

# BUSINESS SURVEY SUMMARY REPORT

## TARGETED OFFICIAL COMMUNITY PLAN REVIEW

January 2021



## Summary

From December 3<sup>rd</sup> to 13<sup>th</sup>, 2020, a survey regarding the Targeted Official Community Plan (OCP) Review was made available online on the District of North Vancouver's website. The purpose of the survey was to gather input from businesses in the District on the key issues and potential actions that have been identified through the Targeted OCP Review process for the *Economy & Employment Lands* topic. Specifically, the survey was intended to help staff understand if what we had heard so far resonated with the broader business community, including small businesses, and identify any possible gaps.

Notice of the online survey and a request to participate was sent out via email to all business licence holders in the District with email addresses on file. In total, the survey was sent to 3,101 recipients representing approximately 96% of business licence holders. In total, 180 responses were received (5.8% response rate).

Overall, responses generally aligned with what we have heard through prior stakeholder engagement: responses indicated that the key issues resonated with participants, who were also supportive of the potential actions. Responses were also generally consistent between small and large businesses with only minor differences.

**Key issues** perceived as being most important include:

- Province's "highest and best use" approach to property assessment and taxation (84%) which has resulted in major tax increases and is significantly affecting small businesses, and
- housing and transportation challenges make it difficult for employers to attract and retain workers (78%).

**Potential actions** perceived as most important are:

- supporting implementation of North Shore transportation plans to improve mobility (89%), and
- streamline development and building permitting processes in the District (82%).

Survey respondents were also asked to indicate if they were interested in an additional conversation with District staff to further inform the Targeted OCP Review process and discuss survey responses. Small group conversations were held virtually on January 6 and 7, 2021. In total, representatives from 12 businesses participated in the virtual conversations. In these conversations, participants shared their experiences—which closely aligned with those of the survey results, regardless of business size and sector. Conversations focused on the significant impact transportation and housing issues are having on businesses of all sizes and sectors, and the need to prioritize actions that will improve goods and people movement while also providing housing options that will support a local workforce.

The results of the survey and follow-up conversations will be used to inform the development of the draft Action Plan, anticipated for completion in late summer/early fall 2021.

**For more information about the Targeted OCP Review process, please visit:**

[DNV.org/community-environment/official-community-plan-targeted-review](https://dnv.org/community-environment/official-community-plan-targeted-review)



## Profile of Respondents

The majority of respondents were:

- from businesses with fewer than 10 employees (69%)
- in business for more than 10 years (63%)
- the owner, president or CEO (91%)
- from locations across the District and a diversity of business sectors

<b>Business Size (Employees)</b>	<b>Percent</b>
<i>None</i>	16%
<i>&lt;10</i>	53%
<i>10-49</i>	27%
<i>50-99</i>	2%
<i>100-249</i>	1%
<i>250+</i>	1%

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<b>Business Duration (Years in Business)</b>	
<i>&lt;1</i>	4%
<i>1-5</i>	19%
<i>6-10</i>	14%
<i>10+</i>	63%

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<b>Business Location</b>	
<i>Blue Ridge / Seymour</i>	16%
<i>Deep Cove</i>	5%
<i>Delbrook / Upper Lonsdale</i>	10%
<i>Edgemont</i>	8%
<i>Lions Gate</i>	3%
<i>Lynn Creek / Main Street</i>	10%
<i>Lynn Valley</i>	21%
<i>Marine Drive</i>	9%
<i>Norgate / Lower Capilano</i>	14%
<i>Upper Capilano</i>	4%

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<b>Respondent Role</b>	
<i>Owner</i>	66%
<i>President/CEO</i>	25%
<i>Vice President</i>	2%
<i>General or Dept. Manager</i>	5%
<i>Supervisor</i>	2%
<i>Employee</i>	1%
<i>Other</i>	1%

<b>Business Sector</b>	
<i>Accommodation</i>	2%
<i>Advertising &amp; media / communications</i>	3%
<i>Arts &amp; culture</i>	2%
<i>Automotive &amp; marine</i>	4%
<i>Business &amp; professional services</i>	14%
<i>Computers &amp; telecommunications</i>	4%
<i>Family, community &amp; not-for-profit</i>	3%
<i>Finance &amp; insurance</i>	2%
<i>Government / education</i>	1%
<i>Health care</i>	9%
<i>Home &amp; garden</i>	1%
<i>Industrial supplies &amp; services</i>	1%
<i>Legal</i>	1%
<i>Manufacturing, production &amp; wholesale</i>	10%
<i>Personal services &amp; care</i>	4%
<i>Pets &amp; veterinary</i>	1%
<i>Public utilities &amp; environment</i>	1%
<i>Real estate, development &amp; moving</i>	2%
<i>Recreation, entertainment</i>	2%
<i>Restaurants, food, beverage</i>	4%
<i>Shopping, speciality retail</i>	7%
<i>Sports, recreation</i>	1%
<i>Tourism services</i>	1%
<i>Transportation</i>	0%

## Results

The survey included four questions to understand perceived importance of key issues and potential actions, and to allow opportunity for respondents to note any potential gaps.

The following section provides an overview of the results received for the four questions, followed by a summary of the key themes that emerged during the subsequent small group discussions.

**Q1:** *The following is a list of issues that were identified in the February 2020 stakeholder workshop on the Economy & Employment Lands. Please rate the importance of these issues to you.*

Results are shown first for all responses, then according to business size (number of employees) to understand if there are differences between smaller and larger businesses.

### The results show:

- Overall strong agreement that the key issues identified through the Targeted OCP Review process are important to the economy and employment lands;
- Provincial approach to property assessments is perceived as the most important issue, followed closely by housing and transportation issues making it challenging to attract and retain workers; and,
- Perceived importance of potential actions relatively consistent for both small and larger businesses, with both groups selecting the following issues as most important:
  - *Highest and best use approach to property assessment and taxation;*
  - *Employers are struggling to attract and retain workers due to housing and transportation issues; and,*
  - *A lack of jobs in the District is forcing many residents to commute out of the District.*
- Only minor variances were noted between small and larger businesses, notably:
  - Larger businesses were more likely to select any of the six key issues as “*very important*”, which may suggest a relationship between scale of operation and perceived impact these issues may have as a result.

**Results (all responses):**

Issue Description	Very important	Important	Neutral	Not important	Not at all important	I don't know
"Highest and best use" approach to property assessment and taxation has resulted in major tax increases and is significantly affecting small businesses	69%	15%	6%	2%	2%	7%
Employers are struggling to attract and retain workers due to housing and transportation issues	58%	20%	7%	7%	7%	2%
A lack of jobs in the District is forcing many residents to commute out of the District	39%	28%	15%	7%	4%	8%
There are limited opportunities for business growth within the existing employment land	31%	26%	23%	5%	5%	9%
Industrial land supplies are shrinking due to redevelopment and encroachment by non-industrial uses	31%	26%	19%	9%	5%	9%
There are potential conflicts between different employment uses when they are not locating in preferred locations (i.e., commercial uses on industrial land)	21%	30%	25%	6%	3%	15%

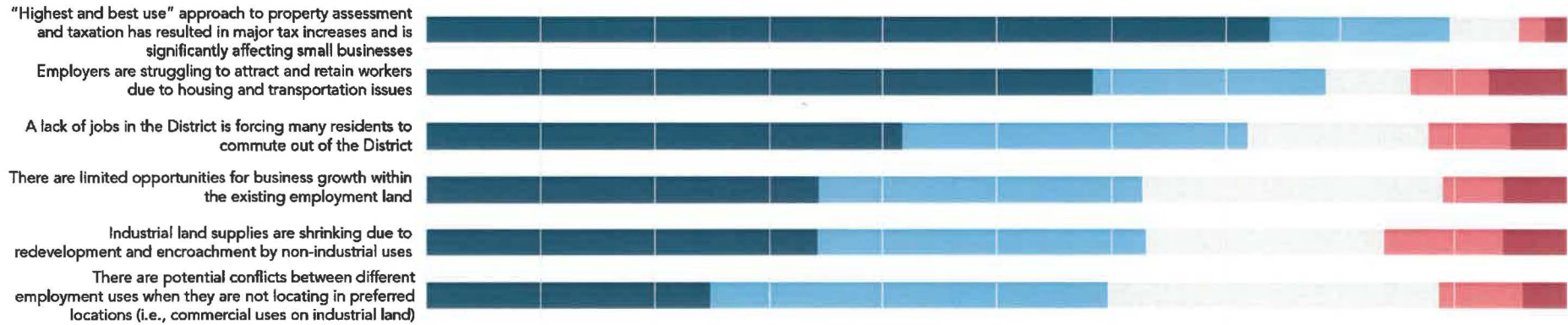
**Results (by business size):**

Issue Description	Business size (employees)	Very important	Important	Neutral	Not important	Not at all important	I don't know
"Highest and best use" approach to property assessment and taxation has resulted in major tax increases and is significantly affecting small businesses	<10	68%	14%	4%	3%	3%	8%
	10+	74%	16%	8%	2%	0%	7%
Employers are struggling to attract and retain workers due to housing and transportation issues	<10	54%	22%	9%	4%	10%	2%
	10+	66%	17%	5%	11%	2%	2%
A lack of jobs in the District is forcing many residents to commute out of the District	<10	39%	29%	13%	4%	7%	9%
	10+	41%	28%	18%	13%	0%	7%
There are limited opportunities for business growth within the existing employment land	<10	27%	26%	23%	6%	5%	12%
	10+	40%	26%	26%	3%	5%	5%
Industrial land supplies are shrinking due to redevelopment and encroachment by non-industrial uses	<10	32%	26%	19%	9%	6%	8%
	10+	34%	29%	21%	12%	3%	12%
There are potential conflicts between different employment uses when they are not locating in preferred locations (i.e., commercial uses on industrial land)	<10	21%	34%	22%	4%	4%	15%
	10+	25%	25%	35%	13%	2%	18%

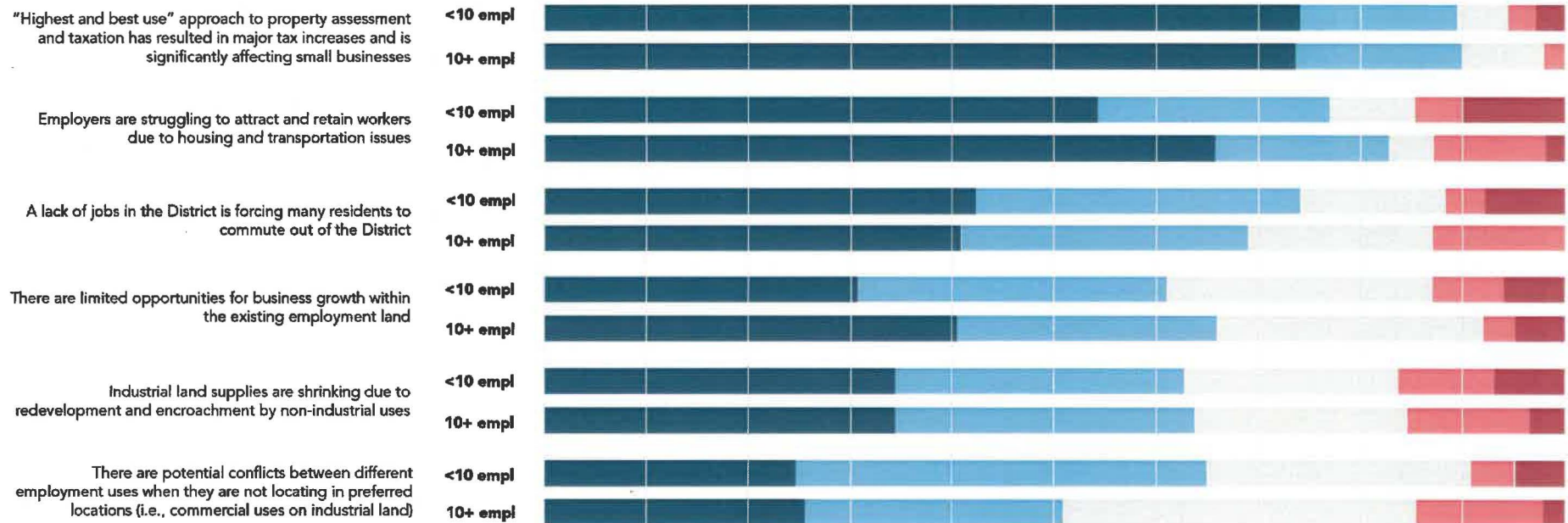


## KEY ISSUES AGGREGATE (ALL RESPONSES)

Very Important   Important   Neutral   Not Important   Not Important at all



## COMPARISON BY BUSINESS SIZE



Note: Percentages in charts adjusted to account for removal of "I don't know" responses.

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**Q2:** *Are we missing any key issues that you feel are important?*

**A total of 50 comments were received. The following issues were most frequently referenced:**

- **Parking:** Availability of parking was identified as a significant issue, both for customers accessing businesses as well as employees trying to access places of work.
- **Transportation:** Congestion was cited as a concern, due to its impact on attracting employees to work in the District as well as its implications for operating a business that requires transportation throughout the North Shore.
- **Taxation:** Impact of the highest and best use approach to property assessment is having on the financial viability of small businesses. The highest and best use approach assesses land value based on the reasonable and optimal legal use of property which is both physically possible and financially feasible, rather than the current use of the property.
- **Infrastructure:** Provision and upkeep of infrastructure to service businesses and a growing population were cited as a key issue.
- **COVID-19 pandemic:** Impact of the COVID-19 pandemic on business operations and consumer behaviour.
- **Cost & supply of space:** Lack of available and affordable property for commercial and industrial operations, and challenges with permitting to expand or alter existing spaces.
- **Housing & Transportation for Employees:** Limited labour force due to challenges associated with housing and transportation.

**Q3:** *The following is a list of potential actions identified in the February 2020 stakeholder workshop on the Economy & Employment Lands. Please rate the importance of each of the following possible actions the District could take within its jurisdiction.*

Results are shown first for all business sizes, then by fewer than 10 employees and 10+ employees to understand if issues differ by business size.

**The results show:**

- Overall strong agreement that the potential actions identified through the Targeted OCP Review process are important to the economy and employment lands;
- Alignment with the conclusions of the stakeholder workshops, which suggested the following potential actions as particularly important:
  - Support implementation of North Shore transportation plans;
  - Streamline permitting processes;
  - Advocate for Provincial assessment review and tax reform; and,
  - Incentivize employment-generating development.
- Perceived importance of potential actions relatively consistent for both small and large businesses, with only minor variances such as:
  - Larger businesses more frequently selected “streamline permitting processes” and “incentive employment-generating development” as very important actions; and,
  - Smaller businesses more frequently selected “advocate for provincial assessment review and tax reform” and “encourage local-serving businesses” as very important actions the District could take.

**Results (aggregate):**

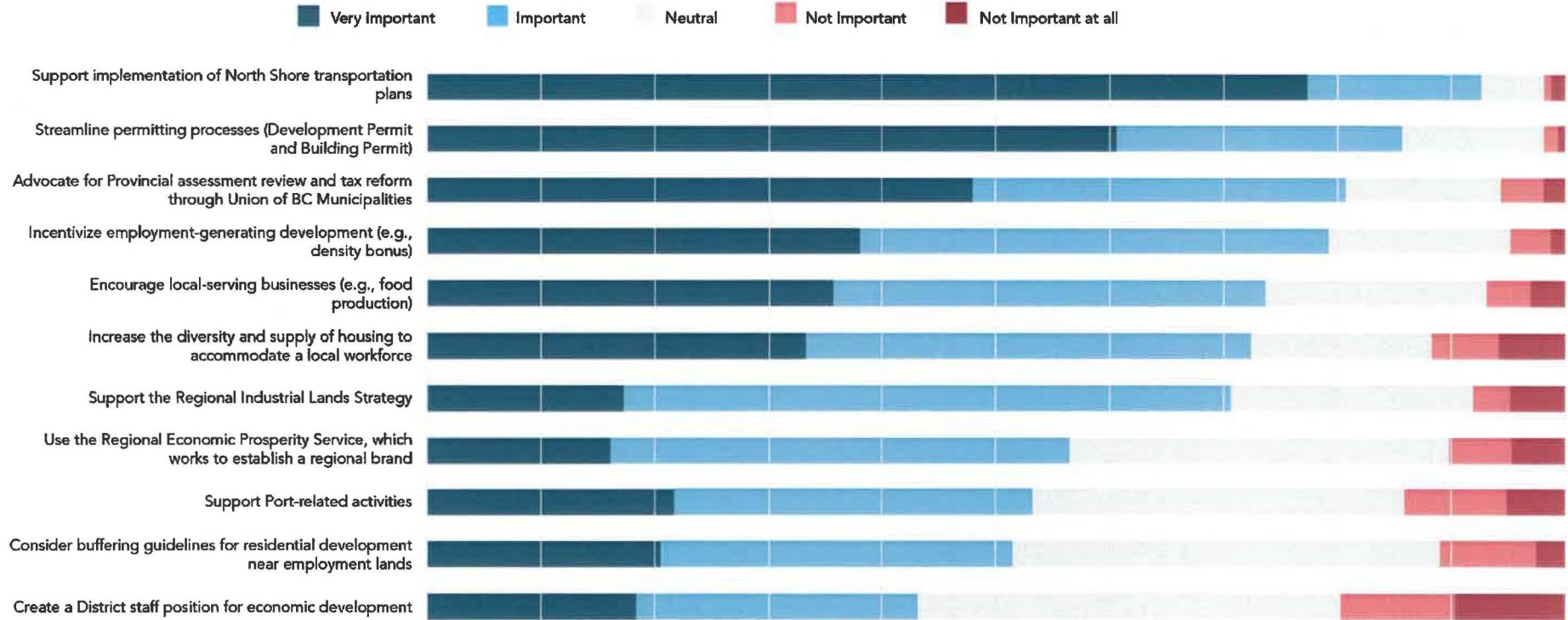
Issue Description	Very important	Important	Neutral	Not important	Not at all important	I don't know
Support implementation of North Shore transportation plans	74%	15%	5%	1%	1%	5%
Streamline permitting processes (Development Permit and Building Permit)	58%	24%	12%	1%	1%	5%
Advocate for Provincial assessment review and tax reform through Union of BC Municipalities	45%	31%	13%	3%	2%	6%
Incentivize employment-generating development (e.g., density bonus)	37%	40%	15%	4%	1%	4%
Encourage local-serving businesses (e.g., food production)	35%	37%	19%	4%	3%	2%
Increase the diversity and supply of housing to accommodate a local workforce	33%	39%	16%	6%	6%	1%
Support the Regional Industrial Lands Strategy	15%	45%	18%	3%	4%	16%
Use the Regional Economic Prosperity Service, which works to establish a regional brand	14%	35%	28%	5%	4%	14%
Support Port-related activities	20%	29%	30%	8%	5%	9%
Consider buffering guidelines for residential development near employment lands	19%	28%	34%	8%	2%	10%
Create a District staff position for economic development	17%	23%	34%	9%	9%	9%



**Results (by business size):**

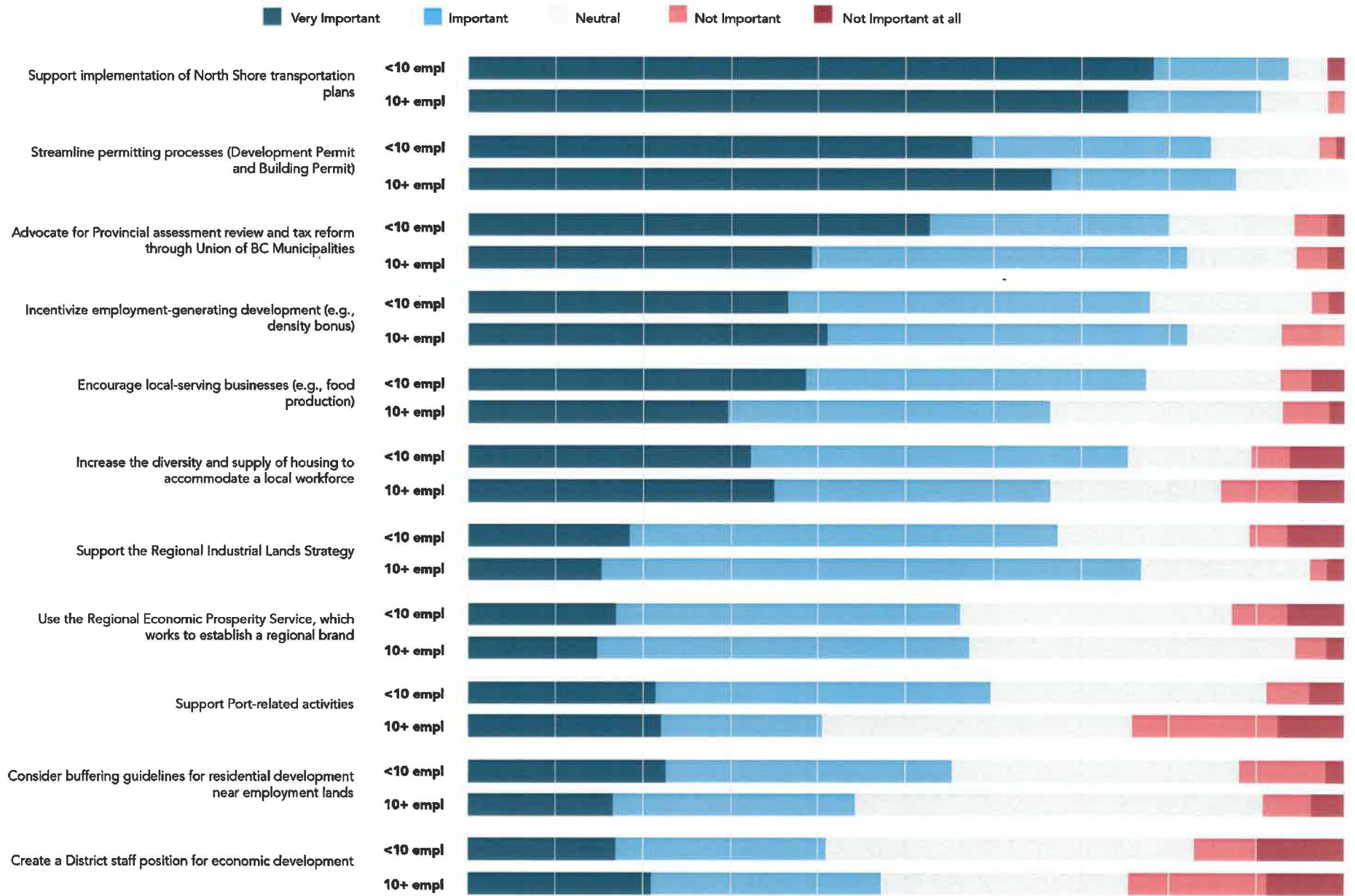
Issue Description	Business size (employees)	Very important	Important	Neutral	Not important	Not at all important	I don't know
Support implementation of North Shore transportation plans	<10	76%	15%	4%	0%	2%	3%
	10+	75%	15%	8%	2%	0%	9%
Streamline permitting processes (Development Permit and Building Permit)	<10	54%	26%	12%	2%	1%	6%
	10+	67%	21%	12%	0%	0%	2%
Advocate for Provincial assessment review and tax reform through Union of BC Municipalities	<10	49%	25%	13%	4%	2%	7%
	10+	39%	43%	13%	4%	2%	4%
Incentivize employment-generating development (e.g., density bonus)	<10	35%	39%	18%	2%	2%	4%
	10+	41%	41%	11%	7%	0%	2%
Encourage local-serving businesses (e.g., food production)	<10	38%	38%	15%	4%	4%	3%
	10+	30%	37%	26%	5%	2%	2%
Increase the diversity and supply of housing to accommodate a local workforce	<10	32%	43%	14%	4%	6%	0%
	10+	35%	32%	19%	9%	5%	2%
Support the Regional Industrial Lands Strategy	<10	15%	40%	18%	4%	5%	19%
	10+	15%	62%	19%	2%	2%	12%
Use the Regional Economic Prosperity Service, which works to establish a regional brand	<10	14%	32%	25%	5%	5%	18%
	10+	15%	43%	37%	4%	2%	7%
Support Port-related activities	<10	19%	35%	28%	4%	4%	10%
	10+	22%	19%	35%	17%	7%	7%
Consider buffering guidelines for residential development near employment lands	<10	20%	29%	29%	9%	2%	11%
	10+	17%	28%	46%	6%	4%	9%
Create a District staff position for economic development	<10	15%	21%	37%	6%	9%	12%
	10+	21%	26%	28%	16%	9%	2%

## POTENTIAL ACTIONS AGGREGATE (ALL RESPONSES)



Note: Percentages in charts adjusted to account for removal of "I don't know" responses.

POTENTIAL ACTIONS  
COMPARISON BY BUSINESS SIZE



Note: Percentages in charts adjusted to account for removal of "I don't know" responses.

**Q4:** *Are we missing any possible actions within the District's jurisdiction as a municipality that you feel should be considered?*

**A total of 25 comments were received. The following actions were most frequently referenced:**

- **Transportation:** Need to reduce congestion and improve accessibility via an expansion of public transportation infrastructure, expanded traffic monitoring and modelling, and expanded transportation infrastructure (e.g., roads, additional crossing to the North Shore, etc.)
- **Housing:** Support development and increase housing supply to accommodate the local workforce was mentioned; however, other respondents raised concerns about the impacts this is having on infrastructure.
- **Permits:** Simplify and expedite permitting processes, both for new development as well as alterations and improvements.

### Small Group Discussions

Survey respondents had the option to indicate interest in an additional conversation with District staff to further inform the Targeted OCP Review process and discuss survey responses. Two group discussions were held on January 6 and 7, 2021, with 12 participants representing businesses in the following sectors:

- Real estate, development & moving
- Government & education
- Shopping & speciality retail
- Restaurants, food & beverage
- Construction & contractors
- Accommodation
- Sports & recreation

These discussions provided space for participants to further discuss the key issues and potential actions, and provide additional insight to inform the Targeted OCP Review process.

#### Key themes that arose during the discussions (in no particular order):

- **Transportation:** Participants reiterated the need to reduce congestion, citing actions ranging from improving public transit options and coordinating construction and road work. Participants noted that transportation challenges were causing a range of implications, including: difficulty attracting and retaining employees that commute from outside the District; delays with the movement of goods and services leading to increased costs; and requests from employees to alter work arrangements or hours to avoid congestion during their commute.
- **COVID-19 pandemic:** Participants felt that although the COVID-19 pandemic has helped alleviate some of the transportation challenges, it has caused new operational difficulties for many businesses on the North Shore that are unable to accommodate remote work due to the goods or services they provide.
- **Space:** Participants shared the challenges they have faced with trying to find available, affordable, or appropriate property for their commercial operations. Further, participants felt that it is challenging to obtain permission and necessary permits to create new space or alter existing spaces.



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