourism is only slowly recovering from the pandemic. Suggestions about policies to encourage export growth and thus the strength of the BC economy are given.

Pierce Lefebvre Consulting. (2013). Inventory of Economic Development Initiatives in the BC Central Coast and North Coast Regions-2013 Update.

In 2008, communities, private sector companies, First Nations, NGOs, and various government agencies were developing strategies and initiatives aimed at improving Human Well Being (HWB) on the BC Coast. At the time, the Ecosystem Based Management (EBM) Working Group commissioned the

writer to compile an inventory of these economic development initiatives. The purpose of this work is to update the inventory of economic development initiatives completed in 2008, identify new opportunities/ initiatives, and to examine whether previously identified initiatives and associated development support policies were successful in advancing economic development. This includes providing an update on the status of projects/opportunities identified in 2008 (or subsequently), identifying more recently emerging opportunities/initiatives, and through this, gaining an understanding of specific development opportunities and any hurdles being faced in acting on those opportunities.
Excellent discussion on the following aspects in the examination:
Policy barriers; Lack of / access to infrastructure; Lack of / access to human resources; Lack of / access to financial resources; Markets; and other barriers

Port McNeill. (2004?). Canada's Green Energy Jobs Start Here: Alternative Energy Vision for Vancouver Island North.
The RDMW has developed the Alternative Energy Vision to advocate and explain its position on the development of the renewable energy sector in its jurisdiction.

Port McNeill (2014). Port McNeill 2020: Our Economic Development Plan
Community profile as well as challenges and opportunities.

PricewaterhouseCooper. (2017). British Columbia's Forest Industry and the B.C. Economy in 2016.
Study commissioned by BC Council of Forest Industries, BC Lumber Trade Council, Coast Forest Products Association and Interior Lumber Manufacturers' Association. Used an input-output approach to estimate direct and total impact of the forest industry in B.C. – including forestry and logging, lumber; veneer, plywood and engineered and other wood products; and pulp and paper.

Quintry Management Consulting Inc. (2018). Recreational and Tourism Economic Development: an Implementation Project of the North Vancouver Island Marine Plan. Prepared for the Marine Plan Partnership, North Vancouver Island
This report presents the findings of the opportunities to enhance economic activity for coastal communities through expanding marine based recreation and tourism.

Qu'West Consulting Services. (2004). A Regional Economic Development Strategy For the Regional District of Mount Waddington.
The goal to this Strategy is to retain current jobs, and support activities and initiatives that will create new jobs, expand current businesses, and attract new investment, businesses or other economic activity to the region. It includes discussions of development in areas of forestry value added, shake shingle and wood salvage, non-timber forest products, salmon aquaculture, shellfish aquaculture, wild fish harvest, tourism, independent power plants, oil and gas exploration, and mining and aggregates.

Regional District of Mount Waddington. (2009). RDMW Regional Profile.

Regional District of Mount Waddington. (2011). Annual Financial Report.

Regional District of Mount Waddington. (2011). Annual Report.

Regional District of Mount Waddington. (2012). Building Capacity for Rural Jobs and Business – the case for improved telecommunications in the region.

The RDMW has developed this case to advocate and explain its position on the development of telecommunications in the region. The regional and municipal leadership of the region are focussed on pressing for rural telecommunications infrastructure improvements that will aid in the recruitment, retention and attraction of working families and entrepreneurs who expect and demand comparative services to urban centres and other jurisdictions.

Regional District of Mount Waddington. (2012). Forest Policy: Local policies and context for our most important natural resource.

Very detailed description of the forestry sector – AAC, tenure, major companies

Regional District of Mount Waddington Economic Development Commission. (2012?). Strategic and Operational Business Plan 2013-14

Provides good background information in terms of challenges and opportunities.

Regional District of Mount Waddington. (2015). Regional District of Mount Waddington Regional Plan 2015.

This document provides a community profile for the regional district. It also sets out the strategic goals in the regional plan, and policies dealing with climate change, relationship building with First Nations, growth management, as well as sectoral economic development in agriculture, marine, renewable energy, forestry, tourism and others.

Regional District of Mount Waddington. (2015). Staff Report on Regional Plan Update Discussion.

Discussed what the current policies of the Regional Plan are in a specific sector, and proposed policy updates.

Regional District of Mount Waddington. (2015). Draft Policy Manual

Regional District of Mount Waddington. (). RDMW Bylaw 674.

RDMW Bylaw 674 is to adopt a Regional Plan. In the Reginal Plan itself, there is description of what the local names are for the four electoral areas (A-D) and names of the Indigenous communities, if we need them for any reason.

RIAS Inc. (2021). Consequences of the Decision to Shut Down Salmon Farming in the Discovery Islands. Prepared for BC Salmon Farmers Association. Available here: https://bcsalmonfarmers.ca/wp-content/uploads/2022/12/BCSFA-RIASINC-Final-Discovery-Islands-Damage-Report.pdf.
On December 17, 2020, the federal government announced its intention to:

1. Phase out existing salmon farming facilities in the Discovery Islands, with the upcoming 18-month period being the last time this area is licenced;
2. Stipulate that no new fish of any size may be introduced into Discovery Islands facilities during this time, starting immediately;
3. Mandate that all farms be free of fish by June 30th, 2022, but that existing fish at the sites can complete their growth-cycle and be harvested before that date.

This report examines the financial, economic, and social consequences of this decision for workers, families, businesses and communities in the Discovery Island region and for the province.

RIAS Inc. and BC Salmon Farmers Association (BCSFA). (2022). What Salmon Farming Licence Renewal Means to B.C.'s Coast. Available from: https://bcsalmonfarmers.ca/wp-content/uploads/2022/02/bcsfa_LicencesMatter_Report_Full_v4.pdf
In this report, the Coastal Communities for License Renewal summarize the earlier work done by the BC Salmon Farmers Association on the large and positive impact of fin fish farming on coastal communities, Indigenous nations and the overall BC economy. They deplore the negative impacts of the sudden announcement about removing licenses and suggest more respectful, participatory and carefully considered processes to deal with ongoing licensing issues.

Robinson Consulting and Associates Ltd. and Timberline Natural Resources Group Ltd. (2008). Kingcome Timber Supply Area TSR 3 Socio-Economic Assessment.
This report provides an overview of the Kingcome TSAs demographic and social characteristics, a description of its main communities and its primary economic drivers. It presents a survey of the forest industry active in the Kingcome TSA, recent trends, and the contribution of the TSA's timber supply to local and provincial economies. It also provides an analysis of the socio-economic implications of the base case timber supply forecast.

Roslyn Kunin and Associates in partnership with Human Capital Strategies. (2019). 2019 Prince Rupert Labour Market Study. Prepared for Redesign Rupert.
The study provides a projection of industry and occupation labour demand associated with major projects in and around Prince Rupert, and in-depth analysis of recruitment and retention issues that need to be addressed. The study also draws on lessons learned from communities in BC and other parts of Canada to provide recommendations on recruitment and retention strategies.

Roslyn Kunin and Associates in partnership with Human Capital Strategies. (2022). Potential Economic and Business Impacts of a new SFU Medical school in Surrey City Centre.

Although this study covered the impacts of an SFU medical school on the Surrey area, it did note the benefits of more BC trained doctors and increased health care which would be felt throughout the province. The decision has already been made to put in place this medical school, but it will be about ten years before the resulting new doctors are in practice

Rutley, B.D. (2005). Capacity Gap Assessment and Recommendations for Malcolm Island Communities & Cooperatives. Unpublished report to the Community Futures Development Corporation of Mt. Waddington. June 2005. 91pages.

This project sponsored by the Community Future Development Corporation of Mount Waddington (CFDC-MW) identified and partially addressed capacity gaps within the communities on Malcolm Island British Columbia. The list of tasks of the project included a community needs assessment around business strategies, co-op best practices and governance modeling; conducting extensive, strategic community outreach to contact important leaders in the community and develop a network for collaboration within the community; creation of an Action Plan from a community needs assessment; and providing assistance to local organizations long-term planning, funding applications, and mentor proposal writing skills.

Rutley, B.D. and R.D. Rutley (2006). North Island Post Secondary Education Needs Assessment. An unpublished report to the North Island Post Secondary Education Committee of the Regional District of Mount Waddington, Port McNeill BC

The purpose of the Needs Assessment is to create a comprehensive unbiased assessment of the current and future postsecondary education and training needs of the North Island. In addition an inventory of the credentials of current staff, of unfilled positions, and future needs is to be developed. While not part of the Needs Assessment report, a What's Next Planning workshop in order to facilitate decisions related to subsequent action, was a deliverable of the project.

Strategic Forest Management Inc. (2009). Coordinated Outdoor Recreation Resource Initiative. Regional District of Mount Waddington.

This initiative is intended to take an inventory of recreation features throughout the district and to compile the information into a planning document. The report describes the process of taking an inventory, writes up 20 outdoor recreation "shovel-ready" project designs to facilitate future planning and guide proposal writing. The report develops a plan to ensure that future outdoor recreation developments provide real benefits to communities.

Strathcona Regional District. (2017). Building Remote and Rural Community Capacity through High Speed Internet: Strathcona Regional District Broadband Study.

Improving connectivity throughout the region has been a strategic priority of the regional district board since 2014. This report is intended to uncover and promote awareness of the current state of broadband connectivity in the regional district, to identify gaps and opportunities and discuss the role of the regional district going forward not just in terms of advocacy, but also potentially

developing infrastructure and ensuring that communities are ready and able to take full advantage of future investments in this technology.

Technical Team. (2014). North Vancouver Island Marine Plan.

The purpose of the North Vancouver Island (NVI) Marine Plan (the Plan) is to provide spatial and nonspatial recommendations for achieving ecosystem-based marine management that maintains social and cultural wellbeing and economic development based on healthy ecosystems within the Plan Area over the long term. The Plan includes recommendations for developing and maintaining resilient marine ecosystems and sustainable economies for NVI communities. It focuses on providing direction for managing marine areas, uses and activities within provincial government jurisdiction.

Tourism BC. (2007). North Vancouver Island Tourism Plan.

The key issues and challenges for developing tourism in North Vancouver Island include: fixed roof accommodations, changing the visitor dynamic, access and infrastructure, organizational structure and allow awareness in the market place. This tourism plan for North Vancouver Island presents a vision and guiding principles for developing tourism in the region. It also contains specific strategies under destination management, product development, marketing and organizational structure that collectively work towards realizing the vision for tourism in North Vancouver Island.

Tourism BC. (2011). North Vancouver Island Tourism Plan Update Report.

Since the implementation of the regional tourism plan (Tourism BC 2007), Tourism BC facilitated a 'revisit' to Vancouver Island North to review progress and establish new priorities. This document represents a synthesis of the Workshop discussions and is supported by further secondary research. The report also outlines the strategic priorities for the following 24 to 36 months. The report concludes that the progress that has been made in implementing the 2007-08 Regional Tourism Plan has been significant. Undoubtedly the key factors to this success have been the adoption of the regional model and the commitment to working together in a more effective partnership. This commitment needs to be maintained with all partners continuing to work collectively to attract visitors.

Vancouver Island Economic Alliance. (2020). 2020 Edition State of the Island Economic Report. Prepared by MNP. Available here: www.viea.ca

This document looks at Vancouver Island as it emerges from the Covid 19 pandemic. After noting that in 2019, BC did better than much of the rest of Canada, it examines investment, the business environment and demographic factors and then goes into detailed analysis for many industries including aquaculture, forestry and tourism. The opportunities provided by seaweed production are described. The report concludes by discussing reconciliation and affordability.

Vancouver Island North. (Summer 2015). Visitor Profile.

Vann Struth Consulting Group. (2009). Regional Economic Analysis – Vancouver Island and Central/Sunshine Coasts.

This report provides a very detailed sectoral report on 18 sectors, going from agriculture to forestry to hi-tech and tourism for regional districts. Although composed a long while ago, it presents analysis using local quotient concepts.

Vann Struth Consulting Group. (2012). Ucluelet Economic Development Strategy. Prepared for District of Ucluelet.

Vann Struth Consulting Group in association with Algis Consulting Group. (2013). Draft Final Report: Sayward Economic Development Strategy. Prepared for Village of Sayward.

Vann Struth Consulting Group. (2018). Cormorant Island Marina Expansion Market Study. Tides of Change Cormorant Island Economic Development Committee

The report discusses the demand for moorage and estimates the economic impact.

Village of Port Alice. (2016). Port of Potential – Port Alice's Economic Development Strategy

Report prepared by municipality staff. Provided SWOT analysis and strategies.

Weir, D. & C. Pearce. (?). Revelstoke Community Forest Corporation: Community Venture Repatriates Benefits from Local Public Forests. Making Waves, Vol. 6, No. 4

A feature article in a journal(?)

Western Forest Products Inc. (2018). WFP Engelwood Forest Operation Sustainable Forest Management Plan.

A management review of the SFM requirements is completed annually as part of WFP's Environmental Management System Management Review process.

Western Forestry Contractors' Association (WFCA) and Qatalyst Research Group. (2022). Labour Market Strategy for The Silviculture Industry. Available here: https://wfca.ca/wp-content/uploads/2022/11/Silviculture-Labour-Market-Strategy-Report-January-13-2022.pdf.

This very current study looks at the special challenges faced by silviculture in obtaining and retaining a labour force. Silviculture is what puts sustainability into BC's important forest industry. Tree planting is the largest component. The sector has 228 employers and hired 10,000 people in 2020. Since the work is seasonal this provided 4,000 FTE's.

The report describes a strategy of four pillars: recruitment, workplaces, development and retention and education and training. For each pillar there are goals, actions and definitions of success. The required human resources and funds are noted in the implementation plan which would need $850,000 and take until the end of 2025 to put in place.

Wong, L., Stennes, B., & Bogdanski, B.E.C. (2019). Secondary manufacturing of solid wood products in British Columbia 2016: Structure, economic contribution and changes since 1990. Canadian Forest Service Pacific Forestry Centre Information Report BC-X-447. Available here: https://d1ied5g1xfgpx8.cloudfront.net/pdfs/39736.pdf.

The British Columbia forest industry continuously faces challenges from commodity market volatility, increased global competition, and declining timber supply. Such challenges were front and centre during the housing and financial crisis in the United States and subsequent great recession of 2007–2009. This report presents survey results for the province's secondary wood manufacturing industries in 2016. The survey gathered operational, employment, production, marketing, and financial information on business types, with supplemental information gathered for panelboard producers. Analysis of the survey results provides a comprehensive picture of the state of the sector's industries and allows for comparison with past surveys conducted by the Canadian Forest Service, including the last one undertaken in 2012. The industry has grown since the last survey, but the relative economic contribution of the two largest subsectors, remanufacturing and engineered wood products, remained largely unchanged. The changes occurred among the smaller subsectors, with strong growth in shakes and shingles and other wood products offsetting the decline in millwork.

Wyonch, R., & Seward, B. (2023). From Class to Career: How Work Integrated Learning Benefits Graduates Looking for Jobs. [Commentary 642]. Toronto: C.D. Howe Institute. https://www.cdhowe.org/public-policy-research/class-career-how-work-integrated-learning-benefits-graduates-looking-jobs

This very recent document looks at work integrated learning (WIL) for post-secondary students. WIL consists of co-op programs, work term placements and work experience programs where students get a chance to actually experience life on the job. The results for students vary by educational level (college or university), type of WIL (co-op or other) gender and the programs the students are in, but they are all positive. In their careers, WIL students find better jobs, are less likely to be considered overqualified for those jobs, are more likely to be working in their chosen fields and end up making more money.

The study does not look at potential benefits for employers, but it is obvious that taking a WIL student in any capacity increases the odds of that person continuing to work with that employer and filling vacancies in the community. Educational institutions that may have been reluctant to work with employers can ensure that their students benefit from the positive results of this research by starting or enhancing WIL. Governments are encouraged to offer support for WIL through their policies.

Food and Agriculture Organization of the United Nations, Fisheries and aquaculture statistics page. https://www.fao.org/fishery/en/statistics.

For maps of Vancouver Island / Coast Development Region along with the regional districts, see: https://www2.gov.bc.ca/gov/content/data/geographic-data-services/land-use/administrative-boundaries/census-boundarie