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LAND USE DEMAND STUDY

FINAL REPORT

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312 - 645 Fort Street, Victoria, BC V8W 1G2 | T : 250.864.1025

CONTACT: Shaun Heffernan
E: sheffernan@urbansystems.ca

PREPARED FOR:

The District of Ucluelet and the District of Tofino

DISTRICT OF UCLUELET

DISTRICT OF TOFINO

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Alberni-Clayoquot Regional District

CONTENTS

APPENDICES

1.0 INTRODUCTION

The West Coast Land Use Demand Study, begun in the spring of 2020, is envisioned as a strategic analysis of current land use, vacant or underdeveloped land supply, and future growth and land demand. It is a collaborative undertaking between the local, regional, and First Nations governments on the West Coast of Vancouver Island (see **Figure 1**). Participating agencies include the Districts of Ucluelet and Tofino, Alberni-Clayoquot Regional District (ACRD), Ahousaht First Nation, Toquaht First Nation, Tla-o-qui-aht First Nation, Yuułu?iɬ?atḥ (Ucluelet First Nation), Hesquiaht First Nation, and Pacific Rim National Park Reserve. This project was initiated because these communities face similar issues and pressures around economic development and land use. Their participation in this study is intended to generate greater understanding of the extent of these issues in the West Coast Region as a whole.

The Land Use Demand Study includes a thorough analysis of land use demand and growth in the Districts of Ucluelet and Tofino, and possible implications of growth on infrastructure and servicing, with the goal of supporting strategic decision-making and long-range planning for land development and infrastructure in the region. This is an important opportunity to translate local and regional land use information into a complementary vision between the two Districts.

Collaboration between the Districts, local First Nations, the ACRD, and Parks Canada ensures that the growth and land use mix estimates that are developed as part of this project are accurate and current, providing regional partners with the best available tools to inform long-term strategic planning, infrastructure investments, and financing to create predictive policies. The Land Use Demand Study analyzes the region as a whole and extend to future development anticipated on the treaty lands of neighbouring First Nations lands, including Tla-o-qui-aht, Yuułu?iɬ?atḥ (Ucluelet), Hesquiaht, and Toquaht Nations, with consideration for any major initiatives occurring within their traditional territory (Hahoulthee).

There is growing recognition of Vancouver Island's west coast with its diverse landscapes, growing economies, and vibrant communities as renowned destination that combines unique cultures with stunning locations. However, there is an appreciation from members of all communities in the region that rapid growth in the tourism sector must be balanced with diverse economic opportunities and well-delivered services for residents. Therefore, the Land Use Demand Study and Industrial & Commercial Lands Strategy are focused on understanding the West Coast Region's existing land use and on analyzing the economic conditions, drivers and opportunities that need to be considered to inform local decisions on desired and sustainable development trajectories in the region.

1.1 COMMUNITY PARTNERS

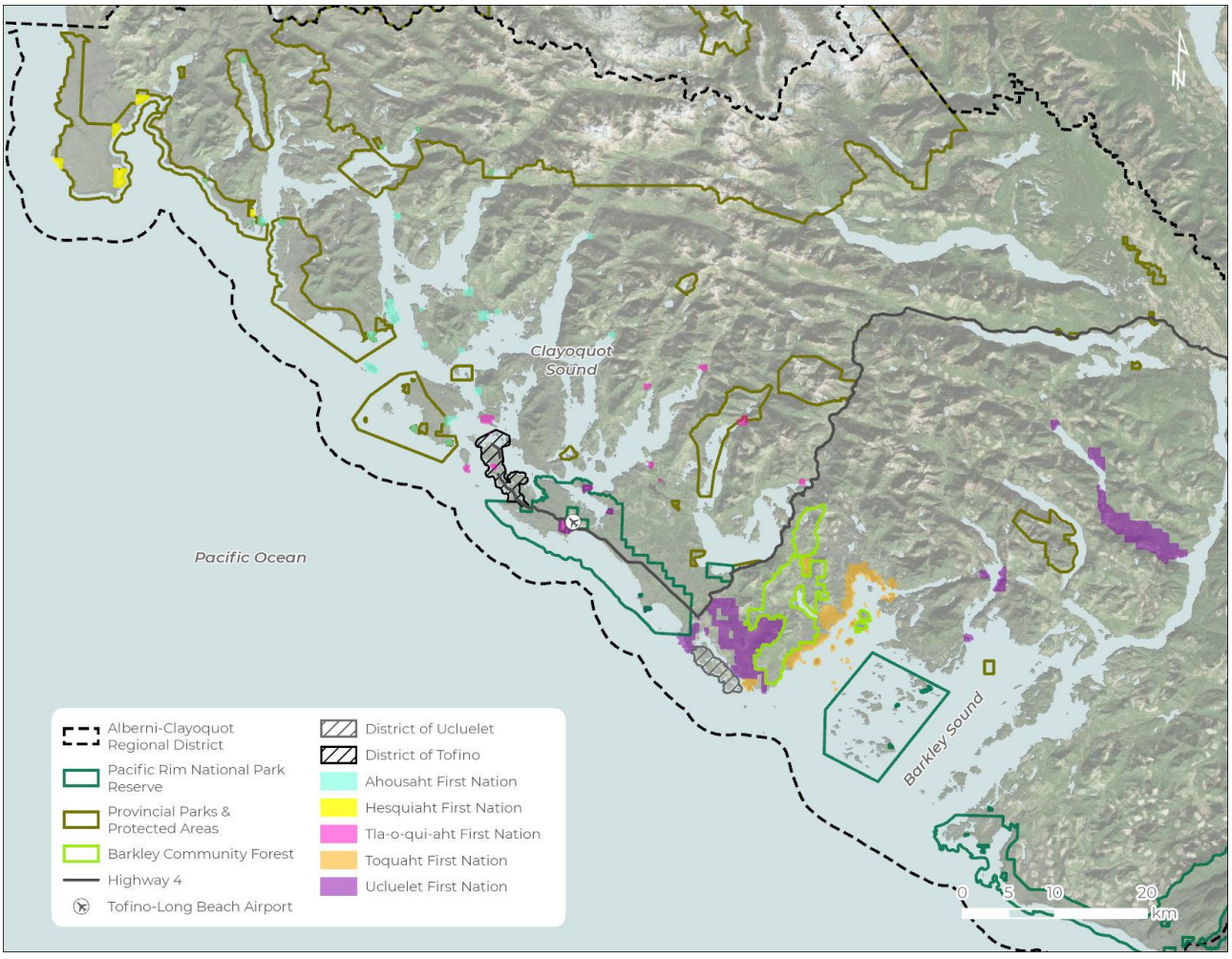
This Land Use Demand Study examines is a collaborative undertaking between the local, regional, and First Nations governments of the West Coast Region, shown in **Figure 1**. The region's communities all face similar issues and pressures in regard to economic development and land use, and broader participation provides greater understanding of the extent of these issues. The following section provides an overview of the participating communities and agencies, including a summary of demographic trends and economic activities.

Participating communities and agencies include:

- District of Tofino
- Alberni-Clayoquot Regional District
- Tla-o-qui-aht First Nation
- Yuułu?ił?atḥ (Ucluelet First Nation)
- Pacific Rim National Park Reserve (Long Beach Unit)
- District of Ucluelet
- Ahousaht First Nation
- Toquaht First Nation
- Hesquiaht First Nation

Since 2000, these communities are included in the Clayoquot Biosphere Region, one of 18 UNESCO biosphere reserves in Canada. The biosphere designation confirms the commitment of local communities, including all those participating in the Land Use Demand Study, to find a "sustainable balance between conserving cultural diversity natural ecosystems and biodiversity, and fostering sound economic development." The formation of the biosphere region depended on the commitment of community members to ensuring sustainable livelihoods and continued protection of the region's natural environments, principles which are central to the Land Use Demand Study.

Figure 1: West Coast Region Study Area



1.1.1 DISTRICT OF TOFINO

The District of Tofino is located in Clayoquot Sound, north of Ucluelet and Pacific Rim National Park Reserve on the traditional territory of Tla-o-qui-aht First Nation. As of 2019, Tofino's year-round population is 2,434, and has grown 26% since the previous Census year in 2016[1]. During the summer, Tofino's population is significantly higher typically drawing a younger demographic to employment opportunities in the tourism industry. The median age in Tofino is 36 years, well below the provincial and Vancouver Island median. Primarily accessed on Highway 4 from Port Alberni, Tofino is among the westernmost municipalities on Vancouver Island and British Columbia. The community is accessible by air from the Tofino-Long Beach Airport or float plane from Vancouver Harbour.

Tofino has undergone a broad economic transition from an extractive, resource-based economy to a tourism-focused economy. The District's unique marine ecosystems, surrounding mountains and temperate rainforest have made Tofino one of Canada's premier destinations, attracting visitors from around the world. The *Economic Impact of Tourism in Tofino BC* report estimated that 600,000 visitors experienced Tofino in 2018. During peak season occurring from May to September approximately 358,000 people visited Tofino, with August being the busiest month with 66,300 visitors. Overall, this means that there were approximately 300 visitors per resident in Tofino in the summer.

Today, accommodation and food services account for 30.2% of Tofino's total workforce, nearly four times the provincial average. It is estimated that tourism-related employment in Tofino created 2,670 jobs in 2018. Other significant industries include retail trade, fish processing, construction, transportation and warehousing, health care and social assistance, and administration, support, and waste management services[2]. However, many of these industries are connected to the tourism industry.

Municipal planning initiatives are aiming to diversify the local economy, while strengthening sustainable and resilient tourism in Tofino. For example, the *Tourism Master Plan* acknowledges the importance of developing community infrastructure and expanding attainable housing, while also ensuring that environmental considerations are integrated into tourism experiences and development. Implementing and updating the *Tourism Master Plan* is the key strategic priority for the economy in the *2019-2022 Strategic Plan* for Tofino.

1.1.2 DISTRICT OF UCLUELET

The District of Ucluelet is located on the Ucluth peninsula, south of Tofino and Pacific National Park Reserve on the traditional territory of the Yuułu?ił?atḥ. In 2019 the population of Ucluelet was 1,842, 7.3% greater than the previous Census year. Ucluelet's median age of 39.2 years means the population is relatively young when compared to the province and Vancouver Island, but has also seen dramatic growth in older population groups. Like Tofino, access to the community is largely restricted to Highway 4, with flights available to Vancouver from Long Beach Airport and seasonal ferry service to Port Alberni on the Lady Rose Marine Service.

Similar to other communities in the West Coast Region, economic activity in the District of Ucluelet is largely centered around tourism and marine industries[3]. Having transitioned from a primarily resource-

[1] Government of British Columbia, Population Estimates https://www2.gov.bc.ca/gov/content/data/statistics/people-population-community/population/population-estimates
[2] District of Tofino Community Profile. Retrieved from https://static1.squarespace.com/static/55ae982de4b0d41522afbc4b/t/5bce52898165f57234c3940c/1540248209036/Tofino+Community+Profile+2018.pdf
[3] District of Ucluelet Community Profile (2019). Retrieved from https://ucluelet.ca/development/community-profile

based economy, the community's draft *Official Community Plan* describes fishing and tourism as the "twin pillars" of Ucluelet's economy[4]. Based on the 2016 Census, 44% of jobs in Ucluelet were in tourism-related sectors and a further 18% were in fishing, aquaculture, and seafood processing. Unique character and local recreational opportunities, along with the community's gateway location to regional recreational opportunities, like the Broken Group Islands and Pacific Rim National Park, have made Ucluelet an increasingly popular tourist destination.

Partly as a result of the limitations on population and tourism accommodation in Tofino, Ucluelet is likely to experience growth in the District's population and tourism sector over the coming years. The District's draft *Official Community Plan* recognizes the need to respond to this pressure, making responsible decisions for the needs of community residents and visitors. Among the most important economic development strategies identified in the community's *Economic Development Strategy*, continuing to strengthen working relationships with local First Nations, adjacent communities, and community organizations was essential. The Land Use Demand Study will support these strategies and ensure ongoing communication and understanding between these partners[5].

1.1.3 ALBERNI CLAYOQUOT REGIONAL DISTRICT

The Alberni-Clayoquot Regional District encompasses the majority of the West Coast Region, extending from Port Alberni, around Clayoquot and Barkley Sounds. Electoral Area C is the Regional District's largest electoral area, encompassing the area north of Barkley Sound to Hesquiat Harbour and east of Sproat Lake in the traditional territories of the Nuu-chah-nulth Tribal Council, including Tla-o-qui-aht, Toquaht, and Yuułu?ił?atḥ First Nations. Crucially, the ACRD operates the Tofino-Long Beach Airport (YAZ), the West Coast Region's only airport.

The *South Long Beach Official Community Plan* was completed in 2007 and provides direction for the areas of Electoral Area C located to the west of Pacific Rim National Park Reserve, north of the District of Ucluelet and Barkley Sound. The area has approximately 1,592 permanent residents as of the 2016 Census with the population growing during the summertime due to a high number of seasonal dwellings, particularly near Salmon Beach[6]. Traditionally, South Long Beach has relied on resource-based industries for economic opportunities, particularly forestry, with employment opportunities now also drawing to Tofino or Ucluelet. According to the community's OCP, only a small portion of land in the South Long Beach area is privately held. The limited number of residential properties was resulting in rapidly growing land values[7].

1.1.4 AHOUSAHT FIRST NATION

Ahousaht First Nation is a Nuu-chah-nulth First Nation and the largest Nation in the Nuu-chah-nulth Tribal Council, with 2,400 members across Vancouver Island, 736 of whom live in the Nation's primary community of Maaqutusiis on southern Flores Islands. The Nation presides over approximately 1396 acres of reserve land throughout the traditional territory[8].

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[4] District of Ucluelet Official Community Plan (2019). Retrieved from https://ucluelet.ca/images/OCP_2018_draft_for_consultation.pdf
[5] Ucluelet Economic Development Strategy (2012). Retrieved from https://ucluelet.ca/phocadownload/community-planning/ucluelet%20economic%20development%20strategy%20-%20final%20report%202012-04%201.pdf
[6] Alberni Clayoquot Regional District Population Statistics. Retrieved from https://www.acrd.bc.ca/population-stats
[7] South Long Beach Official Community Plan (2007). Retrieved from https://www.acrd.bc.ca/cms/wpattachments/wpID125atID559.pdf
[8] BC Assembly of First Nations – Ahousaht First Nation. Retrieved from https://www.bcafn.ca/first-nations-bc/vancouver-island-coast/ahousaht

Major economic sectors for Ahousaht First Nation are akin those in surrounding communities with tourism, finfish aquaculture, forestry, and fishing representing the Nation's primary employment generators. Ahousaht administration operates community-owned ventures through the Maaqutusiis Hahoulthee Stewardship Society and the Ahousaht Business Corporation, including a campground, water taxi service, and forestry company[9].

1.1.5 TLA-O-QUI-AHT FIRST NATION

Tla-o-qui-aht First Nation is a Nuu-chah-nulth First Nation with 1,166 members, approximately 387 of whom live on-reserve. The Nation currently presides over 12 reserves, accounting for approximately 865 acres of land within Tla-o-qui-aht traditional territory near Tofino and throughout Clayoquot Sound[10]. There are three primary population centres on Tla-o-qui-aht lands: Opitsaht on Meares Island, Tin Wis within Tofino, Ty-Histanis and Esowista near Long Beach surrounded by Pacific Rim National Park Reserve.

Tla-o-qui-aht is heavily involved in economic development around Clayoquot Sound with numerous investments made in expanding the Nation's presence in local tourism, renewable energy, and seafood industries. The nation is partnered with Best Western to operate Best Western Tin Wis, a beachfront resort near Tofino, operates run-of-river hydroelectric projects at Canoe Creek and Haa-ak-Suuk Creek while also having started TFN Seafoods, a commercial fishery operation[11].

1.1.6 TOQUAHT FIRST NATION

Toquaht First Nation is a self-governing, modern treaty nation and among the smallest nations in the Nuu-chah-nulth Tribal Council. Governed under the Maa-nulth Treaty, Toquaht has full jurisdiction of over 3,847 acres of land primarily along the northwestern edge of Barkley Sound[12]. There are currently 156 Toquaht members, most members currently live off Nation land in other parts of Vancouver Island[13]. Members residing on Toquaht lands primarily reside in the Nation's principal community at Macoah.

Economic development has been a primary focus of Toquaht Nation in recent years, with the Nation initiating several new projects. Enterprises under the Nation's include a campground and kayak launch, shellfish harvesting, forestry and milling operations, salmon aquaculture, run-of-river hydro, and asset management corporation[14].

1.1.7 YUUŁU?IŁ?ATḤ (UCLUELET FIRST NATION)

The Yuułu?ił?atḥ Government is a self-governed, modern treaty nation of the Nuu-chal-nuth and Maa-nulth Treaty. The Nation's traditional territory is primarily located around Ucluelet and Barkley Sound, and under the Maa-nulth Treaty the Yuułu?ił?atḥ Government presides over 2,905 ha of land in this area. The Nation has approximately 675 members, with 204 living on Nation lands centered around the community of hitacu across Ucluelet Harbour from the District of Ucluelet.

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[9] Maaqutusiis Hahoulthee Stewardship Society. Retrieved from http://www.mhssahousaht.ca/mhss
[10] Tla-o-qui-aht First Nation Profile. Retrieved from https://fnp-ppn.aadnc-aandc.gc.ca/FNP/Main/Search/FNMain.aspx?BAND_NUMBER=660&lang=eng
[11] Tla-o-qui-aht First Nation website. Retrieved from https://www.tla-o-qui-aht.org/
[12] Toquaht First Nation Official Community Plan. Retrieved from http://www.toquaht.ca/wp-content/uploads/2016/02/TNS_1-2016_Official-Community-Plan-Act-00685616-1-with-schedule.pdf
[13] Toquaht First Nation Profile – Registered Population. Retrieved from https://fnp-ppn.aadnc-aandc.gc.ca/fnp/Main/Search/FNRegPopulation.aspx?BAND_NUMBER=666&lang=eng
[14] Toquaht First Nation Operating Companies. Retrieved from http://www.toquaht.ca/operating-companies/

Economic development on Yuułu?ił?ath lands is headed by several Nation-led corporations, where significant investments made into key sectors particularly tourism and accommodation. Current holdings include a resort and campground, several retail storefronts, a restaurant, and motel.

1.1.8 HESQUIAHT FIRST NATION

Hesquiaht First Nation is nation of the Nuu-chah-nulth Tribal Council. The Nation governs 5 reserves with an area of approximately 790 acres. Currently, there are 749 Hesquiaht members, with most members currently living off reserve in other regions of Vancouver Island[15]. Members residing on Hesquiaht lands primarily reside in the Nation's principal community at Hot Springs Cove, approximately 55 kilometres north of Tofino, which is only accessible by air or water.

Economic development on Hesquiaht lands has primarily been focused on growing tourism and natural resource extraction opportunities. These initiatives include two forestry agreements with the Provincial Government and operating tourist sites around Hot Springs Cove.

1.1.9 PACIFIC RIM NATIONAL PARK RESERVE – LONG BEACH UNIT

Pacific Rim National Park Reserve, founded in 1970, is the only national park on Vancouver Island and consists of three separate geographic areas: The Broken Group Islands in Barkley Sound, the West Coast Trail, and Long Beach. The most accessible areas of the park are at Long Beach, a roughly 14,300 ha area of land and ocean located on Highway 4 between Ucluelet and Tofino. The Long Beach Unit is a world-renowned destination for camping, hiking, and surfing due to its extensive beaches and forests.

The Long Beach Unit has seen rapid growth in visitation over recent years and is one of the primary trip generators to the West Coast Region. In 2003, Long Beach had approximately 764,000 visitors, by 2017 the number of visitors had increased to over 1,131,000, a 48% increase over this period. Visitors to Pacific Rim National Park Reserve contribute significantly to the economies in Tofino, Ucluelet, and local First Nations through use of accommodation, retail, and other commercial services.

[15] Hesquiaht First Nation Profile – First Nation Detail. Retrieved from https://fnp-ppn.aadnc-aandc.gc.ca/fnp/Main/Search/FNMain.aspx?BAND_NUMBER=661&lang=eng

2.0 LAND USE SUPPLY

Current land use in the participating communities provides insight into ongoing trends in land use and zoning, and the envisioned land use mix in these communities. Of the participating communities, land use supply is most easily estimated in Tofino and Ucluelet due to their established zoning and land use designations established through the Districts' respective Official Community Plans and Zoning Bylaws. Estimated land use supply in Tofino and Ucluelet combined with vacant and underutilized lands in these communities will inform land use demand projections completed through this project.

2.1 DISTRICT OF TOFINO

Table 1 outlines land use supply in Tofino based on current zoning in the community. From a zoning perspective, approximately 80% of land in Tofino is zoned for either Rural, Marine or Parks & Open Space uses. Single-family residential represents around 11% of the District's land compared to 1.2% zoned for multi-family residential. Tourism commercial is by far the largest commercial zone classification, followed by smaller sections of commercial and service commercial zones. Only 0.82% of Tofino's land base is zoned for industrial uses.

Table 1: District of Tofino Land Use Supply by Zoning

LAND USE / ZONING TYPE	LAND SUPPLY BY ZONING	
	Area (acres)	% of Land
Commercial	27.53	0.60%
Industrial	29.29	0.64%
Institutional	102.95	2.25%
Marine	1860.53	40.70%
Marine Industrial	25.29	0.55%
Mixed-Use	15.02	0.33%
Multi-Family Residential	58.07	1.27%
Parks & Open Space	542.05	11.86%
Rural	1335.86	29.22%
Single-Family Residential	374.02	8.18%
Tourism Commercial	200.78	4.39%
Total	**4571.38 acres**	

Land use supply was further refined to include only those uses that will be most closely considered in the Land Use Demand Study, including residential, commercial, tourism commercial, and industrial zones.

This removed lands that are currently utilized for Rural, Marine or Parks & Open Space uses, and more clearly illustrates the developed land use in the community, as shown in **Table 2**.

Table 2: District of Tofino Land Use Supply by Zoning without Parks, Rural, and Marine Zones

LAND USE / ZONING TYPE	LAND SUPPLY BY ZONING	
	Area (acres)	% of Land
Commercial	27.53	3.41%
Industrial	29.29	3.63%
Institutional	102.95	12.75%
Mixed-Use	15.02	1.86%
Multi-Family Residential	58.07	7.19%
Single-Family Residential	374.02	46.31%
Tourism Commercial	200.78	24.86%
Total	**807.65 acres**	

2.2 DISTRICT OF UCLUELET

In Ucluelet, a similar approach was taken to understand land supply from both the perspectives of zoning and official land use designations. To best approximate future land supply, land use designations from the community Draft Official Community Plan were used along with current zoning information.

Table 3 shows the land supply in Ucluelet by zoning. Due to the large parcels in the District owned by Weyerhaeuser Company and Onni Group, large areas of Ucluelet remain zoned for comprehensive development. These properties are zoned for a variety of uses including single-family and multi-family residential, tourism commercial, and some industrial uses. Single-family residential zoning is the next largest zoning classification, followed by commercial and institutional zones. Compared to Tofino, Ucluelet has a substantial portion of land zoned for industrial uses, but no specific rural zoning in the community.

Table 3: District of Ucluelet Land Use Supply by Zoning

ZONING CLASSIFICATION	LAND SUPPLY BY ZONING	
	Area (acres)	% of Land
Commercial	80.15	5.05%
Comprehensive Development	680.25	42.90%
Industrial	59.93	3.78%

Institutional & Parks	162.28	10.24%
Marine	80.15	1.51%
Marine Industrial	23.97	0.18%
Multi-Family Residential	2.82	1.31%
Single-Family Residential	20.75	27.76%
Tourism Commercial	440.18	7.27%
Total	**1,585.54 acres**	

Like Tofino, land use supply in Ucluelet was refined to summarize only those uses that will be most closely considered in the Land Use Demand Study, including residential, commercial, tourism commercial, and industrial zones, along with the comprehensive development zones. This removed lands that are currently utilized for Marine or Institutional and Parks uses, and more clearly illustrates the developed land use in the community, as shown in **Table 4**.

Table 4: District of Ucluelet Land Use Supply by Zoning without Parks, Rural, and Marine Zones

ZONING CLASSIFICATION	LAND SUPPLY BY ZONING	
	Area (acres)	% of Land
Commercial	80.15	5.74%
Comprehensive Development	680.25	48.71%
Industrial	59.93	4.29%
Multi-Family Residential	2.82	1.49%
Single-Family Residential	20.75	31.52%
Tourism Commercial	440.18	8.25%
Total	**1396.47 acres**	

3.0 SECTOR PROFILE

3.1 TOURISM

The tourism sector remains the largest economic driver in the West Coast Region. With rapid growth expected to continue, more visitors are attracted to the region's natural environment, recreational opportunities, character towns, and unique culture.

The *Economic Impact of Tourism in Tofino, B.C. 2019* report outlines the role tourism plays in Tofino's economy and defines the employment, visitor spending, and tax impacts of the sector. Key findings of the report include:

- Tofino hosts a high number of visitors for the size of the community, approximately 300 per resident.
- Employment opportunities in the tourism industry are plentiful with approximately 2,670 direct jobs in tourism or 1.33 jobs per resident.
- The tourism industry has a substantial financial impact contributing $57m in direct tax impact and $130 m in gross domestic product.
- In the combined Tofino and Ucluelet Census Subdivisions, tourism directly contributes 2,670 jobs. This is greater than the related employment provided by all other occupational categories combined.

The findings of this report are representative of the broader trend of the West Coast Region becoming a premier tourist destination and the resulting economic growth around the region. This success does not appear to be slowing down. Visitation has steadily increased over recent years, particularly as the global economy rebounded from the Great Recession. Traffic to Pacific Rim National Park, an excellent metric of general trends in visitation to the region, has increased by 50% from 2012 to 2018 after a period of visitation decline from 2010 to 2012. Local stakeholders and community partners have observed this growth trend continuing today, and, despite the pandemic, tourism was proven to be a consistent economic driver in the West Coast Region.

A key impact of the expanding tourism industry is seasonal population growth due to visitors and workers, particularly during the peak summer months. The influx of people to the region, while providing economic benefits, is placing acute strain on infrastructure and services, and can affect the quality of life for the permanent population.

3.2 TYPES OF TOURISM

3.2.1 RESORT COMMERCIAL

Tourism commercial uses represent the main commercial activity in the West Coast Region with most of these developments located in the Districts of Tofino and Ucluelet. The following section provides and overview of existing resort commercial development in the two municipalities.

The Economic Impact of Tourism in Tofino, B.C. report identifies that 55.5% of visitors to Tofino stayed in hotels, motels, lodges, or inns or campgrounds and RV Parks. Among commercial uses in Tofino, accommodation occupies the largest amount of land with approximately 593,500 sq. ft. of accommodation throughout the municipality. The *2018 Vital Signs Report* found that 36% of business licenses in Tofino and Ucluelet were issued for accommodation services compared to 26% in 2016. In total,

the number of accommodation units in Tofino in 2020 was 1,953, with 44% located in resorts. **Table 5** shows the unit breakdown of accommodation in Tofino.

Table 5: Total Number of Accommodation Units in Tofino by Accommodation Type

ACCOMMODATION TYPE	TOTAL ACCOMMODATION UNITS	% OF ACCOMMODATION UNITS IN TOFINO
Bed & Breakfast	102	5.2%
Short-Term Rental	441	22.6%
Guest House	3	0.2%
Hostel	51	2.6%
Resort	859	44%
Tourism Commercial	41	2.1%
RV Campgrounds	456	23.3%
Total	**1953**	**100%**

The most recent count of accommodation units in the District of Ucluelet was completed in 2014. Based on this data, the total number of accommodation rooms in Ucluelet was 644 in 2014, with 65.2% in resorts, hotels, or motels. Table 8 shows the breakdown of accommodation by type in Ucluelet for 2014. While a 2020 count of accommodation units is currently unavailable, it is expected that the total number of accommodation units has significantly increased since 2014 given the growth and popularity of the region as a tourist destination. **Table 6** shows the unit break of tourist accommodation in Ucluelet.

Table 6: Total Number of Accommodation Units in Ucluelet by Accommodation Type

ACCOMMODATION TYPE	TOTAL ACCOMMODATION ROOMS	% OF ACCOMMODATION ROOMS IN UCLUELET
Bed & Breakfast	53	8.2%
Short-Term Rental (Cabins & Cottages)	105	16.3%
Guest House	54	8.4%
Hostel	12	1.9%
Resort / Hotel / Motel	420	65.2%
Total	**644**	**100%**

The impacts of the COVID-19 pandemic on the tourism industry were most acutely felt in tourist accommodation. Resort occupancy fell to 0% through April and May of 2020, before rebounding over the summer months; however, occupancies remained below 2019 levels. With limitations on international

travel, resorts in the region will likely rely on domestic visitors. Until long-term solutions are found, the pandemic will continue to affect the tourism economy in the West Coast Region.

3.3 COMMERCIAL

Commercial activity in the Study Area is primarily driven by the tourism sector. Many commercial uses throughout the Study Area both directly and indirectly support the tourism industry by providing key goods and services to support tourism activities in the Region. The 2019 report, *Economic Impact of Tourism in Tofino, B.C.*, estimates a total of 930 jobs generated due to indirect or induced impacts of the tourism industry. This activity contributes an additional $50m in wages and a further $90m in gross domestic product to Tofino's economy. While not quantified to the same extent, it is likely that similar trends exist in Ucluelet and the rest of the West Coast Region as well.

Based on discussions with local stakeholders, it is understood that opportunities to start or expand commercial enterprises are limited due to a variety of factors. Lease rates for commercial space in Tofino are comparable to those in Vancouver and as such, can be unattainable for start-ups or businesses looking to move to the West Coast. These problems also exist in Ucluelet but are less pervasive compared to Tofino.

Commercial space in the Study Area could be divided into a range of different uses, including food and beverage, retail commercial, service commercial, and office. Existing commercial space in Tofino and Ucluelet has been estimated by staff in both Districts. In Tofino, it has been estimated that there is approximately 243,000 sq. ft. of commercial space, while Ucluelet has an estimated 153,500 sq. ft of commercial space.

3.4 TYPES OF COMMERCIAL USE

3.4.1 RESTAURANT

Restaurants in the West Coast Region are varied, from world-renowned fine dining to a blossoming number of casual eateries, capitalizing on the availability of fresh, high-quality local seafood. Restaurants are largely focused within the region's more urban and populous areas, with the largest concentration in Tofino and Ucluelet's village areas.

Food services and restaurant land uses are important sectors in the West Coast Region, largely supporting the tourism industry and servicing the region's large visitor population. As of the 2016 Census, 25.5% and 30.2% of the respective population in Ucluelet and Tofino worked in accommodation and food services, compared to only 8.4% of British Columbia's population. According to the *Economic Impact of Tourism in Tofino, B.C.* report, Food & Beverage is the second largest tourism-related employment type, creating approximately 530 full-time equivalent positions in the District in 2018. The report also identifies that 66.1% of visitors to Tofino will visit a restaurant, food truck, or coffee shop during their stay, making this the second most popular activity for visitors to Tofino.

Restaurants, like many other commercial uses, were identified by stakeholders as acutely experiencing labour shortages, and therefore have been occasionally pressed to reduce their days of operation due to staff feeling overworked.

In 2020, Tofino and Ucluelet had approximately 65,100 sq. ft. and 28,200 sq. ft. of restaurant uses throughout the respective municipalities.

3.4.2 RETAIL COMMERCIAL

Similar to restaurant uses, retail uses on the West Coast are often driven by tourism demand and the large visitor population during the summer months. The 2016 Census identified that 8.8% and 10.3% of the populations in Ucluelet and Tofino worked in retail trade. Across British Columbia, retail trade made up 11.5% of the workforce. The *Economic Impact of Tourism in Tofino, B.C.* report considers retail spending the fourth largest tourism related sector in the District, providing approximately 140 full-time equivalents in 2018. Like restaurants, visiting "local shops or boutiques" is among the most popular activities for visitors, with 41.5% of visitors reporting that they would participate when visiting Tofino.

In 2020, Tofino and Ucluelet had approximately 89,300 sq. ft. and 79,000 sq. ft. of retail commercial uses throughout the respective municipalities.

3.4.3 SERVICE COMMERCIAL

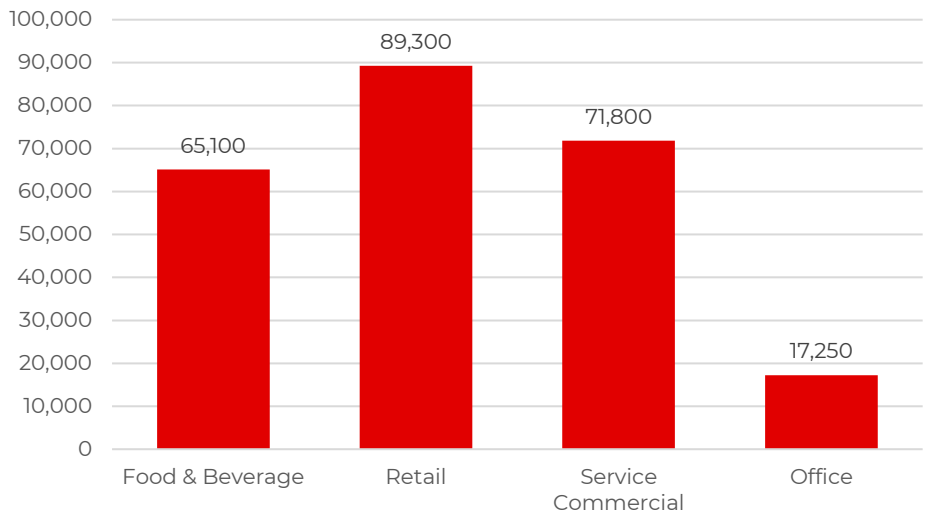
For the purposes of this study, service commercial uses are considered as those offering personal services, including businesses such as financial, real estate, veterinarian, and beauty services. Often these uses are associated with traditional office uses however, in the West Coast Region, these businesses are more likely to be found in retail or industrial spaces.

In 2020, Tofino and Ucluelet had approximately 71,800 sq. ft. and 20,900 sq. ft. of service commercial uses throughout the respective municipalities.

3.4.4 TOTAL ESTIMATED COMMERCIAL SPACE

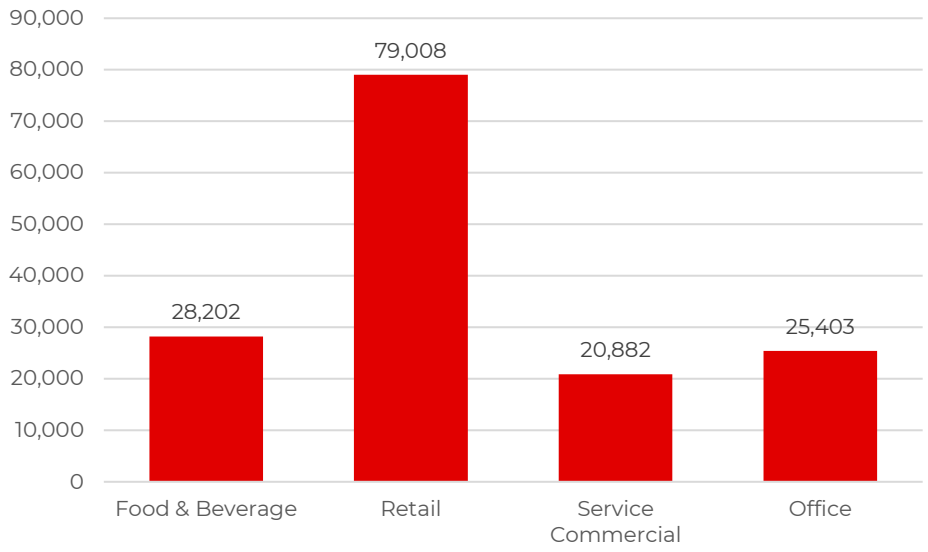
Figure 2 and **Figure 3** display the estimated breakdown of commercial space in Tofino and Ucluelet between food and beverage, retail commercial, service commercial, and office space. It should be noted that due to varying definitions between service, office, and retail commercial there may be a degree of variation for how these are proportioned for both Tofino and Ucluelet.

Figure 2: Total Estimated Commercial Space (sq. ft.), Tofino, 2020



Source: Estimate generated with District staff, 2020

Figure 3: Total Estimated Commercial Space (sq. ft.), Ucluelet, 2020



Source: Estimate generated with District staff, 2020

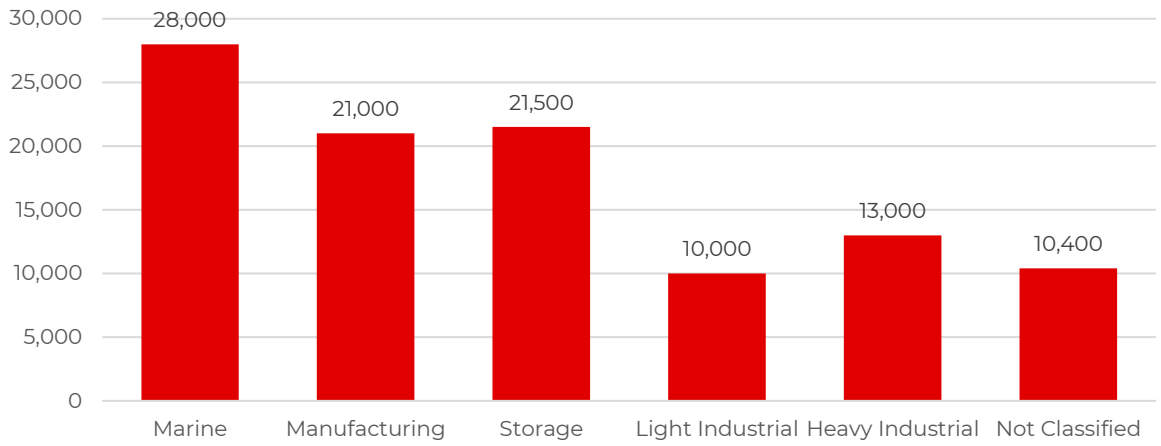
3.5 INDUSTRIAL

Historically, resource-based industries were the backbone of the West Coast Region's economy. In recent years, while industrial uses in Tofino and Ucluelet still play a strong role in the local economy, growth in tourism means that resource-based industries are becoming less critical. Many existing industrial uses are related to marine industries, such as fish processing. Light and heavy industrial, manufacturing, and storage operations also remain prominent in the existing industrial mix. Smaller businesses classified as industrial are likely focused on small scale manufacturing or supporting the tourism sector. Additionally, some service commercial uses such as health and professional services, hair salons, pet stores, banks, and educational services, can be found on some industrially zoned lands.

As of December 2020, industrial uses occupy approximately 61,500 square feet (sq. ft.) of land in Ucluelet and 103,900 sq. ft. of land in Tofino. There is currently very limited industrial development in the region outside of the Districts of Ucluelet and Tofino. Existing industrial uses are primarily marine industrial (47%), followed by storage (27%), light industrial (19%), and manufacturing (8%).

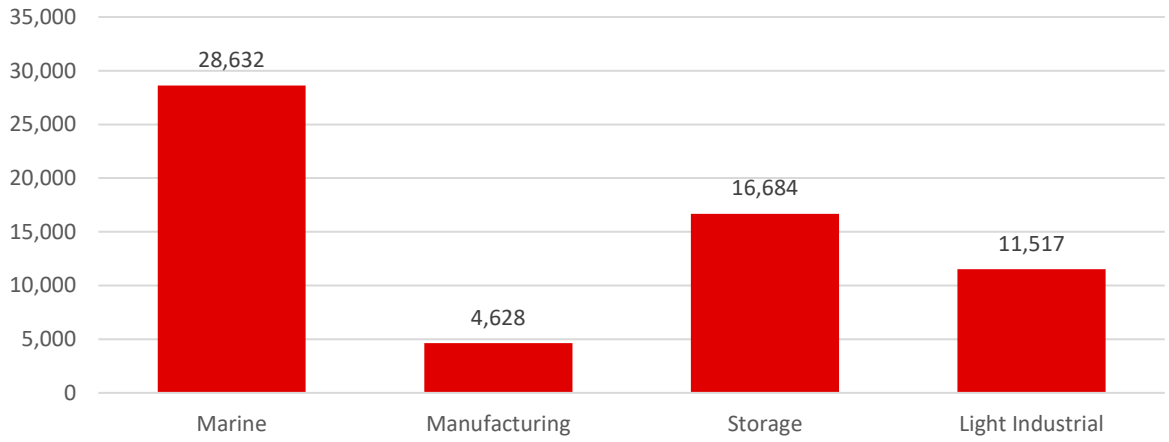
Working with District of Ucluelet and Tofino staff, industrial lands were broken down into sub-categories of industrial uses. In both Tofino and Ucluelet, industrial lands were most commonly categorized under marine-related use. Tofino industrial lands house a significant number of businesses manufacturing goods, whereas Ucluelet only hosts a small number of manufacturing businesses. Both communities have a noteworthy proportion of industrial space dedicated to storage. **Figure 4** and **Figure 5** display the estimated breakdown of industrial space usage for each community.

Figure 4: Total Estimated Industrial Space (sq. ft.), Tofino, 2020



Source: Estimate generated with District staff, 2020

Figure 5: Total Estimated Industrial Space (sq. ft.), Ucluelet, 2020



Source: Estimate generated with District staff, 2020

In 2018, Tofino's primary industrial area, Industrial Way, was studied through the *Industrial Way Review*[16] to help guide the community's Official Community Plan (OCP) review and define requirements for Tofino's industrial lands. The study concluded that the District should retain and expand light industrial land uses in Tofino. Directions identified included increasing the number of permitted industrial uses, limiting commercial or retail expansion onto industrial lands, and creating regulatory opportunities for the provision of staff housing on-site.

[16] District of Tofino, Industrial Way Review (2018)

3.6 INSTITUTIONAL & GOVERNMENT

In Ucluelet, 14.3% of the workforce is employed in government, education, and health care sectors[17]. The same sectors employ 16.9% of the workforce in Tofino[18]. Like commercial and tourism services, these sectors experience seasonal stresses that exacerbate existing issues with access to health care. For example, the *2018 Vital Signs Report* found that visits to the emergency room at Tofino General Hospital approximately double between January-February and peak season in July or August, and total emergency room visits increased 137% between 2012-13 and 2018. Often community members will leave the West Coast Region to seek out health care in other communities, particularly Port Alberni and Nanaimo.

Other emergency services like Search and Rescue, and the Fire Department are volunteer-dependent, with over 200 volunteer hours being dedicated by Westcoast Inland Search and Rescue in 2017. With growing visitation to the West Coast, these services have responded to an average of 15 incidents around Tofino and Ucluelet[19].

3.7 OPPORTUNITIES & CONSTRAINTS

3.7.1 TRANSPORTATION & LOGISTICS

Accessing the West Coast Region has constrained the region's communities. Tofino and Ucluelet can be accessed through the Tofino-Long Beach Airport, float plane, seasonal ferry service or highway. The most common route for people and goods movement is along Highway 4 to Port Alberni and Nanaimo. Most First Nations communities have similar issues with access and can be more difficult to reach, with several communities are only accessible by remote logging roads, water taxi or float plane.

Highway 4 from Port Alberni to Tofino, otherwise known as the Pacific Rim Highway, was constructed in 1959 as a dirt and gravel logging access road. The highway was not paved until 1972[20]. As a result of heavy rainfall and local topography the highway can be challenging to navigate, especially during winter months. Currently, Highway 4 is undergoing significant upgrades to straighten and improve sightlines along the road. From Port Alberni, travel times are approximately 1.5 hours to Ucluelet and 2 hours to Tofino. The closest ferry access to the mainland is in Nanaimo, approximately 1 hour past Port Alberni.

3.7.2 REAL ESTATE & HOUSING

Housing affordability and availability is a predominant issue across Vancouver Island. Real estate and rental markets in Tofino and Ucluelet largely reflect broader trends in increasing housing costs, with the median assessed value of a single-family home in Tofino and Ucluelet rising 39% and 32% respectively from 2012 to 2018. The median assessed value of single-family home in Tofino is $647,500 and $361,000 in Ucluelet compared to $241,300 in Port Alberni.

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[17] Ucluelet Chamber of Commerce, Community Profile (2019). Retrieved from https://ucluelet.ca/images/Consolidated_Community_Profile_Document_Oct_2019.pdf
[18] Invest Tofino, Community Profile (2020). Retrieved from https://static1.squarespace.com/static/55ae982de4b0d41522afbc4b/t/5ea5f8b787c5532a42dd5fe9/1587935419919/Tofino+Community+Profile+-March+2020.pdf
[19] Westcoast Inland Search and Rescue, WISAR Searches. Retrieved from https://www.westcoastsar.org/searches
[20] TranBC, See What Tofino and Ucluelet Was Like in the 1960s. Retrieved from https://www.tranbc.ca/2017/04/06/see-what-tofino-and-ucluelet-was-like-in-the-1960s/

Rental unit availability and cost have also been impacted in both Tofino and Ucluelet. The Clayoquot Biosphere Trust found that rental unit availability between the municipalities steadily decreased between 2013 and 2017, with fewer rental units listed per month on average for one-, two-, and three-bedroom units. As shown in **Table 7** Between the 2013 and 2017 the median listed price of a one-bedroom unit increased 7.7%, two-bedroom unit increased 47.3%, and a three-bedroom unit increased 25.5%[21].

Table 7: Median listed price of rental housing in Tofino and Ucluelet (2013-2017)

RENTAL UNIT TYPE	AVERAGE AVAILABLE RENTAL UNITS (2013)	AVERAGE AVAILABLE RENTAL UNITS (2017)	MEDIAN LISTED PRICE (2013)	MEDIAN LISTED PRICE (2017)	PRICE INCREASE (%)
1 Bedroom	17	4	$650	$700	7.7%
2 Bedroom	11	2	$950	$1,400	47.3%
3 Bedroom	5	1	$1,275	$1,600	25.5%

The Districts of Tofino and Ucluelet are acting to understand housing issues and enable greater supply of affordable housing in the respective municipalities. In 2015, the District of Tofino completed the District's Affordable Housing Needs Assessment which found the following key findings for housing in Tofino:

- The growth in housing supply has not kept pace with Tofino's growing population leading to greater housing unaffordability throughout the District.
- Rising housing costs and limited supply particularly affect vulnerable populations, including low-income seniors and young families. Rental housing is not affordable and insecure and home ownership is largely out-of-reach for many residents.
- The vacation rental market during the summer months places pressure on available housing stock, with limited opportunities for part-time seasonal workers to find adequate housing in Tofino.
- To address affordable housing issues, priority should be placed upon providing supported housing, permanent, year-round rental housing, entry-level homeownership, and shared rental accommodation.

The draft *District of Ucluelet Official Community Plan* identifies that housing affordability issues began to mount with growing tourism activity in the community around 2001. Pressure on housing has also risen due to the success of Tofino's economy and residents working in Tofino seeking more affordable housing in Ucluelet. The District is struggling to house this growing work force, which has implications on the ability for smaller industries or new companies to attract talent to Ucluelet.

[21] Clayoquot Biosphere Trust, Vital Signs 2018 Report. Retrieved from https://clayoquotbiosphere.org/research/vital-signs

These findings reflect broader trends throughout the region, where economic growth and greater access to these communities coupled with a lack of new housing supply has led to widespread housing affordability issues. The Land Use Demand Study aims to identify opportunities for local, provincial, and First Nations governments to address these issues through achieving the highest and best use of vacant or underutilized land under their jurisdiction.

3.7.3 FIRST NATIONS

Nuu-chah-nulth culture is strong and highly evident throughout the region. The four nations involved in this study all have pursued economic development opportunities in line with prevailing economic trends, with successful investment in tourism, accommodation, fisheries, and renewable energy. First Nations around Clayoquot Sound will continue to leverage their strategic advantages in many of these areas to continue building strong local economies that benefit their members and communities.

As a result, the opportunity for local, regional, provincial, federal, and First Nations governments to continue to build partnerships could bring mutually beneficial economic outcomes and land use efficiencies. Constraints on the available land in the West Coast Region mean that First Nation land development could constitute a significant portion of new development in coming years.

3.7.4 CLIMATE CHANGE

Climate change will have profound impacts around coastal British Columbia. The combined effects of sea-level rise and a warming climate will threaten the unique ecosystems and natural processes that define Clayoquot and Barkley Sound and underpin the West Coast Region's economy. Several key economic key sectors are directly dependent on a healthy environment for their continued success, including natural resource extraction, food production, and tourism. Climate change impacts will also stress local infrastructure with increasingly inconsistent temperature and precipitation patterns, and more intense storms in the Region.

Much of the tourism industry in the West Coast Region is drawn to recreational opportunities provided by the area's marine and terrestrial ecosystems. With the threat these conditions, significant investment will have to be made to both adapt current land uses to a changing climate and to ensure that the impacts on future land uses are similarly mitigated. The *Tofino V2A Sustainable Community Action Plan* acknowledges that tourism presents opportunities for the community, while also potentially exposing local ecosystems to intensive use and degradation. This presents a challenge for economic and land development to fit within the West Coast Region's local carrying capacity.

Local government is acting, with targets established to reduce the communities' impacts on the local environment. For example, the District of Ucluelet has adopted a Climate Action Plan under which the District has committed to achieving 100% renewable energy and 80% emissions reductions in Ucluelet by 2050.

4.0 LAND USE DEMAND & MARKET OPPORTUNITY

This section describes market opportunities and land use demand in the West Coast Region ("the region"), comprising the Districts of Ucluelet and Tofino, surrounding areas of the ACRD, and First Nations communities.

Based on the current supply and condition of land uses studied and described in the Introduction, Land Use Supply section, and Sector Profiles, this section identifies growth and demand considerations to support strategic decision-making and long-range planning for development and infrastructure throughout the region. It is based on an analysis of economic conditions and market opportunities in the region using available data and information provided by key stakeholders.

Each section outlines market opportunities and demand considerations for the following land uses, including assessments of local and regional demand drivers and competitive supply conditions:

- Residential
- Tourism accommodation
- Commercial and industrial

In recognition of the unprecedented international economic impacts of the COVID-19 pandemic, this report also provides an overview of ongoing and anticipated impacts and opportunities related to the pandemic. These effects are expected to persist for months to years.

4.1 RESIDENTIAL MARKET OPPORTUNITY

Data in this section was gathered from the following sources:

- Stakeholder interviews
- Multiple Listings Service (MLS) data
- Data provided by Judy Gray Team Real Estate
- Statistics Canada
- Environics (custom projections based on Statistics Canada Census data)
- 2016 Affordable Housing Needs Assessment
- 2018 Clayoquot Sound Biosphere Region Vital Signs Report
- BC Housing
- Tofino Housing Corporation 2017 Housing Survey

Assumptions are described throughout this section. Some overarching assumptions are as follows:

- Projections are based on past growth trends and assume that in the future, things will continue to change in the same way they have been changing in the past.
- Projections are based on national patterns of past growth. When scaled down to a small population like the study area, these patterns can have larger impacts than may actually be felt. Further, in small populations, a single large project can have a large impact on overall community trends, and this may not be captured in the national patterns used.
- All projections have been prepared for the study area outlined in **Figure 1** unless otherwise noted.

4.1.1 PRIMARY INDICATORS

As a starting point, future demand for residential development can be estimated based on population projections. Population projections can be used to estimate the number of new households that are expected to form, which can provide an indication of how many new housing units could be needed.

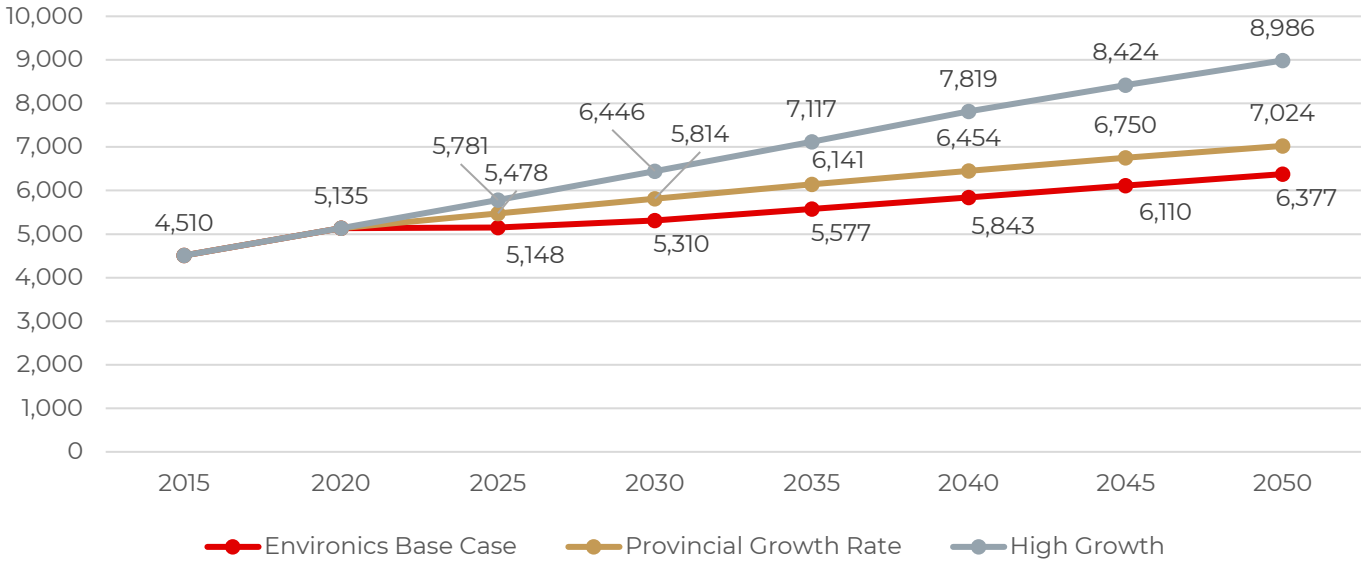
It is important to note that all projections are based on past growth trends and assume that in the future, things will continue to change in the same way they have been changing in the past. Projections do not account for events that may increase migration to or from the area, such as the COVID-19 pandemic and large-scale transitions to working from home. In reality, shifts like this, as well as locational desirability, market trends, economic opportunities, and more will impact the number of people living in the area and related demand for residential, commercial, and industrial land use.

Figure 6 shows estimated population from the latest Census, with projections to 2050.[22] Three scenarios are offered. The low growth scenario, "Environics Base Case", was prepared by Environics based on national population trends and extended to 2050. The medium growth scenario, "Provincial Growth Rate", is based on past population growth in the regional health area, a method commonly used by BC Stats. The third "High Growth" scenario assumes that the population will grow at a similar rate as the growth estimated for 2015 – 2020 for a few years (i.e., around 2.4%), before becoming more moderate (i.e., declining to 1.3%).

Under the Environics Base Case scenario, there could be 6,377 people by 2050, an increase of 24.2% from 2020. Using the Provincial Growth Rate, the population is projected to reach 7,024 by 2050, an increase of 36.8% from 2020. Finally, the High Growth scenario the rate of change remains at the rate projected for 2025 – 2030, by 2050 there could be 8,986 people, an increase of 75.0% from 2020.

[22] Note that as the last official Census count was completed in 2016, 2020 figures are estimates based on the 2016 baseline. As count was completed in 2016, it is considered to capture end-of-year 2015 data and is labelled as such throughout this section.

Figure 6: Estimated and Projected Population, West Coast Region, 2015 – 2050



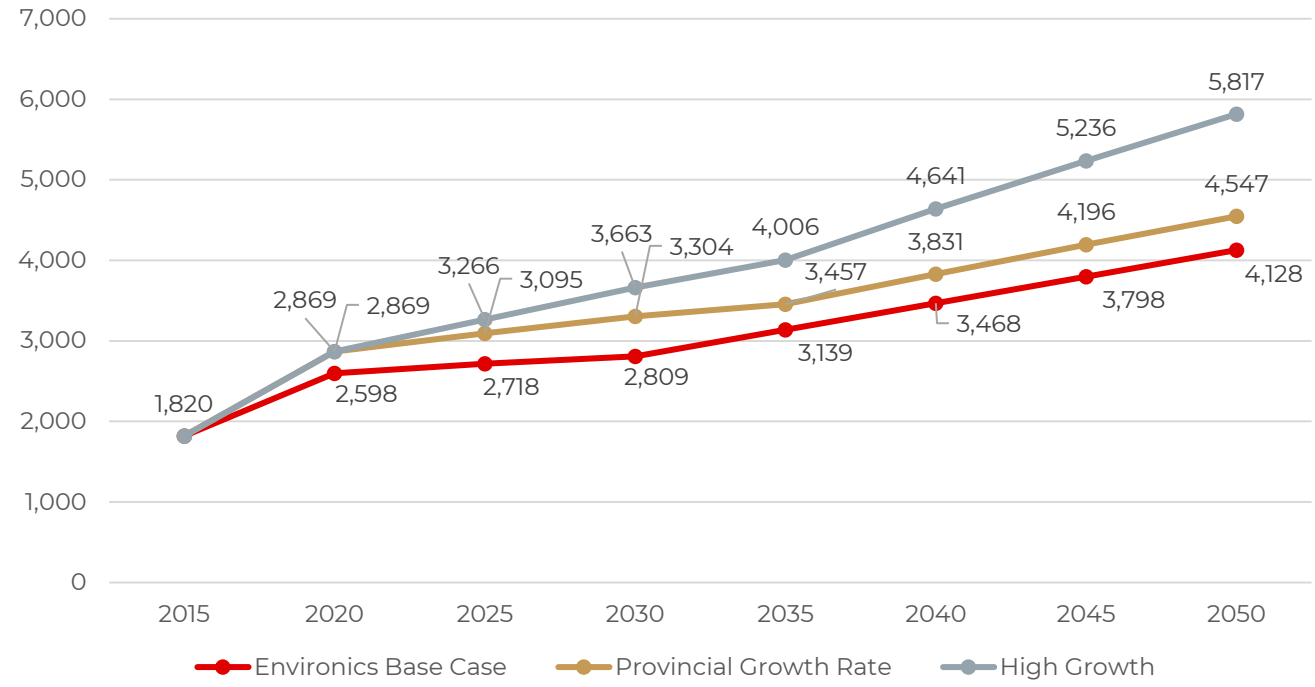
Source: Environics, 2020, BC Stats, and custom projections

Between 2015 and 2030, the number of households is projected to increase at a much faster pace than population (**Figure 7**). Under the Environics Base Case scenario, there could be 4,128 households by 2050, an increase of 58.9% from 2020. Using the Provincial Growth Rate, the number of households is projected to reach 4,574 by 2050, an increase of 58.5% from 2020. Finally, under the High Growth scenario, there could be 5,817 households by 2050, an increase of 102.8% from 2020.

These higher growth rates relative to population growth indicates that average household sizes are projected to shrink. In 2015, the average household size was 2.5 people per household. It is projected that the average household size could be 1.9 by 2030 and 1.5 by 2050. This trend could reflect increased numbers of tourism, service, and accommodation sector staff living in small housing units. Typically, staff are younger adults living alone or with one other person and do not have large households with children. Shrinking household sizes are also typical of aging populations, which can result in smaller average household sizes as children age and move away from home. The median age for the region is projected to increase from 38.4 in 2015 to 42.3 by 2030. This is consistent with national aging trends, although the projected change for the West Coast Region is more pronounced than the trend projected for the province as a whole. The trend may be amplified because it is a national trend applied to a small population.

Under the Base Case scenario, it is estimated there was demand for demand for approximately 778 new homes to accommodate new households formed between 2015 and 2020 and there will be demand for another 1,530 between 2020 and 2050 (**Figure 7**). The Provincial Growth Rate scenario suggests there was demand for approximately 1,049 new homes between 2015 and 2020 and there will be demand for another 1,678 between 2020 and 2050. Under the High Growth scenario, there was demand for approximately 1,049 new homes between 2015 and 2020 and there will be demand for another 2,948 between 2020 and 2050.

Figure 7: Estimated and Projected Households, West Coast Region, 2015 – 2050



Source: Environics, 2020 and custom projections

Household projections from 2015 – 2020 can be compared the number of building permits issued over the same timeframe, to see whether residential development aligned with projections over that time, or whether there may be unmet demand existing in the residential market.

Stakeholders indicated that there is unmet demand, suggesting that current housing supply is not meeting community needs. There is not enough housing for residents and workers coming into the community, which is constraining development in the commercial and tourism sectors. Real estate and development professionals indicated that the ownership market is highly competitive, and prices have risen substantially in recent years. It was suggested that there is latent demand for many types of housing in the region, including:

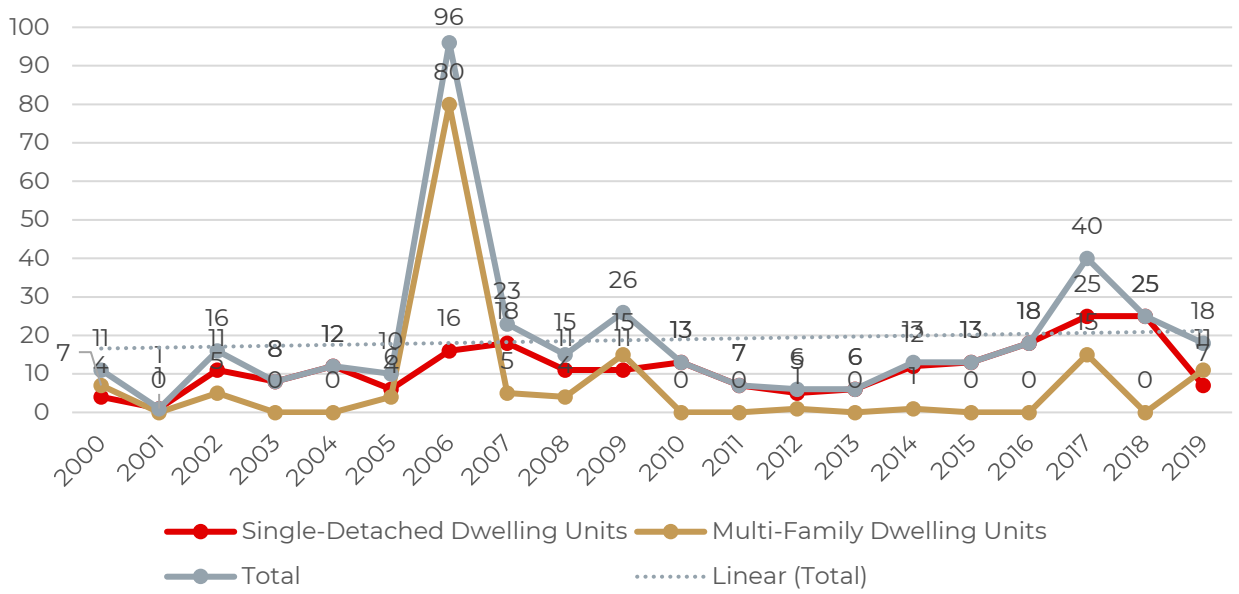
- Units at affordable prices for existing residents looking to upsize (i.e., families) or downsize (i.e., seniors)
- Single-detached housing for people moving from elsewhere
- Multi-family units (to significantly increase supply quickly)
- Workforce housing
- Non-market housing (e.g., Tofino Housing Corporation units

In 2016, 2017, 2018, and 2019, there were 101 residential building permits issued in Ucluelet and 92 in Tofino, for a combined total of 193 (**Figure 8**, **Figure 9**). This aligns with findings from stakeholder interviews, suggesting there is significant latent demand existing in the market, with estimates ranging from 585 to 856 units. This can create competition for available residential units. However, some of the growth in households was likely accommodated by units built outside the Districts and not accounted for in building permit data. There is no data available for these areas.

Figure 8 and **Figure 9** show building permit data for Ucluelet and Tofino. Based on this data, residential development in Ucluelet has fluctuated over the past 20 years. There was a spike in the number of

permits issued in 2006, when 75 permits were issued for apartments. Overall, there is a slight upward trend, especially since 2015.

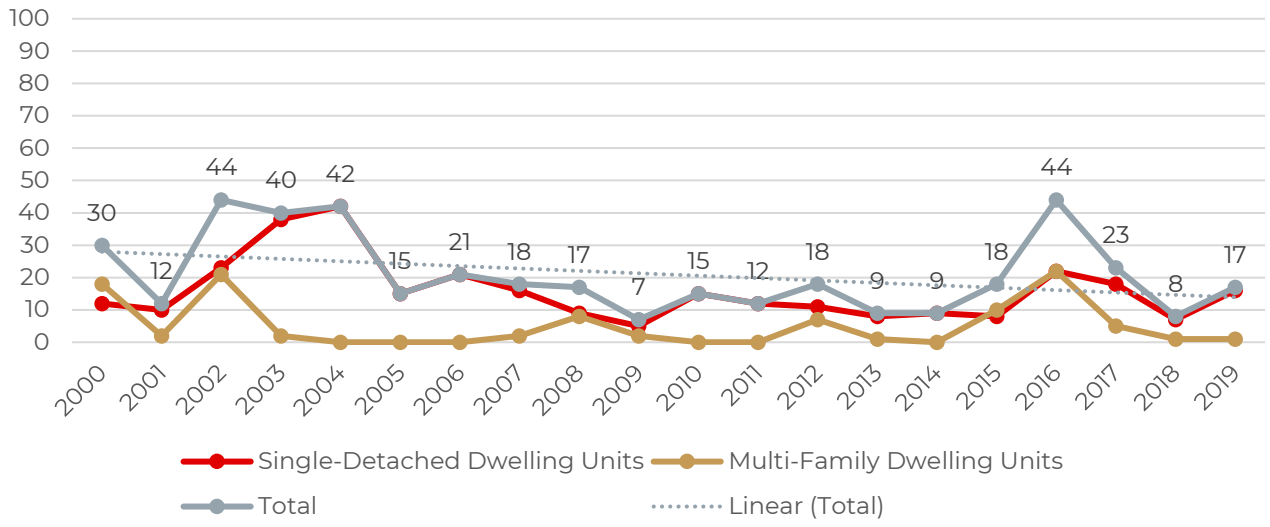
Figure 8: District of Ucluelet Building Permits Issued, 2000 – 2019



Source: District of Ucluelet, 2020

Building permit data for Tofino suggests that development activity began to increase earlier than Ucluelet, from 2001 to 2006, before dipping around 2007 to 2008. This aligns with information provided by stakeholders from the real estate and development industries, who suggested that there was a lot of development activity in the early 2000s. Stakeholders indicated that development activity decreased with the 2007 / 2008 recession and began to rise again around 2015. This also aligns with real estate trends seen across BC, where home prices have increased substantially since 2015. Overall, there is a slight downward trend, however, stakeholders predict the current level of development will be sustained for the short-term.

Figure 9: District of Tofino Building Permits Issued, 2000 – 2019



Source: District of Tofino, 2020

Stakeholders reported that Tofino was the first of the two communities to experience a residential market boom, which was then echoed in Ucluelet. Residential demand in Ucluelet will likely continue to trend upwards as there is less remaining developable land in Tofino, and due to its relative affordability compared to Tofino, as well as the large Onni and Weyerhaeuser projects currently in the development process.

Demand for Staff Housing

Staff housing demand is difficult to estimate for a variety of reasons. Many staff are not captured in Censuses if they were not living in a permanent dwelling during the Census count. If they were living in collective dwellings, some Census data indicators are unavailable. It is difficult to estimate how many staff are looking for permanent accommodation and how many are looking for temporary accommodation.

Tables 16 and 17 show that there were 50 people commuting from Port Alberni to Tofino and 80 commuting from Port Alberni to Ucluelet for work in 2016, representing 4.2% of all commuters to Tofino and 9.8% of all commuters to Ucluelet. If the proportion of the population commuting from Port Alberni is held constant, this could equal approximately 67 – 74 commuters to Tofino and 107 to 118 commuters to Ucluelet by 2050. These workers may be commuting because they are unable to find appropriate housing in the West Coast Region.

In 2017, the Tofino Housing Corporation conducted a survey of employers and households about their housing needs. It was estimated there were approximately 800 to 1,000 staff accommodation beds with a shortage of 350+ beds for employees year-round, and 600+ during peak season.[23] In total, this suggests there were approximately 1,150 – 1,350 staff looking for beds year-round, and 1,400 – 1,600 during peak season in Tofino. As tourism has grown in West Coast Region, it can be assumed that the need for staff accommodation has grown as well.

[23] Data from the 2017 Tofino Housing Corporation Survey, which covers the District of Tofino alone. There is no equivalent data for Ucluelet or the remainder of the study area.

Market Residential Demand by Type

To estimate the number of housing units of each type required in the future, it is necessary to make assumptions about future distribution of structural types. Based on building permit data provided by the Districts of Tofino and Ucluelet, market preferences, and findings from stakeholder interviews, demand is assumed to shift towards a lower proportion of single-detached homes and higher proportions of missing middle housing, such as duplexes, triplexes, or townhouses, among other housing typologies, and apartment units required in the future. **Table 8** shows the distribution of structure types recorded in the 2015 Census and the distribution of structure types assumed for new households formed between 2020 and 2050.

Note that these projections are based on occupied private dwellings by structure type, as collected in the Census. This means they only capture natural increase in the number of permanent resident households. They do not include dwellings that were not occupied on the day of the Census count in 2015, which was approximately 27.2% of homes in Tofino, 12.4% of homes in Ucluelet, and 25.7% of homes in Electoral Area C.[24] These are also called "shadow homes" and many are secondary homes / residential properties. Demand for these homes is covered in more detail in Section 4.1.3.

Table 8: *Projected Demand by Structural Type*

STRUCTURAL TYPE	PROPORTION OF ALL DWELLINGS		NUMBER OF UNITS REQUIRED, 2050		
	2015	2050	Low	Medium	High
Single-detached	64.5%	60.0%	918	1,007	1,768
Missing Middle	11.0%	15.0%	230	252	442
Apartment	17.2%	20.0%	306	336	589
Other	7.2%	5.0%	77	84	147
Total	**100%**	**100%**	**1,530**	**1,678**	**2,947**

Source: Environics 2020 and custom projections

It is important to note that market trends, consumer preferences, and unknown factors such as the COVID-19 pandemic can have a large impact on the number of units of each type needed. It is important to recognize this when using and applying these projections to strategic planning.

As projections show the average household size is expected to decrease with an aging population, there could be increased demand for smaller, accessible unit forms that are suitable for seniors looking to downsize than is projected in **Table 8**. At the same time, stakeholders report increased recent demand for single-detached homes from people working from home and moving to Tofino or looking for holiday homes. These are just some factors that can greatly influence the types of dwellings that are needed in the future.

The 2017 Tofino Housing Corporation household survey found that demand was highest for attainable homeownership units, with 49% of households who responded to the survey indicating they would like Tofino Housing Corporation to build more attainable homeownership units. This was closely followed by demand for small housing (45%) and rental housing (43%). When asked about their preferred size of housing, 32% of respondents identified one-bedroom units and 35% identified two-bedroom units. The remaining respondents identified three-bedroom (18%) and studio (16%) units.

[24] 2016 Census Profiles, Statistics Canada

4.1.2 SECONDARY INDICATORS

In addition to projected population needs, demand can be estimated based on real estate trends such as the number of days listings are on the market, the difference between sales and asking prices, and who is buying properties. Note that while traditionally, absorption rates are also used as an indicator of demand, stakeholders reported it is not an ideal indicator for demand in the West Coast Region. This is because there were not enough residential projects developed in the past five to ten years to provide a sufficient sample for analysis and some large projects that were developed experienced issues that slowed absorption.

Days on the Market

Number of days on the market can suggest whether there is existing, unmet demand in the residential market. If residential properties are selling quickly, this can indicate that the residential market is competitive. Stakeholders indicated that, following the 2008 financial crisis, the residential market in the region was slow to recover, reaching perceived 2007 levels of activity again around 2018. Stakeholders reported that generally, trends hit Tofino first, then Ucluelet, then surrounding areas in the West Coast Region. In 2017, when the market was reported to be strong, the median number of days on market was 21 for single-detached homes in Tofino (**Table 9**) and 32 for single-detached homes in Ucluelet (**Table 10**). In Tofino, median days on market fluctuated between 2017 and 2020. In 2020, the median number of days on market is similar to 2017 for single-detached homes and much lower for apartments and vacant lots. In Ucluelet, there was an increase in 2018 and 2019, before dropping in 2020. This suggests that demand has increased recently, especially for apartments and vacant lots.

Table 9: Median Number of Days on Market, Tofino, 2017 – 2020 (YTD)

PROPERTY TYPE	2017		2018		2019		2020	
	Range	Median	Range	Median	Range	Median	Range	Median
Single-Detached	*0 – 362*	21	*1 – 254*	10	*7 – 281*	53	*0 – 362*	34
Apartment	*0 – 699*	60	*10 – 699*	172	*15 – 535*	122	*1 – 541*	9
Vacant Lot	*1 – 1,084*	157	*n/a*	14	*3 – 50*	15	*3 – 1,039*	64

Source: MLS data provided by Judy Gray Real Estate Team, 2020

Table 10: Median Number of Days on Market, Ucluelet, 2017 – 2020 (YTD)

PROPERTY TYPE	2017		2018		2019		2020	
	Range	Median	Range	Median	Range	Median	Range	Median
Single-Detached	*4 – 879*	32	*6 – 344*	72	*6 – 1,051*	68	*0 – 272*	32
Apartment	*1 – 400*	33	*2 – 590*	11	*3 – 75*	21	*5 – 427*	26
Vacant Lot	*2 – 1,367*	132	*1 – 780*	133	*2 – 690*	61	*3 – 281*	84

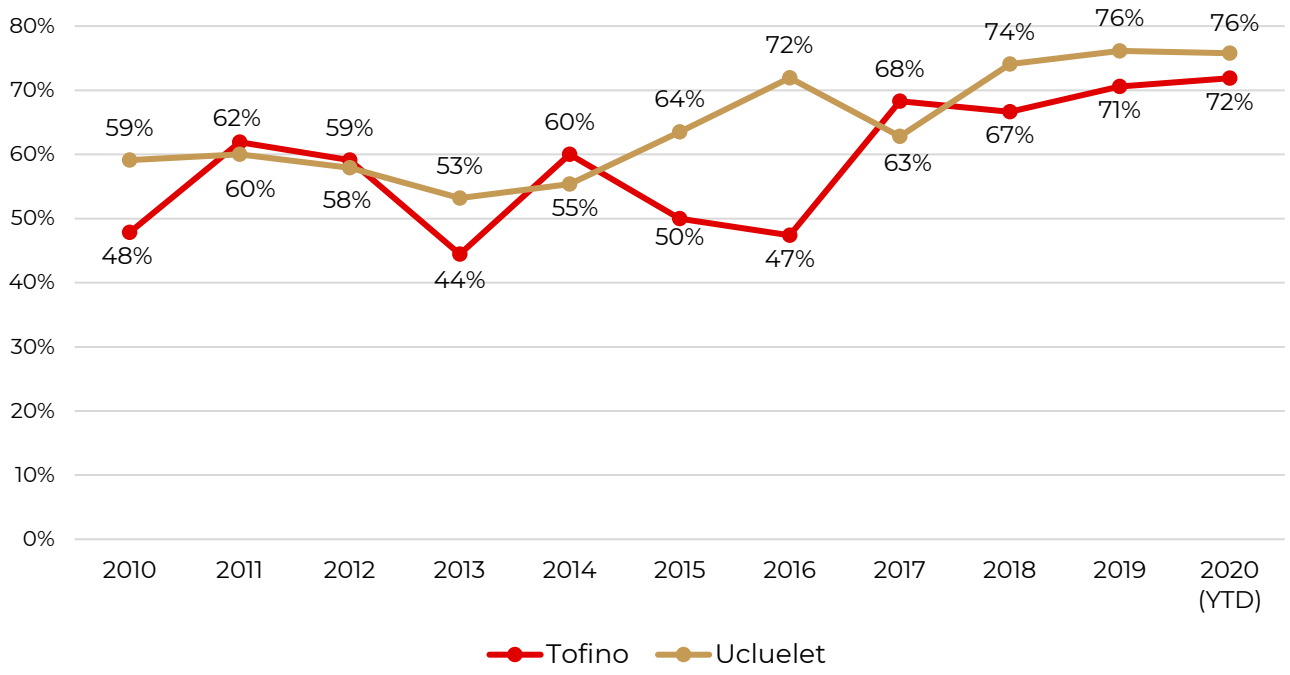
Source: MLS data provided by Judy Gray Real Estate Team, 2020

Since the COVID-19 pandemic, stakeholders interviewed suggested that waterfront homes have been selling more quickly at higher prices. Stakeholders also reported there is increased demand recently from people who can work from home moving to the area.

Buyer Profile

Stakeholders also reported that since fibreoptic service was installed, the types of buyers purchasing residential properties has changed. Fibreoptic service allows for faster internet and better connectivity and is important to many people who work remotely. Stakeholders linked fibreoptic service to increased numbers of buyers coming into the region from elsewhere. **Figure 10** shows the proportion of sales transactions by the Judy Gray Real Estate Team that involved buyers from outside the West Coast Region. While this a snapshot from one team, it provides a sense of trend in the region; there was an increasing proportion of sales to buyers from outside the region over this time. This reaffirms the increasing popularity of the residential market.

Figure 10: Proportion of Annual Sales to Buyers from Outside Region, Tofino and Ucluelet, 2010 – 2020 (YTD)



Source: Data shared by Judy Gray Real Estate Team, 2020

Projections suggest that, at the Base Case scenario, the proportion of households with children is expected to decrease over the next ten years. At the same time, stakeholders reported seeing more young working adults moving to the West Coast Region with their children. As projections are primarily based on past trends, it is possible that while the proportion of households with children decreases through natural population change (i.e., births and deaths), this could be counteracted by increased migration from outside the region. Alternately, the number of children in the region could increase, but comprise a smaller relative proportion of overall population increase compared to the increase in the number of older adults and other households without children.

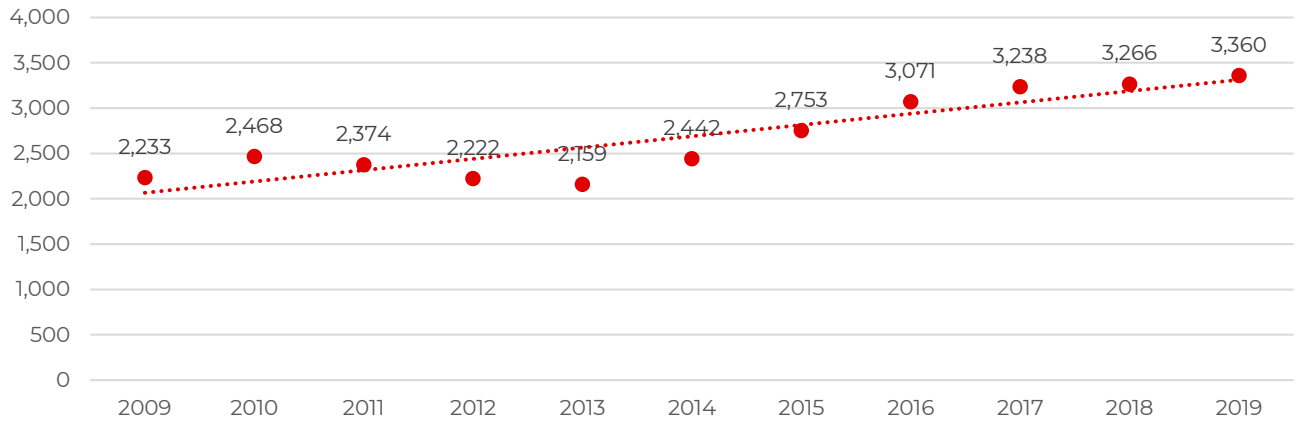
4.1.3 DEMAND FOR SECONDARY HOMES / RECREATIONAL PROPERTIES

The West Coast Region is widely recognized as a popular recreational or secondary home destination. Over the past few years, there has been a trend of homeowners in Metro Vancouver capitalizing on home equity to purchase secondary or recreational homes. As the population ages, demand in this part of the market is increasingly coming from retirees. In 2017, its was reported that year-over-year demand has increased for secondary homes across BC, as buyers were observed to be pushing outwards, looking to purchase outside the competitive Metro Vancouver market to areas that are relatively more affordable. As the market in the Fraser Valley started to mirror Metro Vancouver trends, this demand radiated further outwards, to areas such as Vancouver Island.[25]

It is difficult to project demand for secondary homes / recreational properties for many reasons. One of the main reasons is that buyers cannot be traced back to a single geography and may be coming from many different places, which means that demand cannot be estimated based on population growth for a certain jurisdiction. Additionally, consumer preferences flux among other popular secondary home / recreational property locations, such as the Okanagan, Gulf Islands, Sea-to-Sky Corridor, Sunshine Coast, and more.

Proxy measurements can be used to provide a sense of demand based on past trends. Average annual daily traffic counts from the Tofino-Ucluelet Highway show increasing numbers of visitors over the past ten years (**Figure 11**). This demonstrates there is growing interest in the region and increasing visitation, pointing towards increasing demand for secondary homes / recreational properties.

Figure 11: Average Annual Daily Traffic on Tofino-Ucluelet Hwy South of Ucluelet Junction, 2009 – 2019



Source: Ministry of Transportation and Infrastructure, 2020

One indicator of past secondary home / recreational property trends that can be used to estimate future demand is the "shadow population" in a community. The shadow population is an estimate of the seasonal population. It is determined by comparing Census data for the total number of private residential dwellings (i.e., housing stock) to the number of dwellings occupied by their usual residents on the day of the Census count (i.e., permanent homes). **Table 11** shows the number of dwellings and estimated shadow units for communities within the study area.

[25] https://docs.rlpnetwork.com/RLPRecReport/Royal_LePage_2017RecreationalReport_BC.pdf

Table 11: Occupied Dwellings and Estimated Shadow Populations, West Coast Region, 2016

	POPULATION 2016	TOTAL PRIVATE DWELLINGS	PRIVATE DWELLINGS OCCUPIED BY USUAL RESIDENTS	ESTIMATED SHADOW DWELLING UNITS	ESTIMATED PEAK SHADOW POPULATION	PERCENT OF DWELLINGS THAT ARE SECONDARY DWELLINGS
Tofino	1,932	1,037	755	282	649	27%
Ucluelet	1,717	841	737	104	229	12%
ACRD Electoral Area C	677	359	267	92	221	26%
Toquaht First Nation	19	11	9	2	4	18%
Ucluelet First Nation	274	97	87	10	32	10%
Tla-o-qui-aht First Nation	361	37	29	8	26	22%
Total	**4,980**	**2,382**	**1,884**	**498**	**1,160**	

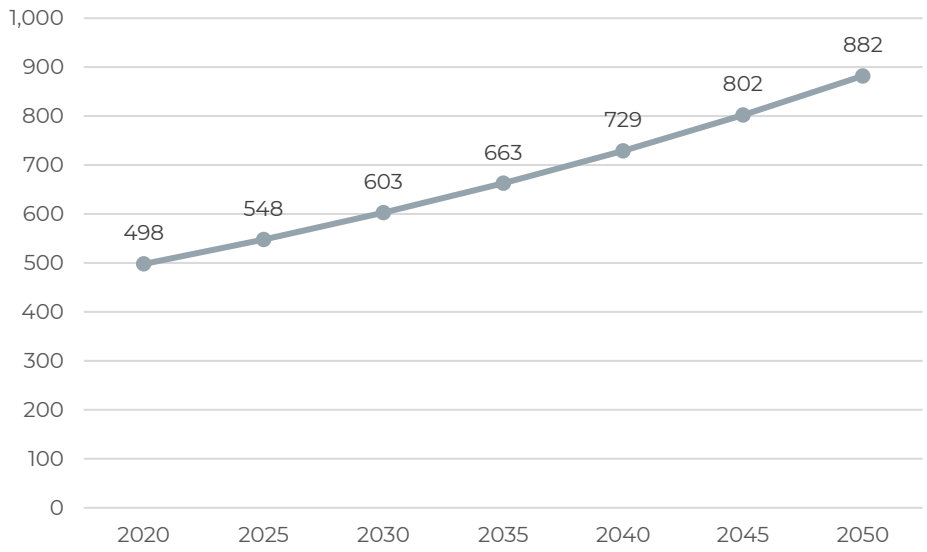
Source: Statistics Canada, Census 2016, and custom analysis

Note: These totals do not match the totals used in Section 4.1.1 because the geographies differ slightly.

Projections prepared for the District of Tofino as part of a study for a new wastewater treatment plant suggest that the shadow population is projected to grow by 1.1% per year to 2040. This can be applied to the total shadow population estimate for the region to provide a rough estimate of future demand for secondary homes / recreational properties.

Figure 12 shows the projected number of shadow households based on **Table** 11: Occupied Dwellings and **Estimated Shadow Populations**, West Coast Region, 2016assuming the average household size for shadow households remains the same as 2020 (2.3 persons per household). This suggests that there could be demand for 384 new secondary homes / residential properties in the region by 2050. In reality, as the total permanent population is projected to grow more quickly than 1.1% for the next few years, growth could be higher than is indicated here.

Figure 12: Projected Number of Shadow Households, West Coast Region, 2020 - 2050



Source: Custom projections based on 2020 District of Tofino OCP and 2019 population forecasts prepared for the Wastewater Treatment Plant

Based on an assumed distribution of preferred housing types, **Table 12** shows the number of single-detached, missing middle, apartment, and other housing units that could be required to meet demand for secondary homes in 2050. As described in Section 4.1.1, it is necessary to make assumptions about future demand for structural types. For secondary homes / recreational properties, it is assumed demand will primarily remain for single-detached homes, with some demand for more affordable missing middle and apartment units.

Table 12: Projected Demand by Structural Type for Secondary Homes

STRUCTURAL TYPE	PROPORTION OF ALL DWELLINGS, 2050	NUMBER OF UNITS REQUIRED
Single-detached	50%	192
Missing Middle	25%	96
Apartment	25%	96
Other	0%	0
Total	**100%**	**384**

4.1.4 NON-MARKET RESIDENTIAL DEMAND

The housing continuum is a way of considering housing types and options available to households of different income levels and housing needs, ranging from emergency shelter to market ownership housing (**Figure 13**).

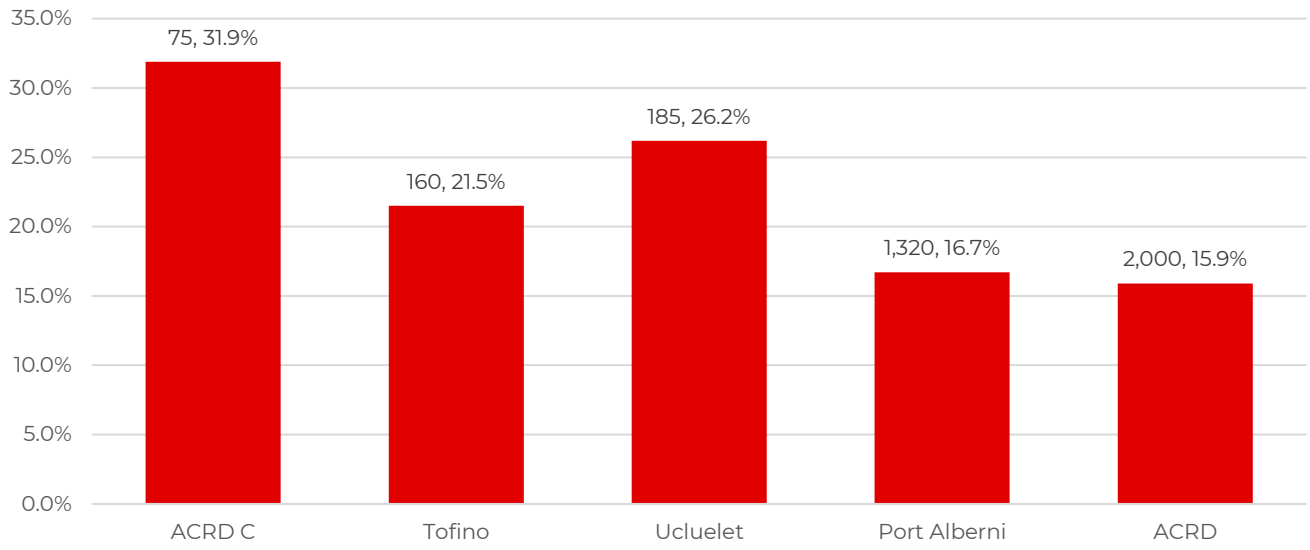
Figure 13: Housing Continuum

Source: Urban Matters, 2020

Non-market housing needs can be determined in part by the number of households in core housing need. Core housing need is a two-step indicator developed by Statistics Canada and the Canadian Mortgage and Housing Corporation, which is designed to identify the households most in need of housing support. Households in Core Housing Need cannot afford median rents in the community and many require non-market housing options to address their needs.

In 2016, there were 160 households in core housing need in Tofino, 185 in Ucluelet, and 75 in ACRD Electoral Area C (**Figure 14**). For the study area as a whole, it is estimated there were 383 households in Core Housing Need and 1,615 occupied private dwellings, for a rate of 23.7%. This assumes that half of households in Alberni-Clayoquot Electoral Area C ("Long Beach") are located within the study area. This is a higher rate of Core Housing Need compared to Port Alberni and the ACRD. This could indicate need for 383 social housing or below market (i.e., non-market) housing units in the region in 2016.

Figure 14: Core Housing Need, 2016



Source: Statistics Canada, Census, 2016

If this proportion is held constant, there could be 978 to 1,378 households in Core Housing Need in the study area by 2050. This could indicate need for 595 to 995 more non-market housing units in the region to accommodate growth, in addition to the 383 units needed in 2016.

It is important to note that the rate of Core Housing Need will only remain the same as 2016 if existing affordability gaps do not increase and the same number of non-market housing supports are available. In reality, the number of households in Core Housing Need may grow, or some households may leave the

community if unaffordability becomes worse due to increasing housing costs or other economic impacts that affect their ability to maintain their house, or if there are not enough non-market housing supports available.

In the West Coast Region, there were 40 units of subsidized housing as of March 31, 2018. This included:

- Two transition houses for women and families
- Four one-bedroom units for seniors at Mount Colnet Villa
- M'akola housing for Indigenous community members

Currently, there is a development of rental and affordable homeownership units underway in Ucluelet, called First Light. This is expected to provide 33 small homes, including 11 rental units for local residents and 22 affordable homeownership units in partnership with BC Housing.

4.1.5 KEY TAKEAWAYS

- There is existing latent demand for housing for residents and workers (year-round and seasonal).
- Population trends and projections suggest the population is aging and average household sizes are decreasing.
- Stakeholders perceive recent demand for single-detached homes from people moving into the community from elsewhere, including families with children.
- Stakeholders do not expect demand to slow in the near future.
- Projections indicate there could be need for 1,530 to 2,948 new housing units by 2050 to accommodate a potential population of 6,377 to 8,986.
    - Estimates and data suggest that there could be additional latent demand for 585 to 856 housing units existing in the West Coast Region as the number of residential building permits issued between 2015 and 2020 was much smaller than the estimated growth in households over the same timeframe. However, some of this demand was likely accommodated outside the Districts and is not accounted for in building permit data.
    - In 2017, there was unmet demand for 350+ year-round staff beds and 600+ seasonally in Tofino. In 2016, there were 50 people commuting to Tofino from Port Alberni for work and 80 to Ucluelet, who may be unable to find appropriate housing locally. As tourism has grown in West Coast Region, it can be assumed that the need for staff accommodation has grown as well. If the proportion of the population commuting from Port Alberni is held constant, this could be 67 – 74 commuters to Tofino and 107 – 118 commuters to Ucluelet by 2050.
    - Estimates based on the number of shadow households suggest that, in addition to the demand for new housing units based on population growth, there could be demand for 384 new secondary homes / residential properties in the region by 2050.
    - If the proportion of households in Core Housing Need remains the same, there could be 978 to 1,378 households in Core Housing Need in the study area by 2050. Households in Core Housing Need often need non-market housing supports to move out of Core Housing Need.

4.2 TOURISM ACCOMMODATION MARKET OPPORTUNITY

Data in this section was gathered from the following sources:

- Stakeholder interviews
- AirDNA (custom data compilation)
- *Economic Impact of Tourism in Tofino B.C.* report, prepared for Tourism Tofino by InterVISTAS consulting
- District of Tofino
- Parks Canada
- Ministry of Transportation and Infrastructure
- STR Ltd. via Tofino Industry News

Some key assumptions affecting this section are as follows:

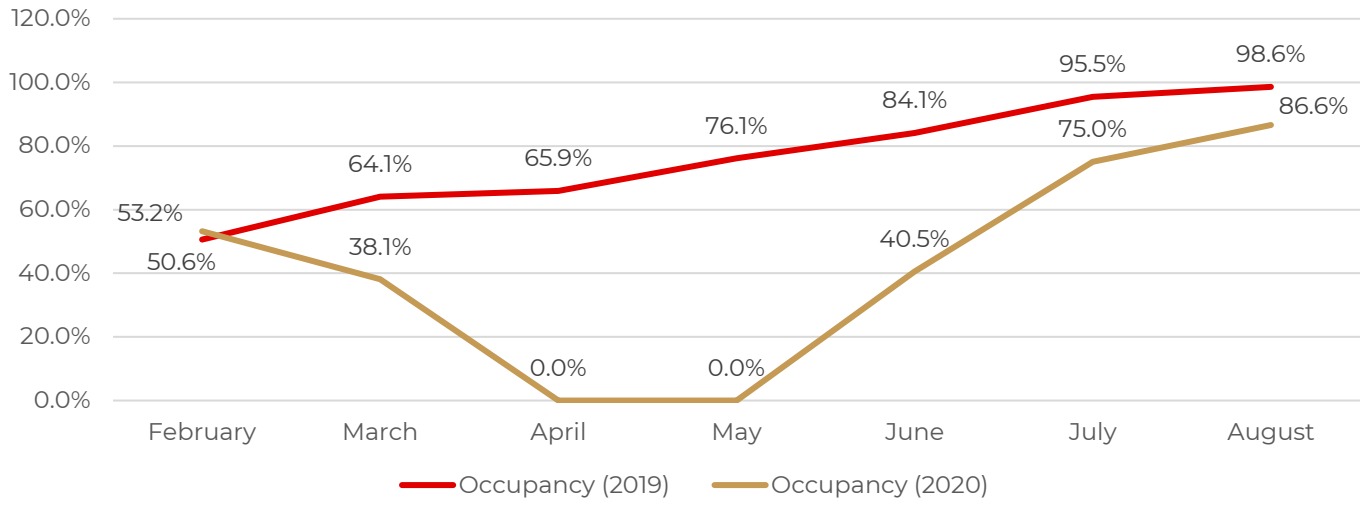
- Visitation to the Long Beach Unit of Pacific Rim National Park and traffic on Highway 4 are used as proxy measurements for estimating the number of tourists entering the region.
- Data for the short-term vacation rental market is assumed to indicate demand for tourist accommodation. Although this is only one part of the sector, there is no reliable and consistent recent data for hotel, motel, bed and breakfast, campground, and other accommodations in the region. It is assumed that the effects felt in the short-term vacation rental would be similarly experienced by other tourism accommodation providers.

4.2.1 RECENT TRENDS

The West Coast Region has long been recognized as a tourist destination. A 2019 report prepared for Tourism Tofino estimated that 4.4% of all tourism jobs on Vancouver Island were located within Tofino and that the District received 600,000 visitors in 2018.[26] Stakeholder interviews indicated that tourism remains strong and is increasing throughout the region. Occupancy data shows a dip from March to June 2020, when COVID-19 pandemic restrictions were put in place limiting travel, certain businesses, and physical proximity (**Figure 15**). However, stakeholders reported that by the summer, the tourism industry was as busy as ever, with most accommodations operating at 100% of their reduced capacities. Some stakeholders reported that the region was experiencing over-tourism as large numbers of BC residents turned to tourism destinations within their home province as a result of international travel restrictions. Real estate stakeholders reported that tourism accommodation and residential units with short-term rental suites are selling quickly.

[26] InterVISTAS Consulting Inc.

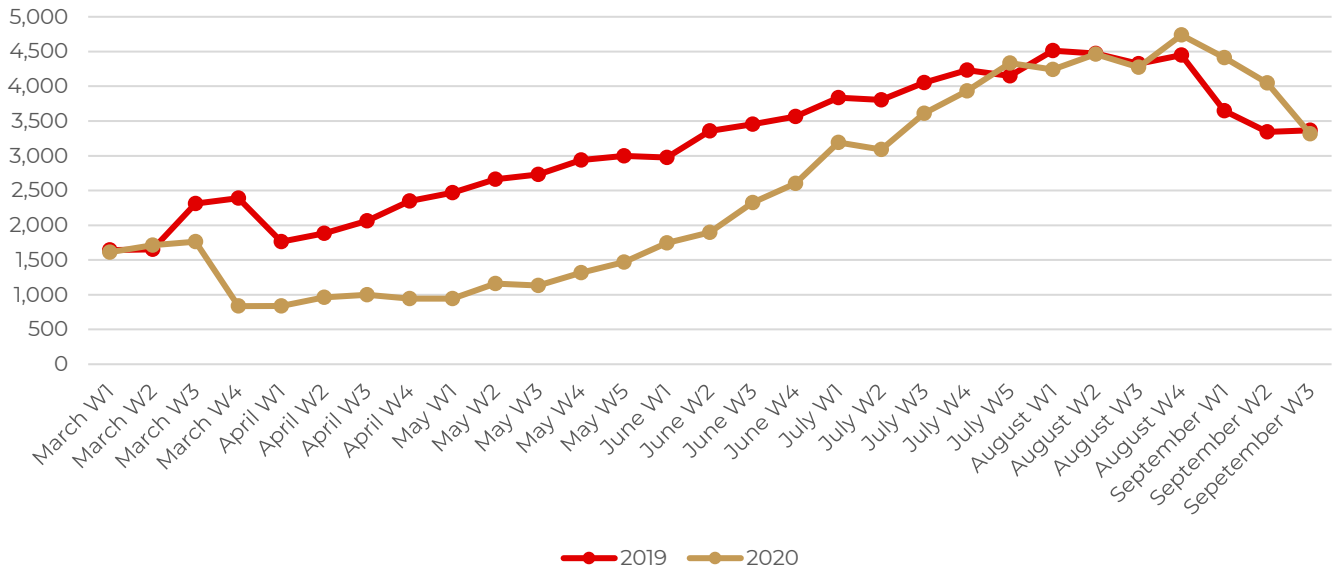
Figure 15: Resort Occupancy, West Coast Region, 2019 and 2020



Source: STR Ltd., via Tofino Industry News

Peak season traffic counts show a similar pattern (**Figure 16**). Before restrictions related to the COVID-19 pandemic were introduced, traffic travelling to the region was similar to 2019. Following restrictions, traffic dropped noticeably, before increasing to similar and higher than 2019 levels in the late summer. Many businesses were and continue to operate at reduced capacities to support physical distancing and stakeholders have reported over-tourism in summer and fall 2020. This suggests that tourism demand remains significant in the West Coast Region. Stakeholders from local economic development organizations, the tourism industry, and related sectors indicated they do not anticipate tourism demand will slow in the near future.

Figure 16: Average Weekday Traffic, Highway 4, 2019 and 2020



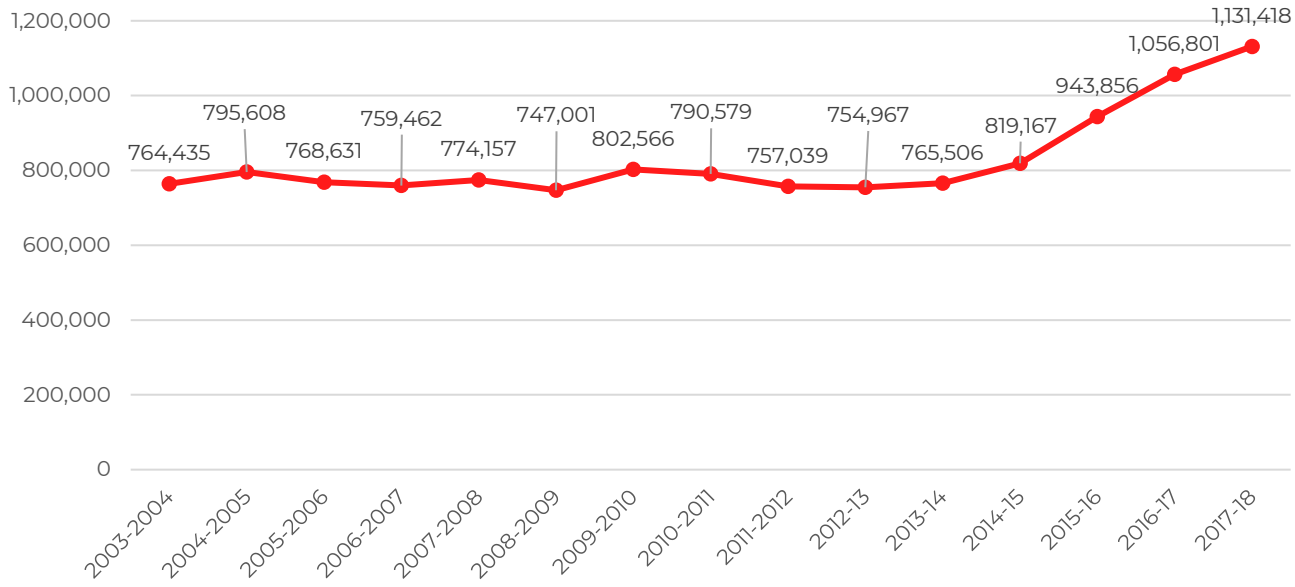
Source: Ministry of Transportation and Infrastructure, 2020

4.2.2 INDICATORS

Parks Visitation

The number of visitors to Pacific Rim National Park Reserve is often used to estimate the number of tourists visiting the West Coast Region. Park visitors have to pass through the study area to reach the park and as the only proximate communities, it can be assumed that most stop in Tofino, Ucluelet, and/or elsewhere in the region to access services. **Figure 17** shows the number of visitors to Long Beach in Pacific Rim National Park between 2003 and 2018. The number of visitors remained fairly stable until 2014, when began to increase rapidly. Between 2014 and 2018, there was a 38% increase in the number of visitations. This aligns with information provided by stakeholders, who reported noticing increases in tourism, real estate activity, commercial business, and related services over the past five years.

Figure 17: Visitors, Pacific Rim National Park Reserve (Long Beach), 2003 – 2018



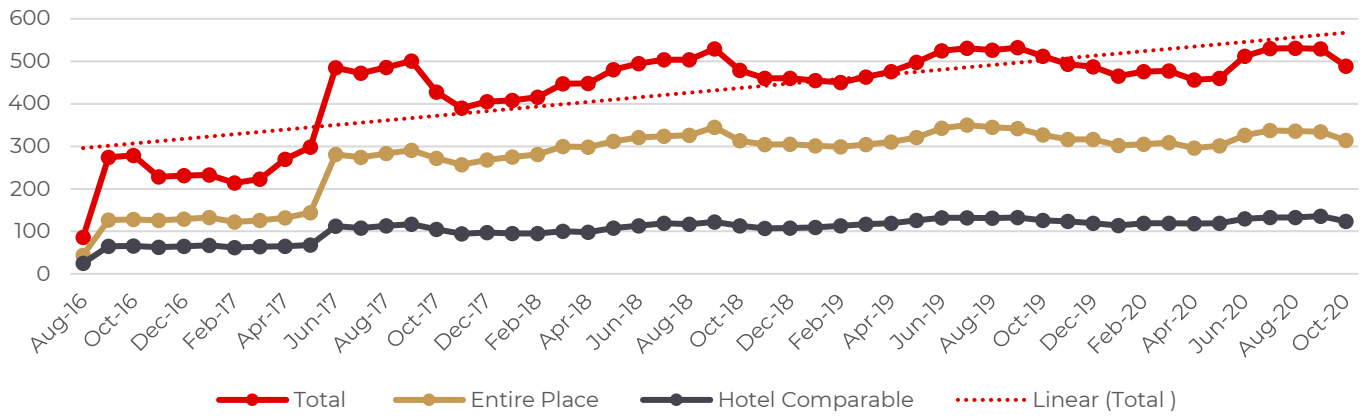
Source: Parks Canada, 2019

Short-Term Vacation Rental Supply

Data on the short-term vacation rental market has been accessed through AirDNA. AirDNA tracks variables for short-term vacation rental listings over time. This is some of the most recent available data that can be used to estimate past and future tourism demand in the West Coast Region. AirDNA scrapes data from Airbnb and Vacation Rental by Owner (VRBO) / HomeAway and cross-references listings to eliminate duplicates. The charts in this section present data for short-term rental listings that are entire dwelling units, as well as listings that are single rooms within a dwelling or accommodation business ("hotel comparable"). Single rooms are considered to be most comparable to hotel rooms, while entire dwellings are properties that may otherwise be used as residences such as secondary homes.

The number of short-term vacation rental listings in a community can suggest its popularity as a tourism destination. In both Tofino and Ucluelet, the number of short-term vacation rental listings has increased over the past four years. **Figure 18** and **Figure 19** show the total number of listings active (i.e., available for booking or booked) on short-term rental websites. **Figure 18** shows that listings in Tofino have trended upwards over the past four years, from 279 in October 2016 to 489 in October 2020, an increase of 75.2%. For comparison, the District of Tofino reported 441 bedrooms in 182 listings in October 2020.

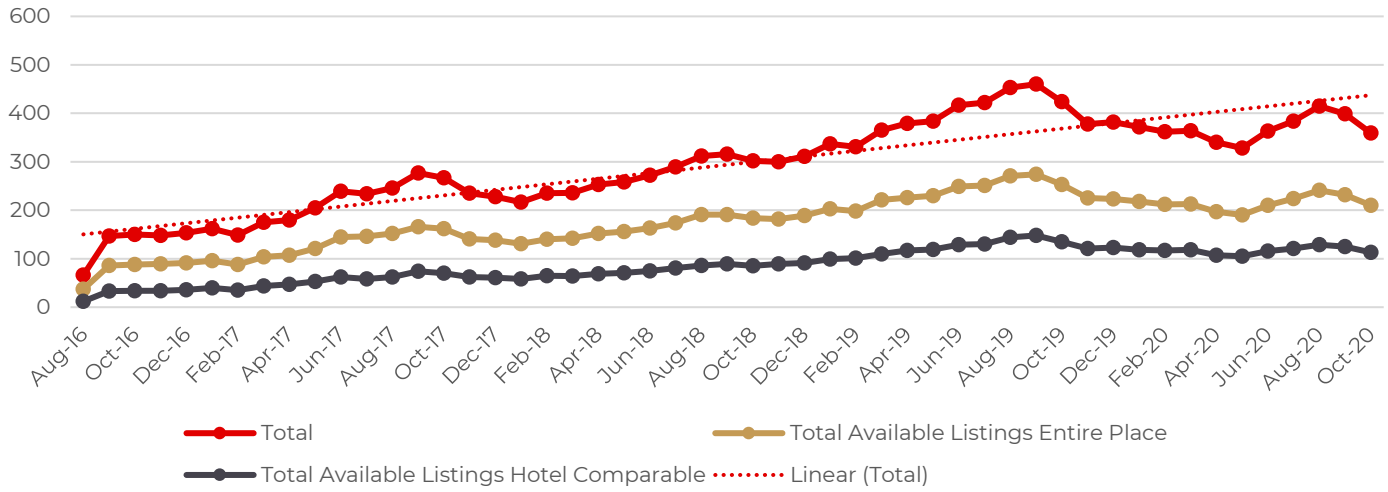
Figure 18: Number of Available Short-Term Vacation Rental Listings, Tofino, Quarterly 2016 – 2020



Source: AirDNA Market Summary Report, 2020

There are fewer listings available in Ucluelet, which aligns with stakeholder reports that trends in the region start in Tofino, then are felt in Ucluelet, then spread throughout the rest of the region. **Figure 19** shows that the listings in Ucluelet trended upwards from 150 in October 2016 to 359 in October 2020, an increase of 139.3%.

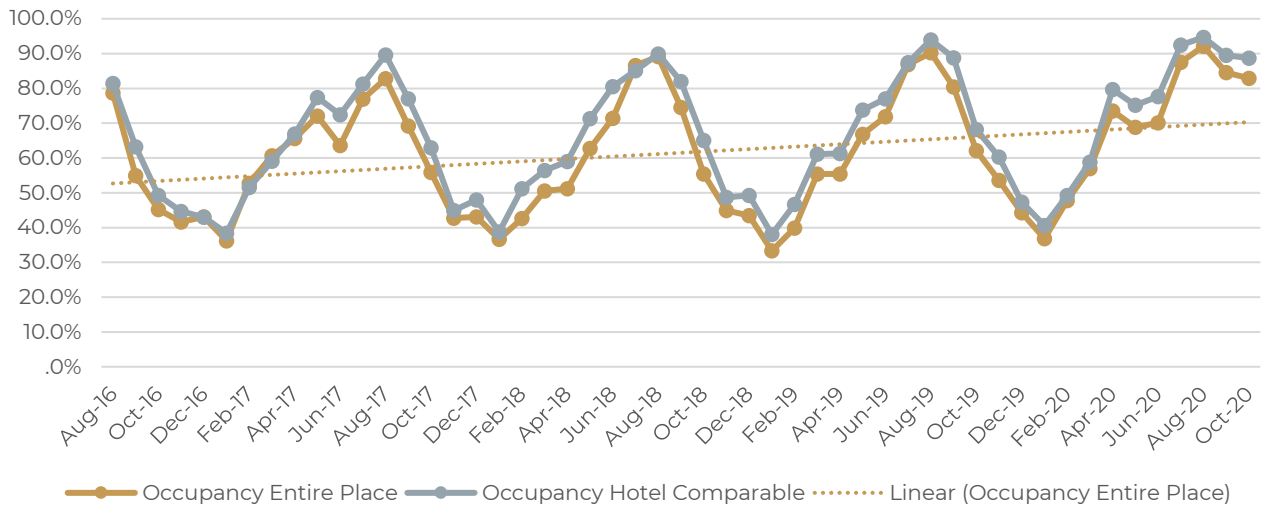
Figure 19: Number of Available Short-Term Vacation Rental Listings, Ucluelet, Quarterly 2016 – 2020



Source: AirDNA Market Summary Report, 2020

Occupancy rates are another indicator of tourism demand. Generally, occupancy rates close to 70% indicate there is demand for more space. Between 2016 and 2020, occupancy rates in Tofino trended between 81.4% and 91.4% for hotel comparable rooms, and 78.6% and 92.1% for entire place listings during peak season (**Figure 20**). The overall trend shows increasing occupancy, with the highest occupancy of the past four years seen in August 2020. Occupancy in October 2020 is much higher compared to October of previous years, which is likely related to effects of the COVID-19 pandemic.

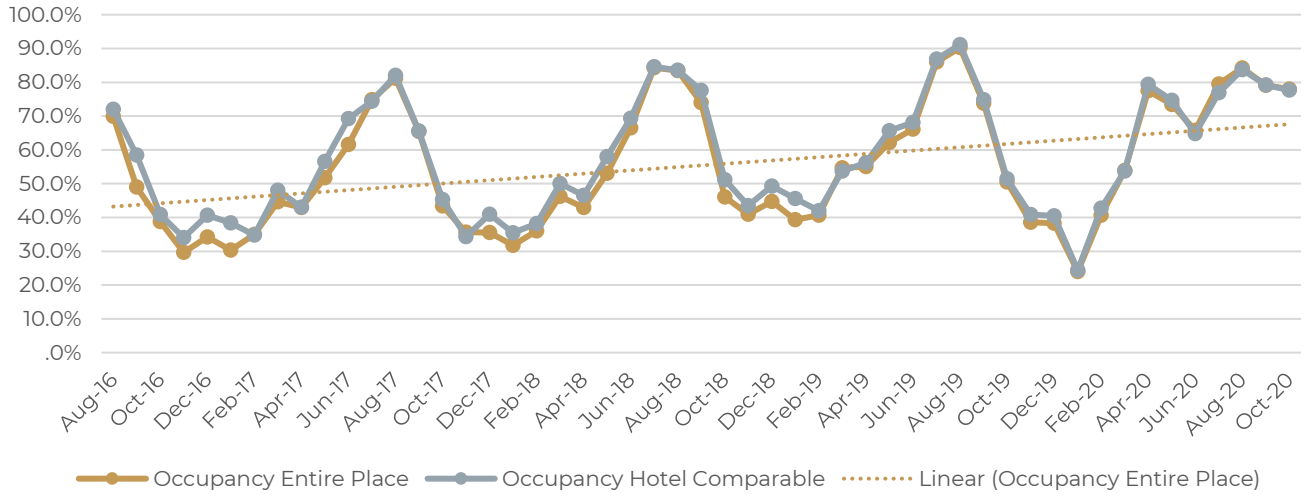
Figure 20: Occupancy Rates, Tofino, Quarterly 2016 – 2020



Source: AirDNA Market Summary Report, 2020

Between 2016 and 2020, occupancy rates in Ucluelet trended between 72.0% and 91.2% for hotel comparable rooms, and 70.0% and 90.3% for entire place listings during peak season (**Figure 21**). The overall trend shows increasing occupancy, with the highest occupancy of the past four years seen in August 2019. Occupancy in October 2020 is much higher compared to October of previous years, which is likely related to effects of the COVID-19 pandemic.

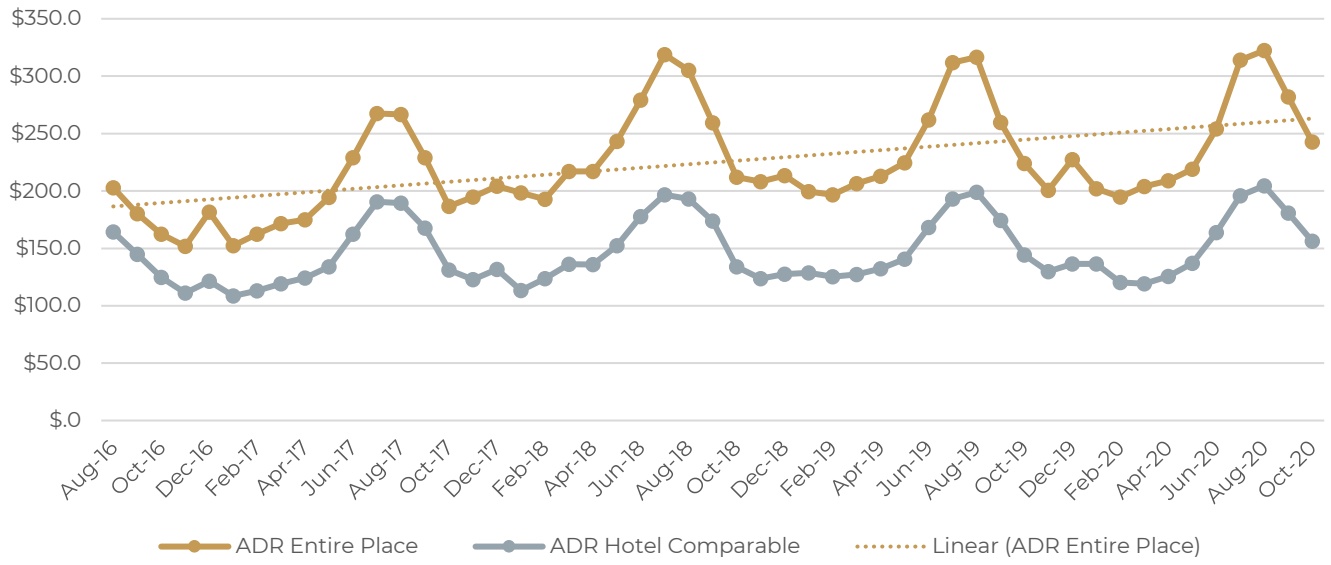
Figure 21: Occupancy Rates, Ucluelet, Quarterly 2016 – 2020



Source: AirDNA Market Summary Report, 2020

In Tofino, the rates charged by short-term vacation rental units has increased over the past four years. **Figure 22** shows that the average daily rate for entire place listings increased by 58.9% when comparing August 2016 to August 2020. In August 2020, the average rate for an entire place listing was $322,31, compared to $202.88 in August 2016. For hotel comparables, the average rate increased by 24.5%, reaching $204.57 per night in August 2020, compared to $164.28 in August 2016.

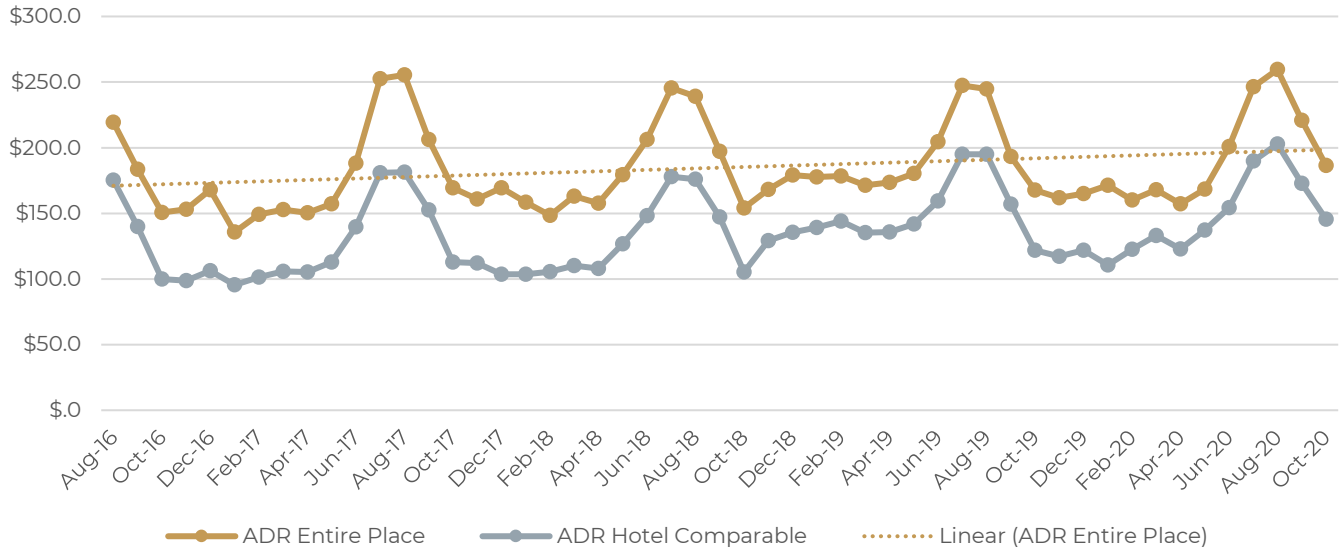
Figure 22: Average Daily Rates, Tofino, Quarterly 2016 – 2020



Source: AirDNA Market Summary Report, 2020

Figure 23 shows that prices have increased more modestly in Ucluelet, but, similar to Tofino, reached their highest rate in August 2020. The average daily rate for entire place listings increased by 18.3% when comparing August 2016 to August 2020. In August 2020, the average rate for an entire place listing was $259.56, compared to $219.36 in August 2016. For hotel comparables, the average rate increased by 15.7%, reaching $202.79 per night in August 2020, compared to $175.24 in August 2016.

Figure 23: Average Daily Rates, Ucluelet, Quarterly 2016 – 2020



Source: AirDNA Market Summary Report, 2020

An increasing number of listings, high occupancy rates, and increasing average daily rates all point towards strong tourism demand in the region. Although the long-term effects of the COVID-19 pandemic are uncertain, tourism demand in the West Coast Region appears to be sustained. Stakeholders interviewed predict that tourism demand will continue and that activates and development in the communities will become increasingly tourist driven.

Stakeholders reported demand for all tourism accommodation forms and scales, as accommodations were full, with some visitors sleeping in their cars because they were unable to find accommodation. Stakeholders reported demand remained strong through October for all types of accommodation, including campgrounds.

4.2.3 KEY TAKEAWAYS

- The West Coast Region has long been a tourism destination with increasing popularity, especially in the past few years.
- Despite the broader impacts of the COVID-19 pandemic on the travel and tourism industry, data collected from tourist accommodations and stakeholder interviews suggest that the effects were short-lived in Tofino and Ucluelet and that tourism accommodation demand remains strong.
- Stakeholders from local economic development organizations, the tourism industry, and related sectors indicated they do not anticipate tourism demand will slow in the future.
- Generally, an occupancy rate of 70% suggests their demand for more tourism accommodation spaces. In Tofino and Ucluelet, have ranged between 78.6% and 92.1% in Tofino and 70.0% and 91.2% in Ucluelet for short-term rental units. In both communities, the occupancy rate for October 2020 ranged from 77.7% to 82.9%, which is nearly double the occupancy rate seen during October in past years. This is likely related to the ongoing effects of the COVID-19 pandemic and associated travel restrictions.
- An increasing number of listings, high occupancy rates, and increasing average daily rates all point towards strong future demand in the region.

Based on these key takeaways the estimated demand for new tourist accommodation units over the next 30 years to 2050 is shown in **Table 13** below and estimated to be between 1391 and 6,784 new units.

Table 13: Estimated demand for new tourist accommodation units in the West Coast Region

GROWTH SCENARIO	NEW TOURIST COMMERCIAL UNITS		
	TOFINO	UCLUELET	TOTAL
Low	828	563	1,391
Medium	2,100	1427	3,527
High	4,038	2745	6,784

4.3 COMMERCIAL LAND USE DEMAND

Data in this section was gathered from the following sources:

- Stakeholder interviews
- Environics Study Area spending forecasts
- Environics population growth estimates
- Census and Environics labour force data and forecasts

4.3.1 COMMERCIAL DEMAND

For the purposes of this study, commercial use has been divided into four categories: food and beverage, retail commercial, service commercial, and office.

Service commercial space, which typically includes health and professional services, hair salons, pet stores, banks, and educational services often include office space for local businesses. In some instances, service commercial uses can also be found on land zoned for industrial use. Demand for new service commercial space is generally forecasted as a proportion of new retail space, so this analysis will begin with determining demand for new retail space.

Data in this section was gathered from the following sources:

- Stakeholder interviews
- Environics Study Area spending forecasts
- Environics population growth estimates
- Census and Environics labour force data and forecasts

4.3.2 RETAIL DEMAND ESTIMATES & ASSUMPTIONS

Demand for new retail space will be mostly driven by two broad growth factors:

- Growth in the local population, including changes in the average household incomes
- Growth in the numbers of tourists to the area, and the spending habits of tourists

Based on the Environics estimates of the Study Area population and household incomes, it is estimated that the Study Area resident population generated approximately $75.5 million of retail spending in 2018.

The 2019 report, *Economic Impact of Tourism in Tofino, B.C.,* estimated the total amount of tourism spending in Tofino. Tourism spending in Tofino in the retail and food and beverage categories was estimated to be $64.1 million in 2018.

There is no estimate of the total tourism spending in Ucluelet, which creates an important gap in the demand analysis. For this analysis, it has been estimated that tourism spending in the Study Area would increase by an additional 30% to 35% from the spending that has been captured in the *Economic Impact of Tourism in Tofino, B.C.* report.

To calculate future demand for retail space, another key assumption is the estimated growth of retail spending from tourists. For a base case scenario, it has been assumed that growth from tourism spending would track the growth in local resident spending.

There are other assumptions that could impact results, such as estimated average productivity rates for retail space in the Study Area, as well as the capture of spending from local residents. However, these assumptions have less of an impact on the total growth in demand for retail space than the assumptions regarding the growth rate of tourism spending, and the tourism spending in the region not accounted for in the 2019 report.

4.3.3 TOTAL COMMERCIAL DEMAND ESTIMATE

As mentioned previously, forecasts for service commercial demand are typically based as a proportion of demand for retail space. Currently in Tofino and Ucluelet, service commercial space is approximately 50% of retail space. In most communities, service commercial uses incorporate 20% to 30% of additional commercial space compared with pure retail space. Given the larger proportion of service commercial space in the Study Area, it is estimated that service commercial uses will entail an additional 35% of space beyond retail space.

Based on the assumptions listed above, and the low-growth population estimates from Environics, it is estimated that there will be demand for 170,000 sq. ft. of commercial space by 2050. The high-growth scenario would generate additional retail and commercial demand for 275,000 sq. ft. of new retail space. These estimates include both service commercial space and office space.

4.4 INDUSTRIAL LAND USE DEMAND

Calculating demand for industrial land is generally based on historical industrial development and estimates of whether trends will remain stable, slow, or increase. The small amount of industrial development in recent years makes this approach unsuitable for estimating future demand in the West Coast Region. Therefore, for this study, industrial market activity and labour force trends were reviewed to estimate future demand for industrial lands.

4.4.1 INDUSTRIAL MARKET ACTIVITY

Stakeholders interviewed indicated that, in recent years, there has not been significant industrial lands sales activity. In the past two years, there were only a couple reported sales of industrial land in both the Districts of Ucluelet and Tofino. One sale was Unit #1 at 671 Industrial Way in Tofino; it sold for approximately $417,000. The building was built in 2004 and the unit includes 2,000 sq. ft. of space. In Ucluelet some properties on Forbes Road have been sold recently, though price data is not available for these sales.

At the same time, stakeholders indicated that local entrepreneurs are interested in space for their ventures. This points to potential demand for small and flexible warehouse space. Demand for spaces suitable for smaller businesses would align with observed trends of people with a variety of work experiences moving to the region for lifestyle reasons and pursuing entrepreneurial opportunities.

4.4.2 LABOUR FORCE

At the time of the latest Census in 2016, there was a total labour force of approximately 2,650 living in the study area. For 2020, estimates suggest that the labour force is approximately 2,945 people.[27]

[27] Source: Projections prepared for the study area by Environics, 2020.

In 2016, residents of the West Coast Region most commonly reported working in the accommodation and food services sectors. This is expected based on the prominence of the tourism sector. **Table 14** provides a comparison of the top five industries for study area residents to B.C. residents overall.

Table 14: Top Five Industries for Residents (North American Industry Classifications), 2016

STUDY AREA		B.C. (FOR COMPARISON)	
Accommodation and food services	28%	Retail trade	11%
Retail trade	10%	Health care and social assistance	11%
Construction	7%	Accommodation and food services	8%
Agriculture, forestry, fishing, and hunting	6%	Construction	8%
Public administration	6%	Professional, scientific, and technical services	8%

Source: Statistics Canada - 2016 Census

Considering the high proportion of residents employed in tourism-related businesses, demand for new industrial lands would likely stem from businesses that support the tourism sector.

Table 15 shows the top five occupations for the study area compared with B.C. as a whole. Compared to the B.C. average, a large proportion of study area residents that work in management. This likely points to the number of entrepreneurs in the study area. It is possible that this trend could continue, as people continue to move to the region for lifestyle reasons and as working from home becomes more common as a result of the COVID-19 pandemic.

Table 15: Top Five Occupations for Residents, 2016

STUDY AREA		B.C. (FOR COMPARISON)	
Sales and Service	32%	Sales and Service	24%
Management	18%	Business, finance, and administration	16%
Trades, transport, equipment operators	12%	Trades, transport, equipment operators	14%
Business, finance, and administration	8%	Social science, education, government service	11%
Social science, education, government service	7%	Management	11%

Source: Statistics Canada - 2016 Census

Table 16 and **Table 17** show the commuting patterns of people working in Tofino and Ucluelet. In 2016, between 9% and 10% of workers in both Tofino and Ucluelet were commuting from Port Alberni. It should

be noted that although commuters from Tofino to Ucluelet are not shown in **Table 16**, it is suggested that there are several commuters travelling from Tofino to Ucluelet for work.

Table 16: Commuting to Work in Tofino, 2016

PLACE OF RESIDENCE	TOTAL	PROPORTION OF COMMUTERS
Tofino, DM	735	61.8%
Ucluelet, DM	145	12.2%
Alberni-Clayoquot C, RDA	110	9.2%
Port Alberni, CY	50	4.2%
Esowista 3, IRI	40	3.4%
Opitsaht 1, IRI	35	2.9%
Saltspring Island, RDA	30	2.5%
Nanaimo, CY	25	2.1%
Marktosis 15, IRI	20	1.7%
Total	**1,190**	**100%**

Source: Statistics Canada - 2016 Census

Table 17: Commuting to Work in Ucluelet, 2016

PLACE OF RESIDENCE	TOTAL	PROPORTION OF COMMUTERS
Ucluelet, DM	545	66.9%
Ittatsoo 1, IRI	100	12.3%
Port Alberni, CY	80	9.8%
Alberni-Clayoquot C, RDA	70	8.6%
Alberni-Clayoquot E, RDA	20	2.5%
Total	**815**	**100%**

Source: Statistics Canada - 2016 Census

4.4.3 DEMAND PROJECTIONS

Method

Demand for industrial lands has been estimated based on projected growth in labour force sectors that use industrial land.

By 2050, the population of the study area is projected to reach between 6,337 and 8,986. If the proportion of the population in the labour force remained constant from 2030, this would imply a labour force of between 3,380 and 4,765 workers.

New jobs in sectors such as manufacturing, wholesale trade, and waste management were considered the most likely to be located on industrial land. Other sectors such as transportation and warehousing, construction, and fishing, were considered to have a looser connection to industrial land. Other industry categories such as retail trade, accommodations, were considered to have a very slight relationship to demand for new industrial land. The number of new jobs likely for each of these sectors was projected by assuming the breakdown of jobs per industry categories remain constant.

A ratio of 6.3 jobs per acre was applied to the number of new jobs requiring industrial land, to project future demand for industrial land. The 6.3 jobs per acre is based on the average jobs per acre for industrial lands in Metro Vancouver.

Based on these assumptions, by 2050 there could be demand for approximately 10 to 40 new acres of industrial land. If an allowance for demand for industrial land beyond that driven by population growth is factored in (estimated by increasing demand by 25%), the study area could see demand for 15 to 50 new acres of industrial land.

It is important to note that this estimate of industrial land demand is only focused on demand deriving from population growth. There is the possibility that demand for industrial land might be generated by the success of a specific sector that is not tied to local population growth, such as the cannabis sector, clean technology, or manufacturing. Discussion of some of these industrial sectors follow in the section below.

4.4.4 ECONOMIC SECTORS TO DRIVE ADDITIONAL INDUSTRIAL LAND DEMAND

This section provides an overview of various economic sectors that could potentially exhibit demand for industrial land in both/either the immediate or medium term in the West Coast Region.

The West Coast Region is seeing an influx of new residents moving into the region for lifestyle reasons. These new residents are likely to be entrepreneurs with a varied skillset who will bring their work with them or start their own business. As such, industrial land may be needed to support local, small-scale businesses in the areas of manufacturing, specialty food processing, and clean technology. These subsectors are important areas where opportunities for diversifying the local economy exist.

Construction

The construction industry accounts for approximately 36% of jobs in the goods-producing sector on Vancouver Island (Vancouver Island Economic Alliance Report, 2019). Based on the interviews with stakeholders, construction timelines and costs are already impacted by the limited number of skilled tradespeople working in the Study Area. Based on the anticipated population growth and increase in households in the Tofino-Ucluelet Peninsula, demand for construction could increase to meet the housing needs of a growing population. If demand for the construction of new housing grows and development plans move forward, there will be a need for more localized construction activity and skilled construction workers. This will be a source of demand for industrial land.

Manufacturing

Manufacturing activities not related to forestry, minerals, or agri-food production include ship and boat building, equipment manufacturing, machine shops, and value-added wood manufacturing. Large-scale manufacturing operations are not expected in the Tofino-Ucluelet Peninsula. However, there may be opportunities for small-scale manufacturing to support the business ventures of entrepreneurs moving into the area. This includes activities such as furniture building and the production of goods for the tourism market and beyond.

Specialty Food Processing

Specialty food processing has ties to the continued diversification of the agricultural sector in the region. Province wide, the largest contributor to revenue generation in agriculture is the food and beverage processing industry subsector, followed by specialty agriculture and seafood. With the anticipated growth of the wine, distillery, craft brewing and specialty food sectors on Vancouver Island, there is potential for some of this growth to occur in the Tofino-Ucluelet Peninsula. Tofino-Ucluelet can capitalize on this growing subsector by creating food processing and agricultural innovation clusters.

Clean Technology

The technology sector is an integral part of the Province's economy contributing $14.6 billion to the GDP. The Province's Clean Energy Initiative provides opportunities for participation in the evolution of clean technology, including the development of new energy sources. Job growth in this sector exceeds the average employment growth on Vancouver Island where there are already a variety of tech firms working in digital technology, agri-tech, and applied technology. Opportunities for diversifying the local economy in Tofino-Ucluelet have been identified in the tech sector especially in regard to conservation. This may include the development of recycling or reuse-based businesses. The expansion of the clean technology sector in the Tofino-Ucluelet region can be aligned with sector growth opportunities in specialty food processing and small-scale manufacturing.

Aquaculture

Vancouver Island makes up a significant portion of the Province's aquaculture and fishing sector, which is an important contributor to the Island economy. In the Tofino-Ucluelet Peninsula, the existing aquaculture industry is comprised of two large fish companies with processing plants in Tofino along the waterfront with another seafood processing plant in Ucluelet. While this sector is not anticipated to grow, new ventures in this sector are possible. Opportunities for expanding aquaculture industry, would likely be dependent ensuring minimal or zero impacts to the local eco-systems and on the availability of industrial land necessary for the business.

Transportation / Warehousing / Storage

The growth of most industries inevitably involves the movement and storge of goods. Vancouver Island is well suited for transportation and warehousing infrastructure given the availability of underutilized land. With regards to the development of specialty food processing, land is needed for cold storage, micro-growing, greenhouses, and the distribution of goods locally and beyond. The demand for storage space will grow in Tofino and Ucluelet as more people relocate to the West Coast given that there is already a storage space shortage. Study Area residents are reportedly currently utilizing storage space in Port Alberni. The anticipated population growth and growth in local manufacturing activity may require the Tofino-Ucluelet Peninsula to increase the land dedicated to transportation and warehousing.

4.5 COVID-19 IMPACT ASSESSMENT

Data in this section was gathered from the following sources:

- Stakeholder interviews
- World Health Organization
- News outlets and journals (Canadian Geographic, The Conversation Canada, Canadian Broadcasting Corporation)

A key assumption affecting this section is that the COVID-19 pandemic is a recent occurrence and is ongoing; its effects are largely unknown to-date.

4.5.1 OVERVIEW

Across the globe, governments have taken measures to reduce physical interactions and keep people in their local communities, to reduce the spread of the COVID-19 virus.[28] This requires closing borders and businesses and asking people to stay at home as much as possible. These safety measures have resulted in international economic repercussions, causing various states of recession or depression across the globe. In BC, economic impacts to-date are reported to have been most strongly felt in tourism, accommodation, food services, recreation, transportation, retail, and similar service-based industries.

While it is still too early to have much data on the impacts of the COVID-19 pandemic, it has been suggested that throughout BC, there has been a shift in demand from condos and other attached dwellings in urban centres to single-detached dwellings in suburban, peri-urban, and rural areas. With large numbers of workers now working from home, the real estate industry has reported a trend of migration out of urban centres to desirable holiday or rural destinations across BC, including the West Coast of Vancouver Island. In Tofino and Ucluelet, this trend started when fibreoptic service was made available, and has only increased since the large-scale shift to working remotely brought on by the COVID-19 pandemic.

Tourism has also increased through the pandemic in Tofino and Ucluelet.[29] As international and even inter-provincial travel restrictions remain in place, BC residents have been turning to popular destinations within their province, such as Tofino and Ucluelet. Stakeholders reported that tourism services and accommodations are functioning as fully as they can within staffing constraints, enhanced sanitization protocols, and limited capacities. This has exacerbated existing needs for more staff housing for seasonal, tourism sector, and other workers. Stakeholders from the local business community indicated that some businesses do not have enough staff to keep up with demand all days of the week, so are closing on certain days in order to provide their staff with time off.

Real estate stakeholders indicated that demand for commercial spaces has increased as a result of increased tourism. In particular, it was suggested that demand for commercial / industrial services that support the tourism industry has increased, such as linen cleaning and distribution of hospitality goods. Real estate stakeholders also indicated that, while banks are reluctant to finance tourist accommodation purchases right now, there remains demand for these types of properties. All buyers are interested in having unit that can be rented on the short-term vacation rental market.

[28] https://www.who.int/emergencies/diseases/novel-coronavirus-2019
[29] See Section 2.2

COVID-19 pandemic has also had impacts on public realm planning and design, increasing demand for outdoor spaces to socialize in a safe manner, as transmission rates are reported to be much lower in outdoor environments. Throughout many communities, pop-up spaces to sit, relax, and meet friends and family in a physically distant manner have been installed to encourage safe interactions.[30]

4.5.2 SHORT AND MEDIUM-TERM IMPACTS

As the effects of the COVID-19 pandemic continue., stakeholders predict demand for single-detached homes will persist over the short and medium-term. Many employers have decided to permanently move their workforces to remote working arrangements, which has enabled many professional service workers to move away from urban areas like Victoria and Vancouver, to what were traditionally holiday or secondary-home locations like Tofino and Ucluelet.[31] Similar trends have been observed in communities in the Fraser Valley, Gulf Islands, Sunshine Coast, and more. With these markets relatively more affordable compared to Metro Vancouver and the Capital Regional District, newcomers can offer higher prices for homes, creating competition and driving prices up in the residential market. Stakeholders indicated this is exacerbating affordability challenges for young people who are already living in Tofino or Ucluelet but are looking to upsize as they have children.

The pandemic will likely continue to drive demand for single-detached homes for some time, which will increase demand for residential land in Tofino and Ucluelet.

Demand for public open spaces, which are well ventilated, well lit (natural or artificial), and sheltered from the elements is likely to persist through the short to medium term to allow for social interactions that feel safe. Regardless of when physical distancing requirements are lifted, experts predict it will take time for some people to feel comfortable socializing in close proximity indoors.[32]

[30] https://www.canadiangeographic.ca/article/how-canadian-cities-are-adapting-covid-19
[31]31https://www.cbc.ca/news/business/covid-economy-changes-1.5618734, https://biv.com/article/2020/05/rural-property-search-surges-bc-during-pandemic
[32] https://theconversation.com/cities-will-endure-but-urban-design-must-adapt-to-coronavirus-risks-and-fears-135949

5.0 GROWTH ESTIMATES & LAND USE MIX

This section provides an overview of current land use supply and potential growth scenarios in the West Coast Region. With current growth trends in the region projecting to increase demand for land and services acquiring a well-rounded understanding of current and future land use in the Districts of Ucluelet and Tofino, First Nation communities, and areas of the Alberni-Clayoquot Regional District (ACRD) is essential. Opportunities for new development are significant to providing adequate housing, employment opportunities, high-quality services, and tax revenues in the West Coast Region in the future.

This section analyzes the vacant and underutilized lands in each of these communities and create growth scenarios based on these available lands, infrastructure and servicing requirements, and the understanding of local stakeholders and Staff.

5.1 DEVELOPMENT SCENARIOS

Three growth scenarios were developed to estimate the development potential of identified vacant and underutilized lands in the participating communities within the next 30 years. Each scenario projects varying intensity of land use in vacant and underutilized lands in line with economic development objectives and land use opportunities identified by the Districts of Tofino and Ucluelet, ACRD, Tla-o-qui-aht, Toquaht, and Ucluelet First Nations.

These scenarios reflect possible development patterns of the projected land supply across the West Coast Region between District, Regional, and First Nation lands. The three development intensities used in these scenarios were classified as low, medium, and high growth. Using input from Staff of all participating community partners, an estimate of the highest and best uses of all vacant and underutilized lands was developed. Using the three growth scenarios, population equivalents were also developed, and will be used for the purposes of infrastructure planning in growth modelling presented later in the Study.

The appropriate uses, development intensities, and population equivalents were informed by local understanding and zoning bylaws in the participating communities to determine approximate site coverage, development height, and residential densities. Further, each scenario assumed that future development on previously undeveloped land could only occupy 65% of the land to allow for infrastructure requirements, steep slopes, and other potential site challenges. For sites that had previously been developed, it was assumed that 80% of the site could be used for development. A complete list and description of assumptions are provided in **Appendix A**.

5.2 SUMMARY OF VACANT & UNDERUTILIZED LANDS

This section summarizes the vacant and underutilized lands in the participating communities in the West Coast Region. Vacant and underutilized lands in each community were identified by Staff and used as the basis for the three development scenarios. The available land base widely varies by community, with some having set out clear intentions for land use and economic development on all vacant and underutilized lands, and others still undertaking analysis of possible land uses. Therefore, the level of detail available for vacant and underutilized lands differs by community. For the purposes of this study, the total underutilized and vacant land is summarized in **Table 18** below.

Table 18: Summary of identified vacant and underutilized lands in participating communities

COMMUNITY	TOTAL UNDERUTILIZED OR VACANT LANDS
District of Tofino	204.9 acres
District of Ucluelet	485.8 acres
Alberni-Clayoquot Regional District	292.4 acres
Tla-o-qui-aht First Nation	143.5 acres
Toquaht First Nation	60.5 acres
Ucluelet First Nation	79 acres

Figure 24: Vacant and Underutilized Lands in the District of Tofino and Tla-o-qui-aht First Nation.

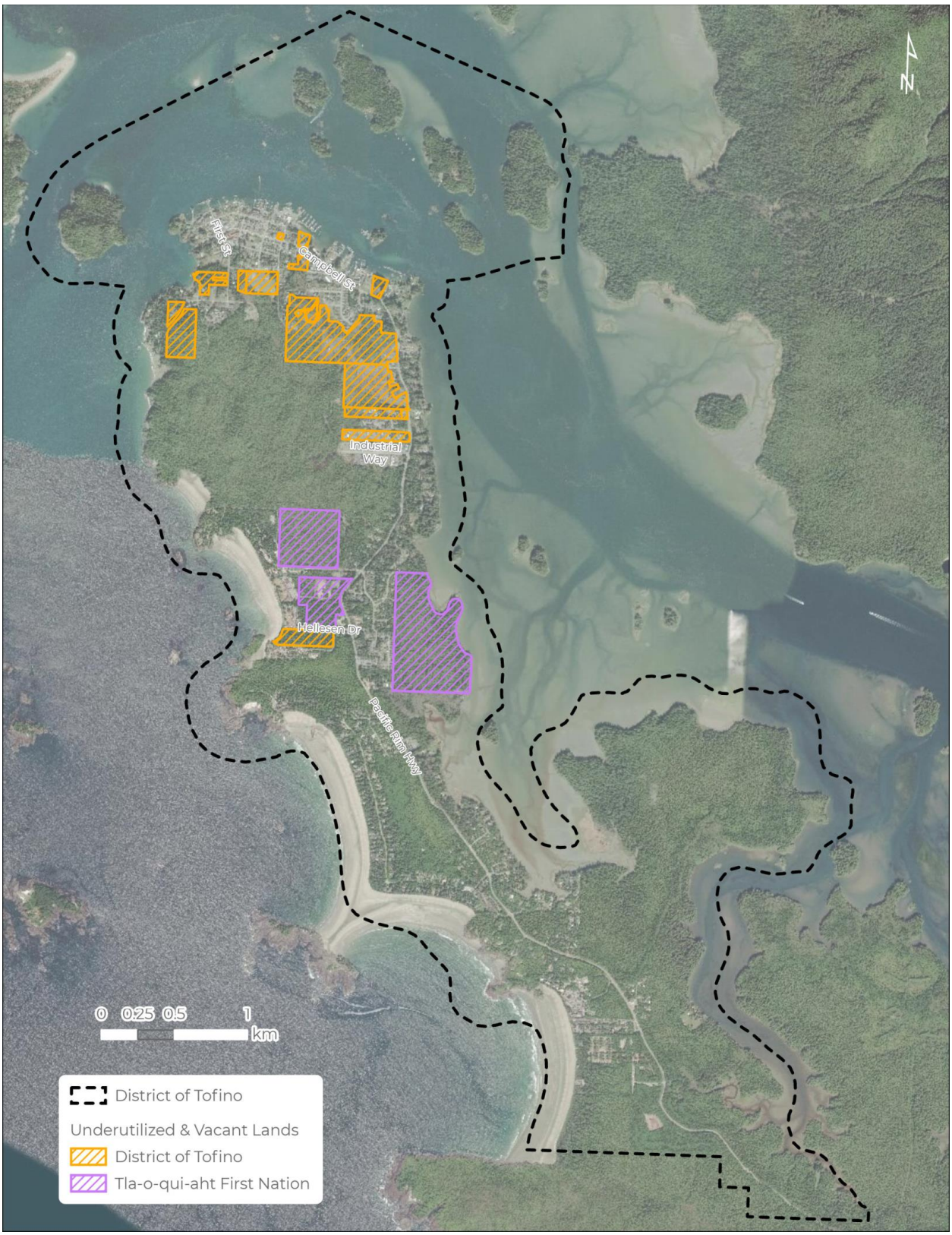


Figure 25: Vacant and Underutilized Lands around Tofino-Long Beach Airport

Figure 26: Vacant and Underutilized Lands in the District of Ucluelet.

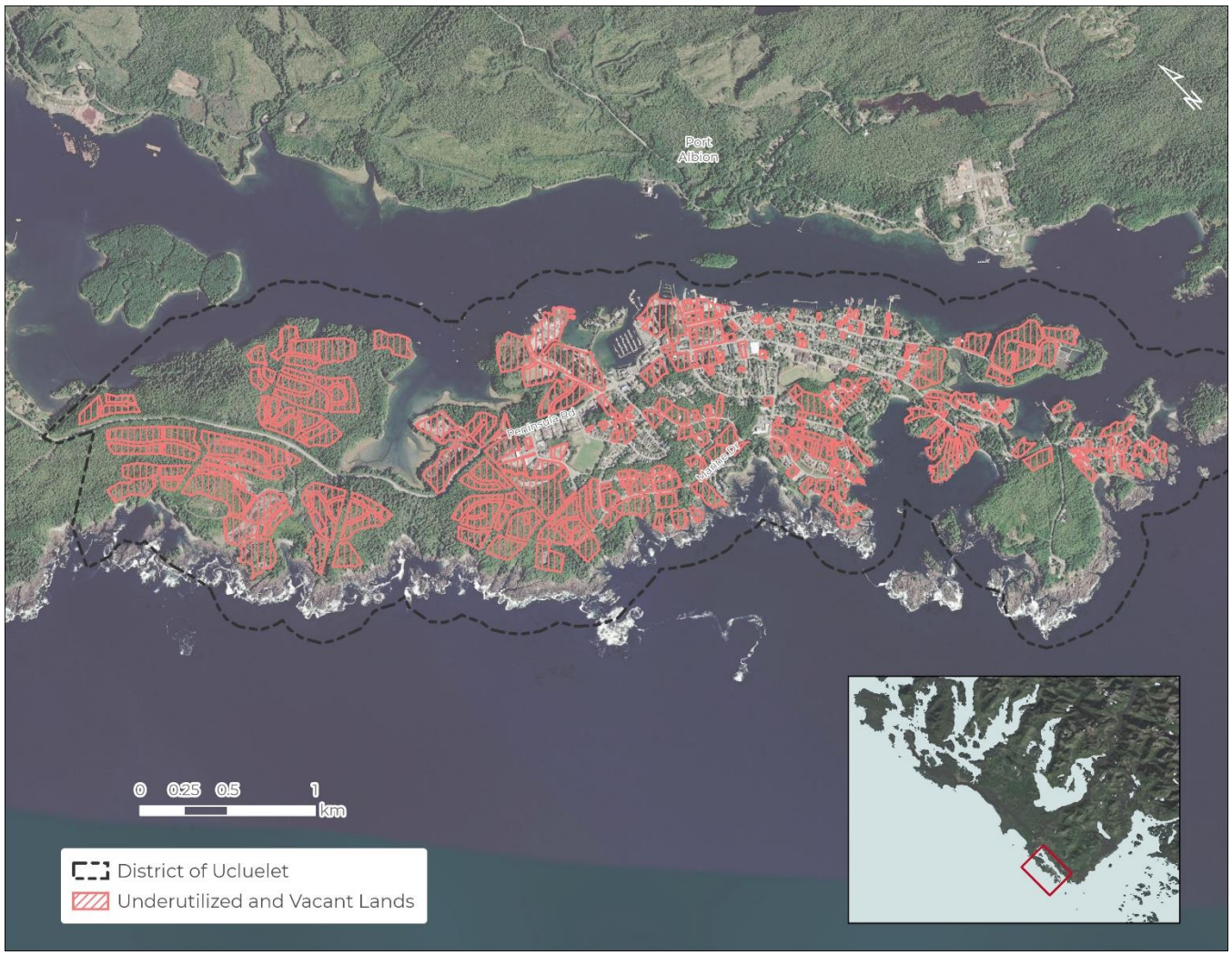
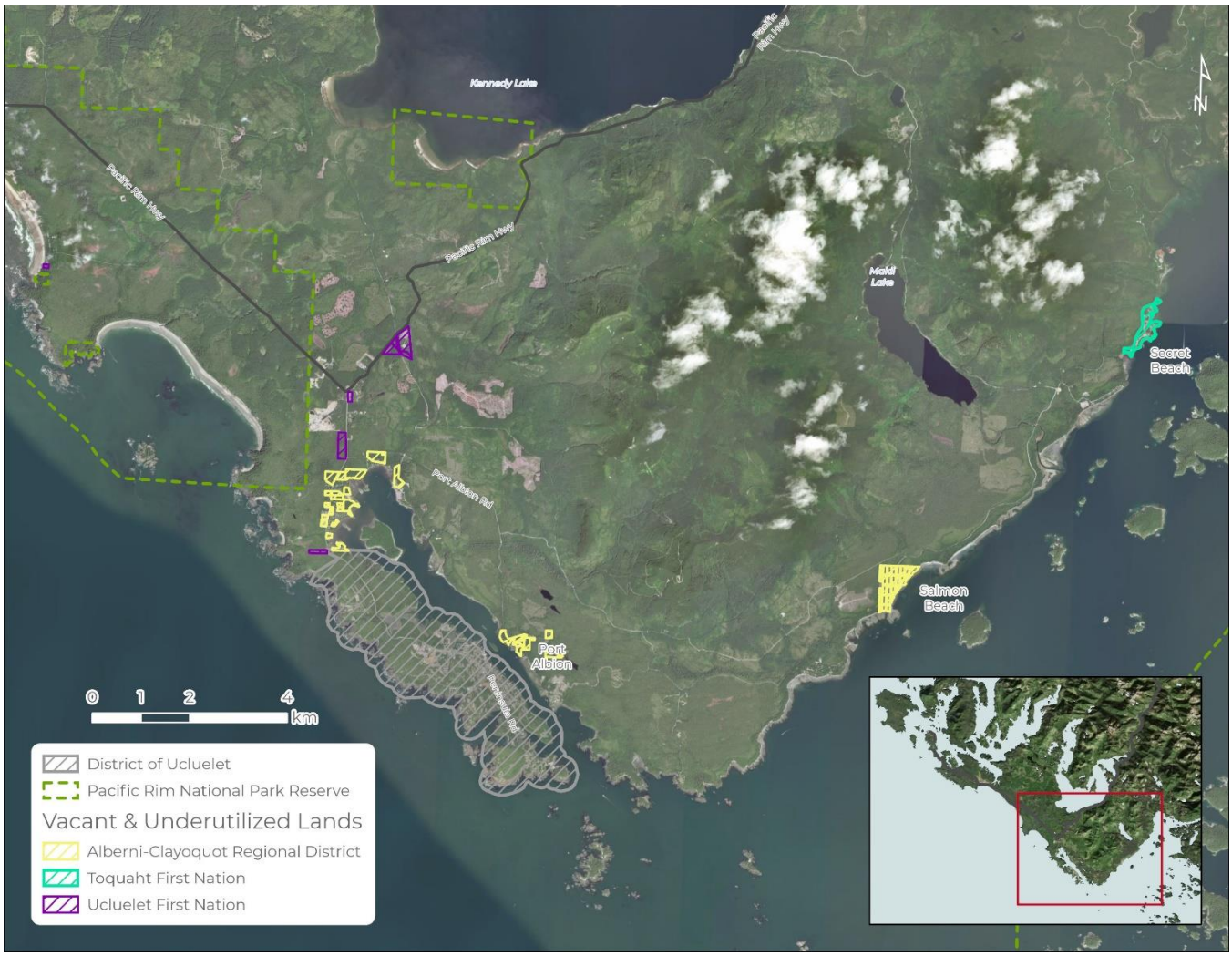


Figure 27: Vacant and Underutilized Lands in the Alberni-Clayoquot Regional District, Toquaht First Nation, and Ucluelet First Nation.



5.3 DEVELOPMENT SCENARIO RESULTS BY COMMUNITY

5.3.1 DISTRICT OF TOFINO

There is approximately 148 acres of underutilized and vacant lands in the District of Tofino available for development throughout the community. Many of these lands are located around the periphery of Tofino's Village Centre and along the Pacific Rim Highway to Industrial Way. Growth projected for the District will largely depend on local infrastructure capacity.

The lands considered for the purposes of this study are identified in **Figure 24** and the results of the three development scenarios are summarized in **Table 19** and **Table 20** below.

Table 19: Summary of development scenarios on vacant and underutilized lands, District of Tofino

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	764 units	540 units	370 units
Small Lot Single-Family	210 units	450 units	484 units
Townhouse	172 units	263 units	583 units
Multi-Family Residential	30 units	120 units	172 units
Tourism Commercial	199,110 sq. ft.	298,665 sq. ft.	298,665 sq. ft.
Commercial (Low-Density)	48,877 sq. ft.	135,402 sq. ft.	150,594 sq. ft.
Commercial (High-Density)	17,528 sq. ft.	26,292 sq. ft.	76,818 sq. ft.
Light Industrial	65,530 sq. ft.	151,102 sq. ft.	189,867 sq. ft.
Heavy Industrial	-	-	-
Industrial Park	129,216 sq. ft.	64,608 sq. ft.	-
Institutional	49,483 sq. ft.	58,089 sq. ft.	64,543 sq. ft.

Table 20: Summary of development scenario population equivalents, District of Tofino

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	1.401	952	755
Small Lot Single-Family	629	1,016	917
Townhouse	344	526	869
Multi-Family Residential	45	180	258
Tourism Commercial	223	334	334
Commercial (Low-Density)	41	113	126
Commercial (High-Density)	15	22	64
Light Industrial	55	126	159
Industrial Park	108	54	-
Institutional	23	27	30
Total	**2,883**	**3,350**	**3,513**

5.3.2 DISTRICT OF UCLUELET

The District of Ucluelet has more underutilized and vacant lands available for development than Tofino at approximately 486 acres. The northern areas of the community remaining largely undeveloped, and other lands with development potential interspersed throughout the District. This supply leads to greater levels of projected growth in the community compared to the development intensity estimated for Tofino, with a greater variety and intensity of residential, commercial, and industrial uses in the community.

The lands considered for the purposes of this study are identified in **Figure 26** and the results of the three development scenarios are summarized in **Table 21** and **Table 22** below.

Table 21: Summary of development scenarios on vacant and underutilized lands, District of Ucluelet

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	950 units	776 units	649 units
Small Lot Single-Family	613 units	757 units	796 units
Townhouse	650 units	725 units	783 units
Multi-Family Residential	397 units	833 units	1,338 units
Tourism Commercial	738,358 sq. ft.	1,018,687 sq. ft.	1,018,687 sq. ft.
Commercial (Low-Density)	254,537 sq. ft.	540,327 sq. ft.	571,581 sq. ft.
Commercial (High-Density)	341,294 sq. ft.	511,941 sq. ft.	511,941 sq. ft.
Light Industrial	335,619 sq. ft.	628,952 sq. ft.	736,164 sq. ft.
Heavy Industrial	-	-	-
Industrial Park	594,897 sq. ft.	505,554 sq. ft.	326,869 sq. ft.
Institutional	55,676 sq. ft.	74,235 sq. ft.	92,794 sq. ft.

Table 22: Summary of development scenario population equivalents, District of Ucluelet

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	2,850	2,329	1,946
Small Lot Single-Family	1,840	2,272	2,387
Townhouse	1,299	1,450	1,567
Multi-Family Residential	595	1,249	2,008
Tourism Commercial	826	1,140	1,140
Commercial (Low-Density)	213	452	478
Commercial (High-Density)	285	428	428
Light Industrial	281	526	616
Heavy Industrial	-	-	-
Industrial Park	497	423	273
Institutional	26	34	43
Total	**8,713**	**10,303**	**10,885**

5.3.3 ALBERNI-CLAYOQUOT REGIONAL DISTRICT

Available underutilized lands in the West Coast Region of the Alberni-Clayoquot Regional District, are primarily focused around four locations: Salmon Beach, Port Albion, Tofino-Long Beach Airport, and Millstream, north of Ucluelet, and comprise approximately 202 acres of land. In comparison to both Ucluelet and Tofino, the ACRD has abundant underutilized and vacant lands, however these lands are largely constrained by infrastructure and limited access to remote locations, and therefore have lower development potential than other lands considered through this Study.

The lands considered for the purposes of this study are identified in **Figure 25** and **Figure 27** and the results of the three development scenarios are summarized in **Table 23** and

Table 24 below.

Table 23: Summary of development scenarios on vacant and underutilized lands, Alberni-Clayoquot Regional District

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	42 units	89 units	148 units
Small Lot Single-Family	-	-	-
Townhouse	-	-	-
Multi-Family Residential	-	-	-
Tourism Commercial	-	-	-
Commercial (Low-Density)	-	15,992 sq. ft.	31,983 sq. ft.
Commercial (High-Density)	-	-	-
Light Industrial	458,262 sq. ft.	687,392 sq. ft.	916,523 sq. ft.
Heavy Industrial	35,404 sq. ft.	70,807 sq. ft.	106,211 sq. ft.
Industrial Park	-	-	-
Institutional	-	-	-

Table 24: Summary of development scenario population equivalents, Alberni-Clayoquot Regional District

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	127	268	443
Small Lot Single-Family	-	-	-
Townhouse	-	-	-
Multi-Family Residential	-	-	-
Tourism Commercial	-	-	-
Commercial (Low-Density)	-	13	27
Commercial (High-Density)	-	-	-
Light Industrial	383	575	766
Heavy Industrial	30	59	89
Industrial Park	-	-	-
Institutional	-	-	-
Total	**540**	**916**	**1,325**

5.3.4 TLA-O-QUI-AHT FIRST NATION

Tla-o-qui-aht First Nation holds several large parcels of land within the boundary of the District of Tofino, which represent most the Nation's vacant or underutilized land of approximately 144 acres. These lands include a portion of parcel containing the existing Tin Wis Resort, and nearby undeveloped economic development lands. The development on these lands could represent a substantial portion of the growth in the Tofino area over coming years, with these lands having the potential to support a mix of residential, tourism commercial, and low-density commercial uses.

The lands considered for the purposes of this study are identified in **Figure 24** and the results of the three development scenarios are summarized in **Table 25** and **Table 26** below.

Table 25: Summary of development scenarios on vacant and underutilized lands, Tla-o-qui-aht First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	538 units	412 units	265 units
Small Lot Single-Family	204 units	320 units	366 units
Townhouse	-	-	101 units
Multi-Family Residential	-	-	-
Tourism Commercial	229,115 sq. ft.	621,399 sq. ft.	899,126 sq. ft.
Commercial (Low-Density)	31,403 sq. ft.	62,806 sq. ft.	210,758 sq. ft.
Commercial (High-Density)	-	-	-
Light Industrial	-	-	-
Heavy Industrial	-	-	-
Industrial Park	-	-	-
Institutional	-	-	-

Table 26: Summary of development scenario population equivalents, Tla-o-qui-aht First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	1,615	1,236	796
Small Lot Single-Family	611	961	1,098
Townhouse	-	-	202
Multi-Family Residential	-	-	-
Tourism Commercial	256	696	1,006
Commercial (Low-Density)	26	53	176
Commercial (High-Density)	-	-	-
Light Industrial	-	-	-
Heavy Industrial	-	-	-
Industrial Park	-	-	-
Institutional	-	-	-
Total	**2,509**	**2,946**	**3,280**

5.3.5 TOQUAHT FIRST NATION

Toquaht Nation are focusing economic and land development around the primary community of Macoah and the Secret Beach site. The vacant and underutilized considered for this Study account for approximately 61 acres. Growth on these sites is projected to be limited within the regional context, however it will represent a substantial increase in land use intensities for the community, providing new opportunities for housing, commercial activity, and tourist accommodation on the west coast of Barkley Sound.

The lands considered for the purposes of this study are identified in **Figure 24** and the results of the development scenarios are summarized in **Table 27** and **Table 28** below.

Table 27: Summary of development scenarios on vacant and underutilized lands, Toquaht First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	88 units	150 units	250 units
Small Lot Single-Family	-	-	-
Townhouse	-	-	-
Multi-Family Residential	-	-	-
Tourism Commercial	17,868 sq. ft.	35,736 sq. ft.	53,604 sq. ft.
Commercial (Low-Density)	1,076 sq. ft.	2,153 sq. ft.	3,229 sq. ft.
Commercial (High-Density)	-	-	-
Light Industrial	-	-	-
Heavy Industrial	-	-	-
Industrial Park	-	-	-
Institutional	-	-	-

Table 28: Summary of development scenario population equivalents, Toquaht First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	264	450	750
Small Lot Single-Family	-	-	-
Townhouse	-	-	-
Multi-Family Residential	-	-	-
Tourism Commercial	20	40	60
Commercial (Low-Density)	1	2	3
Commercial (High-Density)	-	-	-
Light Industrial	-	-	-
Heavy Industrial	-	-	-
Industrial Park	-	-	-
Institutional	-	-	-
Total	**285**	**492**	**813**

5.3.6 UCLUELET FIRST NATION

Like many other communities in the Region, much of Ucluelet First Nation's underutilized and vacant lands are limited by available infrastructure and servicing. Development opportunities have therefore primarily been identified near or adjacent to existing infrastructure or in development forms requiring limited on-site servicing. Potential heavy industrial development on Ucluelet First Nation lands offers an opportunity that is limited in the other participating communities where industrial development is primarily focused on light industrial and industrial park uses.

The lands considered for the purposes of this study are identified in **Figure 25** and **Figure 27** and the results of the development scenarios are summarized in **Table 29** and

Table 30 below.

Table 29: Summary of development scenarios on vacant and underutilized lands, Ucluelet First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	-	20 units	40 units
Small Lot Single-Family	-	-	-
Townhouse	20 units	30 units	40 units
Multi-Family Residential	-	10 units	15 units
Tourism Commercial	35,736 sq. ft.	35,736 sq. ft.	35,736 sq. ft.
Commercial (Low-Density)	84,000 sq. ft.	87,767 sq. ft.	89,382 sq. ft.
Commercial (High-Density)	-	-	-
Light Industrial	-	-	-
Heavy Industrial	28,314 sq. ft.	56,628 sq. ft.	84,942 sq. ft.
Industrial Park	-	-	-
Institutional	-	-	-

Table 30: Summary of development scenario population equivalents, Ucluelet First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	-	60	120
Small Lot Single-Family	-	-	-
Townhouse	40	60	80
Multi-Family Residential	-	15	23
Tourism Commercial	40	40	40
Commercial (Low-Density)	70	73	75
Commercial (High-Density)	-	-	-
Light Industrial	-	-	-
Heavy Industrial	71	142	213
Industrial Park	-	-	-
Institutional	-	-	-
Total	**221**	**390**	**550**

5.3.7 HESQUIAHT FIRST NATION

Development on Hesquiaht First Nation's underutilized and vacant lands are unique to the context of the communities participating in this study. The remote location of Hesquiaht lands means that development opportunities will rely on local infrastructure solutions. The Nation's development objectives are primarily to expand on-reserve housing options, expand existing tourism commercial operations, and to provide local opportunities for natural resource processing, including an ice plant on Nation land.

The results of the three development scenarios on the lands considered for this study are summarized in **Table 31** and **Table 32** below.

Table 31: Summary of development scenarios on vacant and underutilized lands, Hesquiaht First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	50 units	100 units	150 units
Small Lot Single-Family	-	-	-
Townhouse	-	-	-
Multi-Family Residential	-	-	-
Tourism Commercial	8,934 sq. ft.	13,401 sq. ft.	17,868 sq. ft.
Commercial (Low-Density)	-	-	-
Commercial (High-Density)	-	-	-
Light Industrial	2,153 sq. ft.	2,153 sq. ft.	2,153 sq. ft.
Heavy Industrial	-	-	-
Industrial Park	-	-	-
Institutional	-	-	-

Table 32: Summary of development scenario population equivalents, Hesquiaht First Nation

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	150	300	450
Small Lot Single-Family	-	-	-
Townhouse	-	-	-
Multi-Family Residential	-	-	-
Tourism Commercial	10	15	20
Commercial (Low-Density)	-	-	-
Commercial (High-Density)	-	-	-
Light Industrial	2	2	2
Heavy Industrial	-	-	-
Industrial Park	-	-	-
Institutional	-	-	-
Total	**162**	**317**	**472**

5.4 REGIONAL SUMMARY OF SUPPLY SCENARIOS

Based on the three development scenarios created for this Study, growth on vacant and underutilized lands could substantially increase the intensity of land uses across the West Coast Region. Several trends hold across the scenarios, with increased density in small-lot single-family, townhouse, and multi-family development corresponding to a decreasing number of large-lot single family uses. Tourism commercial and light industrial uses both rapidly increase in density between the low and high scenarios and are the largest commercial and industrial growth areas across all three scenarios. Industrial park uses are the only commercial or industrial use to decline between the low and high scenarios due to more land being dedicated to light industrial development. Overall, the three scenarios projected the total growth in the West Coast Region as follows, with full results shown in **Table 33** and

Table 34.

Low Scenario

4,431 additional residential units and 3,762,389 sq. ft. of commercial, industrial, and institutional development, resulting in the equivalent of 15,266 new people.

Medium Scenario

5,262 additional residential units and 5,705,825 sq. ft. of commercial, industrial, and institutional development, resulting in the equivalent of 18,619 new people.

High Scenario

6,106 additional residential units and 6,490,038 sq. ft. of commercial, industrial, and institutional development, resulting in the equivalent of 20,695 new people.

Table 33: Summary of development scenarios on vacant and underutilized lands for the West Coast Region

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	2,136 units	1,865 units	1,754 units
Small Lot Single-Family	1,027 units	1,416 units	1,467 units
Townhouse	842 units	1,018 units	1,359 units
Multi-Family Residential	427 units	963 units	1,526 units
Tourism Commercial	1,229,121 sq. ft.	2,023,625 sq. ft.	2,323,687 sq. ft.
Commercial (Low-Density)	419,893 sq. ft.	844,446 sq. ft.	1,057,527 sq. ft.
Commercial (High-Density)	358,822 sq. ft.	538,233 sq. ft.	588,759 sq. ft.
Light Industrial	861,563 sq. ft.	1,469,600 sq. ft.	1,844,706 sq. ft.
Heavy Industrial	63,718 sq. ft.	127,435 sq. ft.	191,153 sq. ft.
Industrial Park	724,113 sq. ft.	570,162 sq. ft.	326,869 sq. ft.

Institutional	105,159 sq. ft.	132,324 sq. ft.	157,337 sq. ft.

Table 34: Summary of development scenario population equivalents for the West Coast Region

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	6,408	5,596	5,261
Small Lot Single-Family	3,080	4,249	4,402
Townhouse	1,683	2,035	2,718
Multi-Family Residential	640	1,444	2,289
Tourism Commercial	1,376	2,265	2,601
Commercial (Low-Density)	351	706	884
Commercial (High-Density)	300	450	492
Light Industrial	720	1,229	1,542
Heavy Industrial	53	107	160
Industrial Park	605	477	273
Institutional	49	61	73
Total	**15,266**	**18,619**	**20,695**

6.0 KEY COMMERCIAL AND INDUSTRIAL SITES

Based on an analysis of vacant and underutilized lands in the study area, 14 key sites were identified. For each site, the growth potential was projected based on low, medium, and high growth and according to what kind of development is most suitable for the location/site.

6.1 DISTRICT OF TOFINO

6.1.1 CAMPBELL ROAD PROPERTY

This small site (see **Figure 28**) centrally located in the District of Tofino, includes opportunities for light industrial development with office above the ground level along Tofino's downtown waterfront. The site is zoned Light Industrial District (M2) and is serviced by municipal water and sewer systems with direct access from Campbell Rd (see **Table 35**). Light industrial uses that would benefit from close proximity to the ocean, or that would benefit from exposure to tourists, would work well at this location.

Table 35: Campbell Road Property – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
1.7 acres (0.7 ha)	Adjacent to municipal water and sanitary sewer servicing	Light Industrial: 20,304 sq. ft.	Light Industrial: 34,808 sq. ft.	Light Industrial: 34,808 sq. ft.

Figure 28: Campbell Road Property – Site Map

6.1.2 INDUSTRIAL WAY NORTH

Located to the north of Industrial Way (see **Figure 29**) these existing industrial lands could be intensified to meet demand for light industrial and business park development. The site consists of three parcels zoned Light Industrial District (M2), which are all serviced by municipal water and sewer infrastructure. This is a key expansion area for light industrial uses in Tofino (see **Table 36**). Light manufacturing businesses owned by local residents are likely to be interested in leasing finished industrial space at this location.

Table 36 Industrial Way North – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
7.4 acres (3.0 ha)	Adjacent to municipal water and sanitary sewer servicing	Light Industrial: 45,226 sq. ft. Industrial Park: 129,216 sq. ft.	Light Industrial: 116,294 sq. ft. Industrial Park: 64,608 sq. ft.	Light Industrial: 155,054 sq. ft.

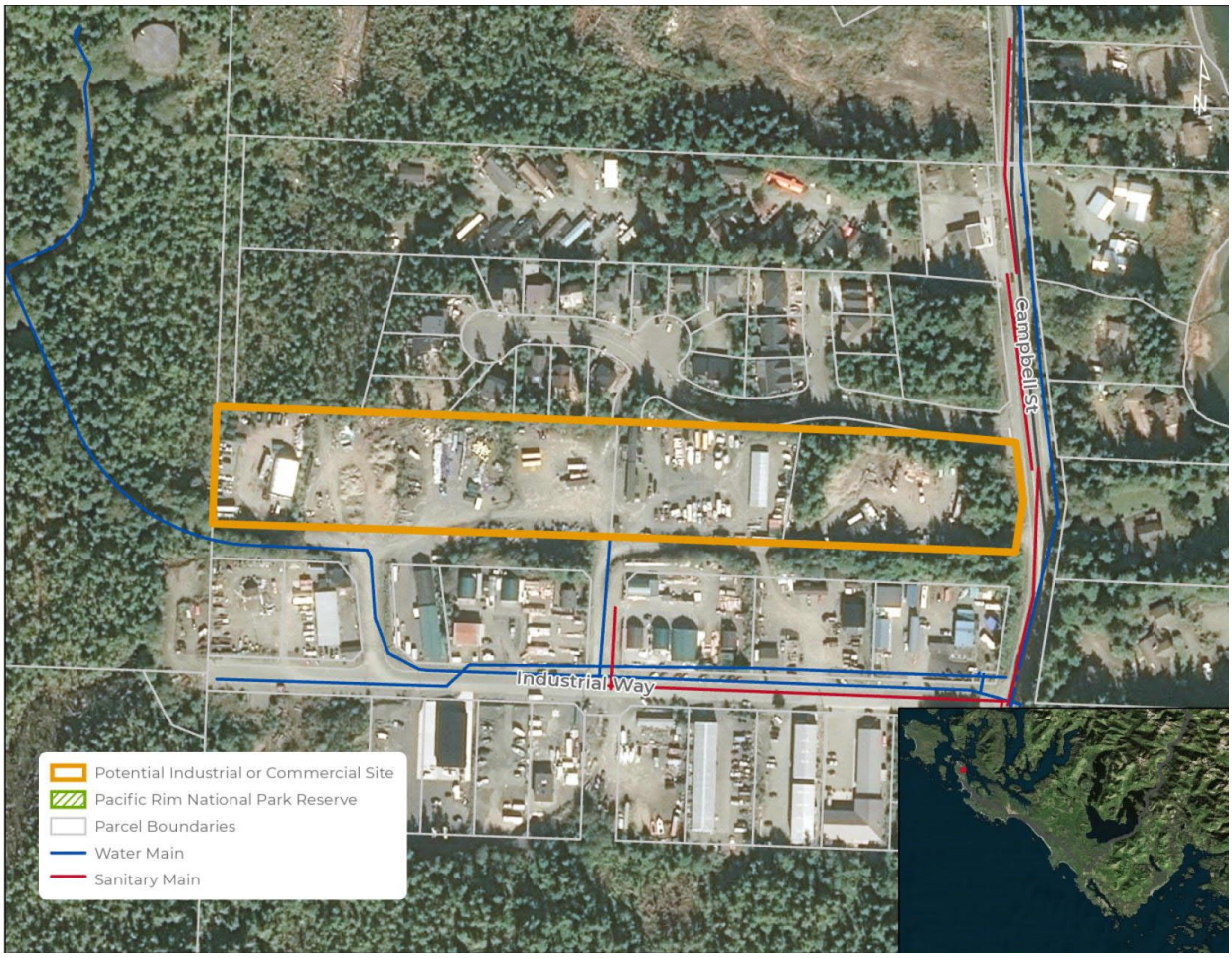


Figure 29: Industrial Way North – Site Map

6.1.3 HELLESEN DRIVE PROPERTY

Given the demand for tourism accommodation in the municipality and the region, this site is a unique opportunity to expand tourism commercial supply in Tofino. Located on Hellesen Drive off Highway 4, the site fronts Mackenzie Beach between existing resort development at the Ocean Village Resort and Crystal Cove Beach Resort (see **Figure 30**). Currently vacant, the site is zoned Tourist Commercial (C5) and is serviced by the municipal water system (see **Table 37**).

The Hellesen Drive Property is currently the subject of a development application.

Table 37: Hellesen Drive Property – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
10.0 acres (4.1 hectares)	Adjacent to municipal water servicing No sanitary sewer servicing	Tourism Commercial: 199,111 sq. ft.	Tourism Commercial: 298,665 sq. ft.	Tourism Commercial: 298,665 sq. ft

Figure 30: Hellesen Drive Property – Site Map

6.2 DISTRICT OF UCLUELET

6.2.1 FORBES ROAD PROPERTIES

Forbes Road Properties

These lands, consisting of three properties near Forbes Road, are designated for future industrial development. The Forbes Road site is a possible area for expansion or intensification of neighbouring industrial uses. The properties are zoned for Eco-Industrial Park (CD-1) and are serviced by municipal water and sanitary sewer infrastructure. Light industrial development at the site will benefit from the existing light industrial uses already in the area, as well as additional vacant lands on Peninsula Road. This area could become an employment hub for the region. The site is approximately 14.7 acres in areas, however, the presence of wetland habitat in the area reduces the developable area to approximately 9 acres once environmental constraints are considered.

Table 38: Forbes Road Properties – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
9 acres (3.6 ha)	Adjacent to municipal water and sanitary sewer servicing	Light Industrial: 179,269 sq. ft.	Light Industrial: 307,319 sq. ft.	Light Industrial: 307,319 sq. ft.

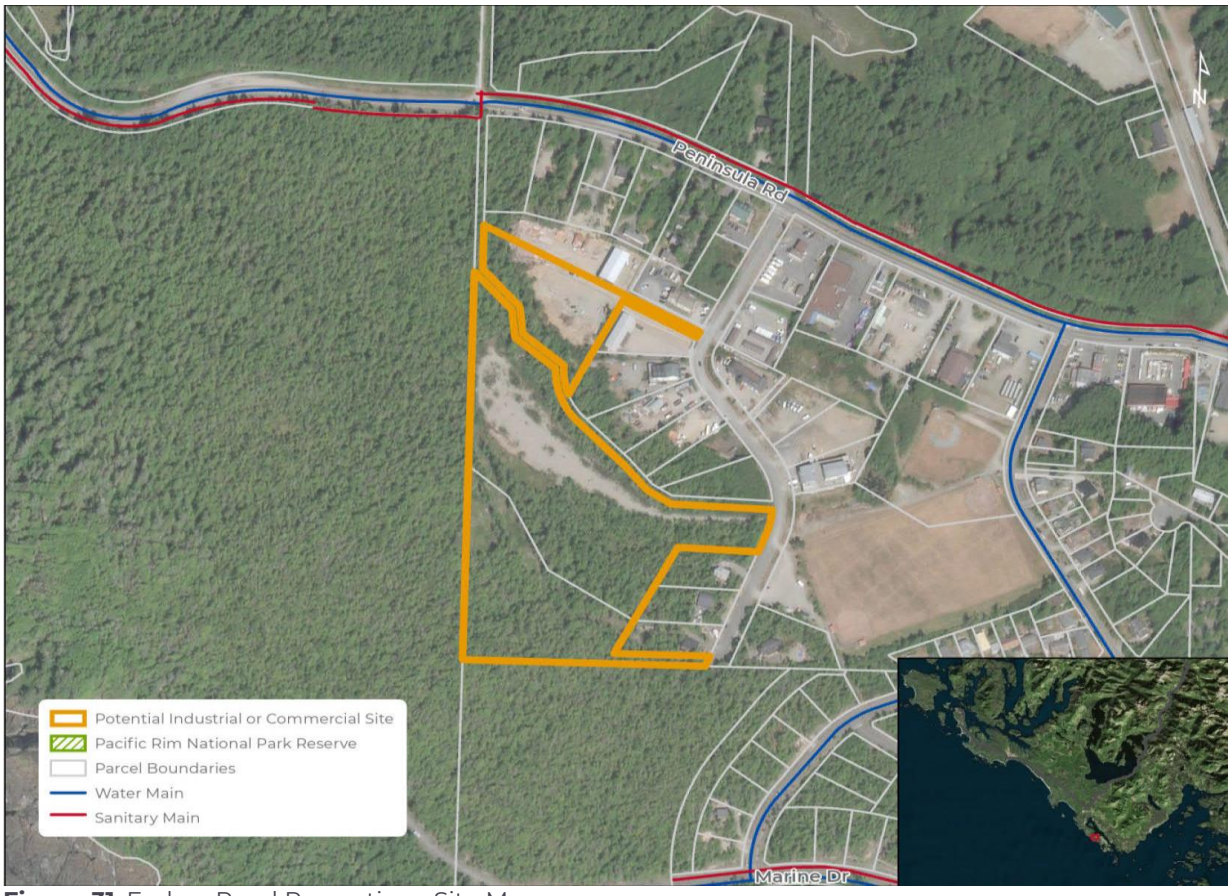


Figure 31: Forbes Road Properties – Site Map

6.2.2 MARINE DRIVE PROPERTY

The Marine Drive Property is a vacant parcel located along Marine Drive in Ucluelet (see **Figure 32**). The site is adjacent to the Black Rock Resort and is a potential opportunity to increase tourist accommodation supply in the District of Ucluelet along the municipality's scenic coastline. The Marine Drive Property is zoned as part of the Former Weyco Forest Lands (CD-5) and is serviced by municipal water and sanitary sewer infrastructure (see **Table 39**). The Black Rock Resort is currently reviewing an expansion on this lot of 30 rooms or 46,000 sq. ft. for phase one, with the potential for future second phase of equal size.

Table 39: Marine Drive Property – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
3.4 acres (1.4 ha)	Adjacent to municipal water and sanitary sewer servicing	Tourism Commercial: 92,000 sq. ft.	Tourism Commercial: 92,000 sq. ft.	Tourism Commercial: 125,151 sq. ft.

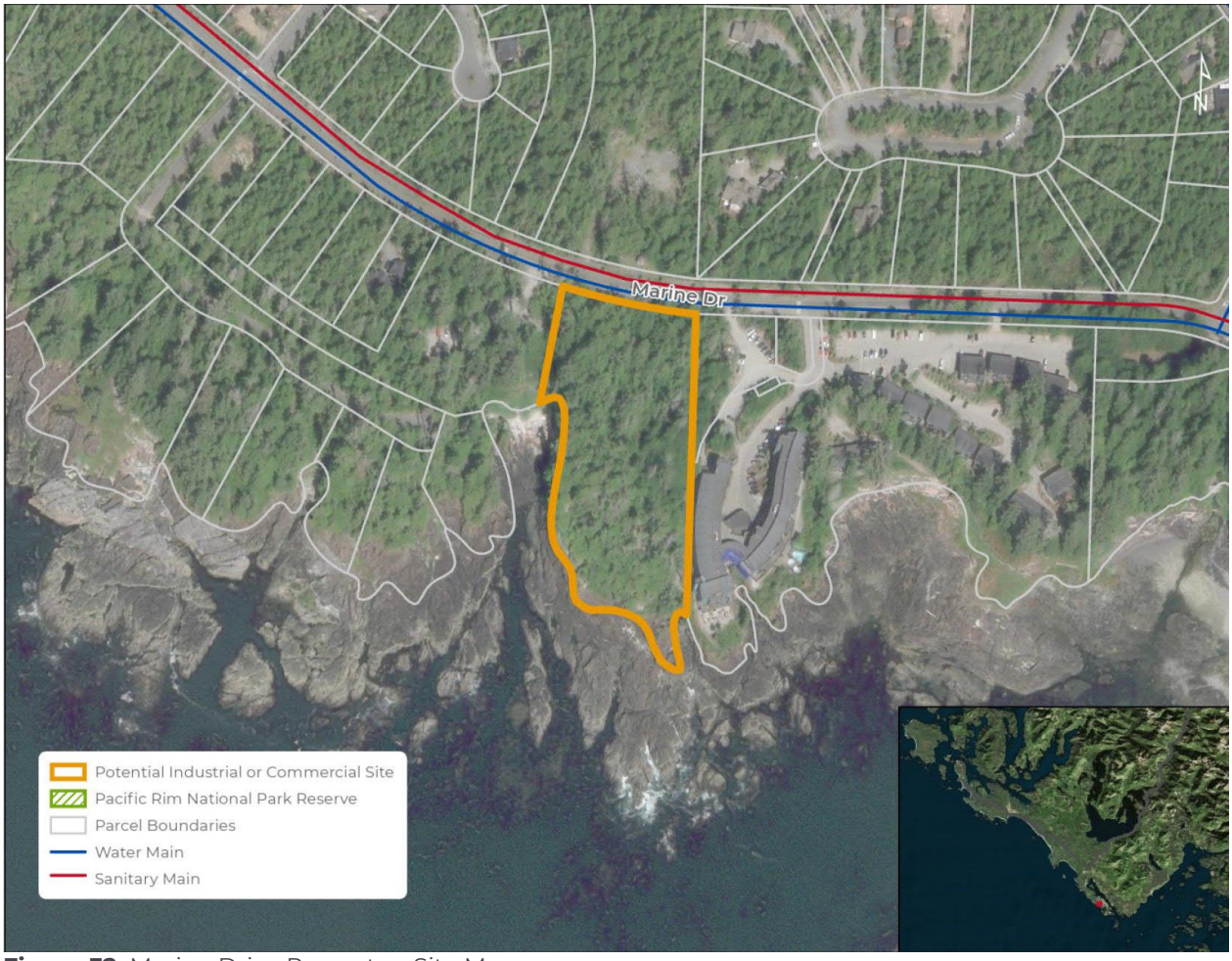


Figure 32: Marine Drive Property – Site Map

6.2.3 PENINSULA ROAD PROPERTIES

This collection of seven properties, located along Peninsula Road in Ucluelet, are zoned for Service Commercial (CS-2) which creates potential for a variety of low-intensity commercial development in the area. The Peninsula Road properties are well located along a high-traffic route and are serviced by municipal water and sanitary sewer infrastructure (see **Table 40** and **Figure 33**).

Service commercial or light industrial uses would be well suited to this location. Adjacent uses include small-scale manufacturing, storage, and service commercial, presenting the opportunity to create a larger employment hub with the development of these and other vacant sites nearby on Forbes Road.

Table 40: Peninsula Road Properties – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
5.4 acres (2.2 ha)	Adjacent to municipal water and sanitary sewer servicing	Low-Density Commercial: 93,508 sq. ft.	Low-Density Commercial: 187,016 sq. ft.	Low-Density Commercial: 187,016 sq. ft.

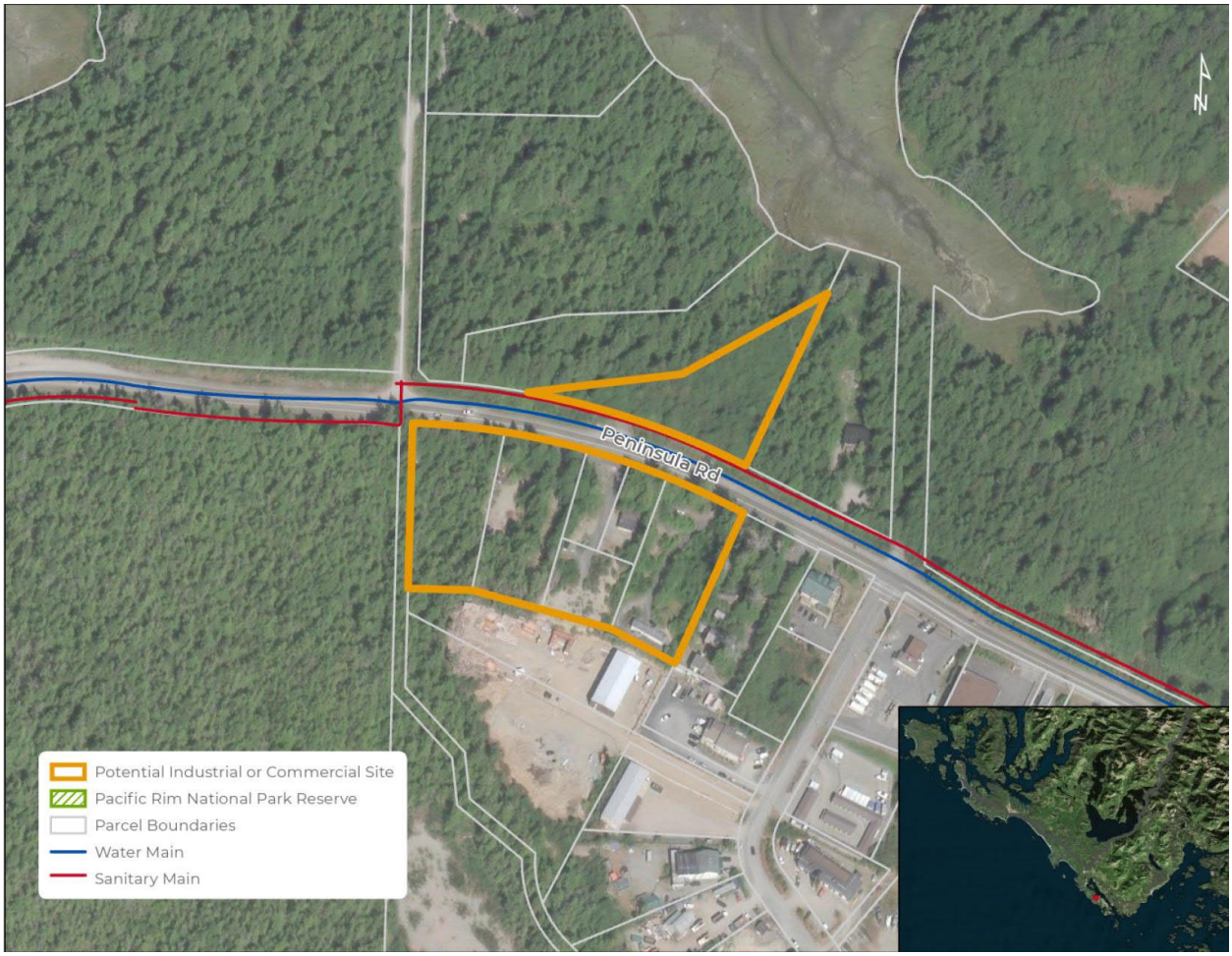


Figure 33: Peninsula Road Properties – Site Map

6.2.4 SEA PLANE BASE ROAD PROPERTIES

These two properties on Sea Plane Base Road, are designated for varied development including light industrial uses (see **Figure 34**). These uses are intended for the north and western portions of the site, leaving space for residential development along Peninsula Road and existing tourism commercial uses at the Ucluelet Campground. One parcel in the Sea Plane Base Road Properties is held by the municipality and the other is privately owned. The properties are zoned for several uses including: Service Commercial (CS-2), Industrial (I-1) Rural Residential (RU), Tourist Commercial (CS-5), and Public Institutional (P-1), and have access to water and sanitary sewer servicing along Peninsula Road.

Given the mix in zoning, these sites could develop in several different ways. The proximity to the sea plane terminal could be of interest to some businesses. Appropriate buffers would be required between light industrial uses and residential / tourist accommodation uses. Additionally, portions of this site are prone to flooding which reduces the total developable area from 54.8 acres to 32 acres of which 12 may be suitable for industrial development.

Table 41: Sea Plane Road Properties – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
12 acres (4.9 ha)	Adjacent to municipal water and sanitary sewer servicing	Light Industrial: 66,529 sq. ft. Industrial Park: 190,082 sq. ft.	Light Industrial: 136,859 sq. ft. Industrial Park: 152,065 sq. ft.	Light Industrial: 182,478 sq. ft. Industrial Park: 76,033 sq. ft.

Figure 34: Sea Plane Road Properties – Site Map

6.2.5 HYPHOCUS ISLAND PROPERTY

This vacant property on Hyphocus Island on Sea Plane Base Road is designated for both residential and industrial uses (see **Figure 35**). Industrial development, including both business park and light industrial uses, are focused near the municipal sewage lagoon which the property surrounds. The site is zoned Rural Residential (RU) and is serviced by municipal sanitary sewer infrastructure (see **Table 42**). Lands adjacent to the sewage lagoon could be more affordable for light industrial development than other locations in the region. The location is also suitable for marine industrial and institutional uses. The location at the far end of Ucluelet might mean that other light industrial lands get developed first.

Table 42: Hyphocus Island Property – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
10 acres (4.0 ha)	Adjacent to sanitary sewer servicing No water servicing	Light Industrial: 30,796 sq. ft. Industrial Park: 87,994 sq. ft.	Light Industrial: 63,356 sq. ft. Industrial Park: 70,396 sq. ft.	Light Industrial: 84,475 sq. ft. Industrial Park: 40,042 sq. ft.

Figure 35: Hyphocus Island Property – Site Map

6.3 ALBERNI-CLAYOQUOT REGIONAL DISTRICT

6.3.1 AIRPORT LANDS

The lands around Tofino-Long Beach Airport were consistently noted as potential opportunities to expand industrial land use supply in the West Coast Region. These four properties located along Airport Road were considered to have the highest potential for this type of development and are the largest estimated supply of industrial land (see **Figure 36**). Despite the size of these parcels, estimated development was concentrated around Airport Road, leaving significant buffers to Pacific Rim National Park Reserve to the west and north. The site is zoned Rural Residential (RU) and is limited by servicing infrastructure in the area. The central location of these lands within the region would make the location well suited for a company with staff coming from both Tofino and Ucluelet.

Table 43: Airport Lands – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
195.2 acres (79 ha)	New or upgraded servicing required	Light Industrial: 329,023 sq. ft.	Light Industrial: 493,534 sq. ft.	Light Industrial: 658,045 sq. ft.

Figure 36: Airport Lands – Site Map

6.3.2 TOFINO-UCLUELET HIGHWAY PROPERTY (NORTH)

This property is a vacant site near the Tofino-Ucluelet Highway close to the Port Albion Road junction (see **Figure 37**). This site is designated for industrial use and has waterfront access along the northern shore of Ucluelet Harbour. Current zoning for the property is Industrial Storage (I3) under the Alberni-Clayoquot Regional District's draft zoning bylaw and the site could potentially be serviced by water infrastructure from the District of Ucluelet, however, this would be at the discretion of Ucluelet Council . Additional consideration is required for road access to the property from the Tofino-Ucluelet Highway. The central location between Tofino and Ucluelet and the water access could be of interest to some companies. However, this site also has notable environmental value and may not be ideally suited for industrial development. First Nations and Millstream residents' support would be critical for this land to be developed due to the environmental impact on the inlet and adjacent lands.

Table 44: Tofino-Ucluelet Highway Property (North) – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
16.6 acres (6.7 ha)	Existing water infrastructure (District of Ucluelet) located along Tofino-Ucluelet highway No sanitary sewer servicing	Light Industrial: 94,378 sq. ft.	Light Industrial: 141,567 sq. ft.	Light Industrial: 188,757 sq. ft.

Table 37: Tofino-Ucluelet Highway Property (North) – Site Map

6.3.3 TOFINO-UCLUELET HIGHWAY PROPERTY (SOUTH)

These lands, located along the Tofino-Ucluelet Highway north of Ucluelet, have potential for light industrial development (see **Figure 38**). The site is zoned Industrial Storage (I3) and General and Service Commercial (C1) under the Alberni-Clayoquot Regional District's draft zoning bylaw. It is serviced by water infrastructure from the District of Ucluelet, but sanitary sewer servicing would be required for development (see **Table 45**). The location on the main highway would make this site attractive for a range of uses from service commercial businesses looking to attract visitors, or storage given the central location.

Table 45: Tofino-Ucluelet Highway Property (South) – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
6.2 acres (2.5 ha)	Existing water infrastructure is located along the Tofino-Ucluelet highway No sanitary sewer servicing	Light Industrial: 34,681 sq. ft.	Light Industrial: 52,291 sq. ft.	Light Industrial: 69,721 sq. ft.

Figure 38: Tofino-Ucluelet Highway Property (South) – Site Map

6.4 TLA-O-QUI-AHT FIRST NATION

6.4.1 MUDFLATS PROPERTY

This site contains two parcels that are part of Tla-o-qui-aht First Nation's Treaty Settlement Lands within the District of Tofino, east of Highway 4 bordering Clayoquot Sound (see **Figure 39**). Both parcels are currently vacant and could be eventually developed with a variety of residential, commercial and tourism accommodation uses. It is understood that Tla-o-qui-aht are prioritizing tourist commercial expansion in the area for the initial phases of development. The site is zoned Park and Public Use District (P2) under the *District of Tofino Zoning Bylaw* and is serviced by municipal water infrastructure (see **Table 46**). The waterfront location makes creates the opportunity for tourist accommodation development, even though the property is on the east side of Tofino on the inlet.

Table 46: Mudflats Property – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
82.3 acres (33.3 ha)	Existing municipal water infrastructure crosses site No sanitary sewer servicing	Tourism Commercial: 163,169 sq. ft.	Tourism Commercial: 489,507 sq. ft.	Tourism Commercial: 734,260 sq. ft. Low-Density Commercial: 116,552 sq. ft.

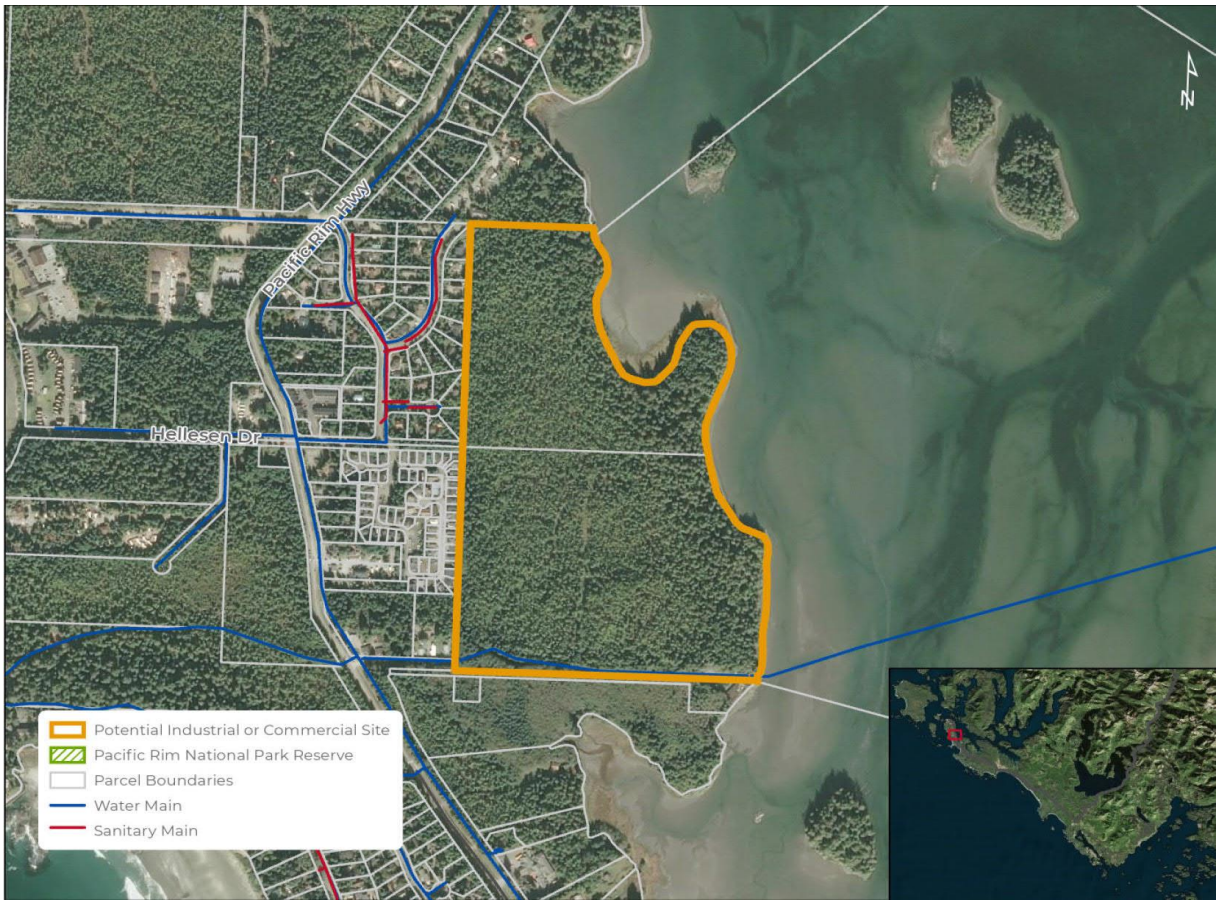


Figure 39: Mudflats Property – Site Map

6.4.2 TIN-WIS RESERVE

The Tin Wis Reserve (Tin Wis 11) is the current location of both the Best Western Tin-Wis Resort and Tla-o-qui-aht First Nation administration (see **Figure 40**). While the coastal areas of the property are largely developed, additional opportunities to expand tourism and general commercial development remain on the vacant portions of the site. Under the District of Tofino zoning bylaw, the site is zoned Destination Campground District (C7) around the Tin-Wis Resort and Public Institutional (P1) on the remainder of the reserve. The site is serviced by municipal water infrastructure (see **Table 47**).

Table 47: Tin-Wis Reserve – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	**SERVICING**	**LOW**	**MED**	**HIGH**
29.3 acres (11.8 ha)	Existing municipal water infrastructure fronts site No sanitary sewer servicing	Tourism Commercial: 65,946 sq. ft. Low-Density Commercial: 31,403 sq. ft.	Tourism Commercial: 131,892 sq. ft. Low-Density Commercial: 62,806 sq. ft.	Tourism Commercial: 164,865 sq. ft. Low-Density Commercial: 94,209 sq. ft.

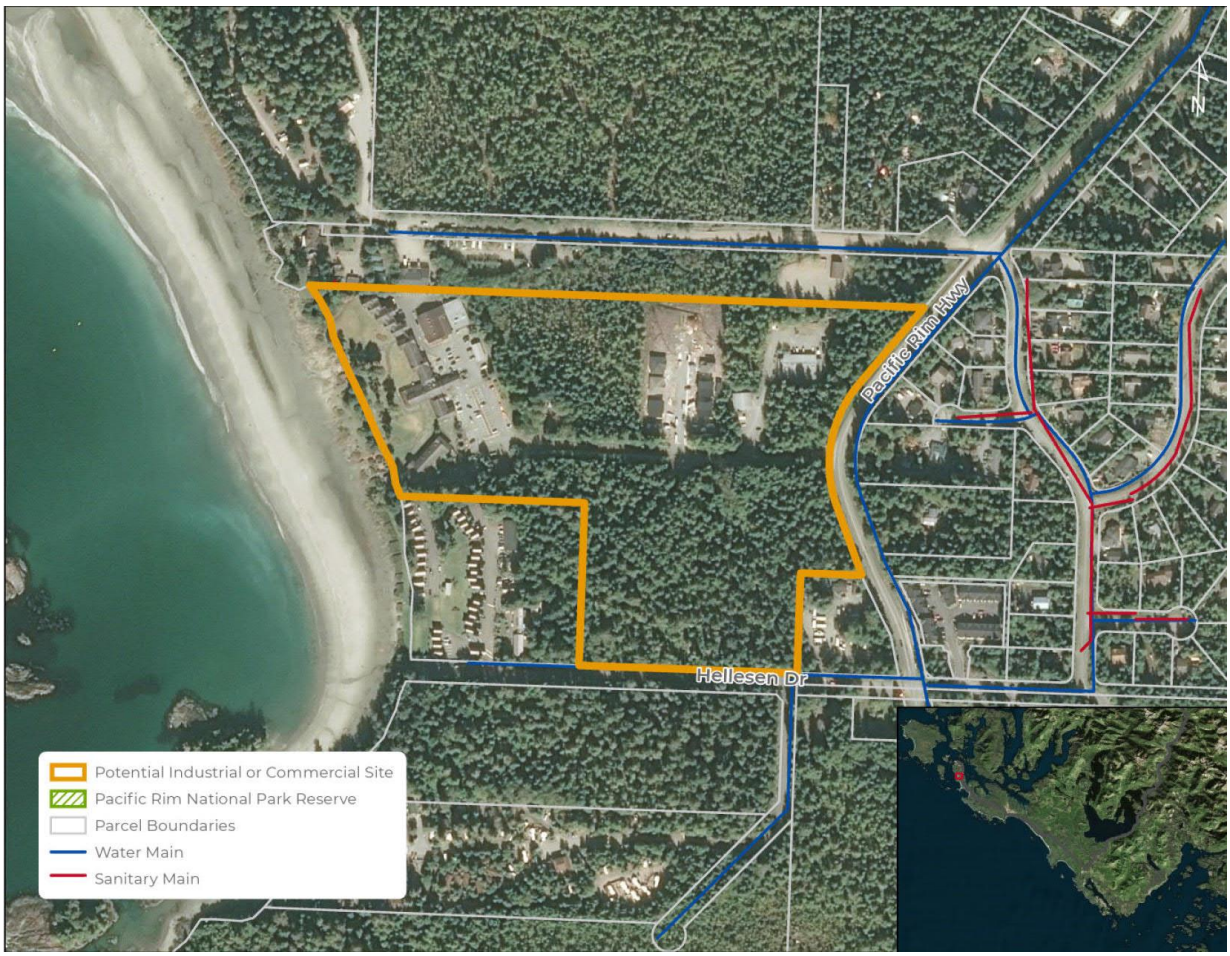


Figure 40: Tin-Wis Reserve – Site Map

6.5 UCLUELET FIRST NATION

6.5.1 PARKSIDE RETAIL SPACE

Ucluelet First Nation are exploring plans for a wide variety of uses for their lands, including a mix of office, service commercial, tourism commercial, and residential uses on a property at the Port Albion Road Junction north of Tofino along the Tofino-Ucluelet Highway (See **Figure 41**). This proposal could include grocery, medical office, restaurant, and gas station uses alongside luxury RV sites and townhome development (see **Table 48**). Ucluelet First Nation anticipates that this site will be the Nation's major project within the next decade.

Table 48: Parkside Retail Space – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
155.6 acres (46.8 ha)	Existing water infrastructure located along the Tofino-Ucluelet highway No sanitary sewer servicing	Low-Density Commercial: 84,000 sq. ft. Tourism Commercial: 40 RV Sites	Low-Density Commercial: 84,000 sq. ft. Tourism Commercial: 40 RV Sites	Low-Density Commercial: 84,000 sq. ft. Tourism Commercial: 40 RV Sites

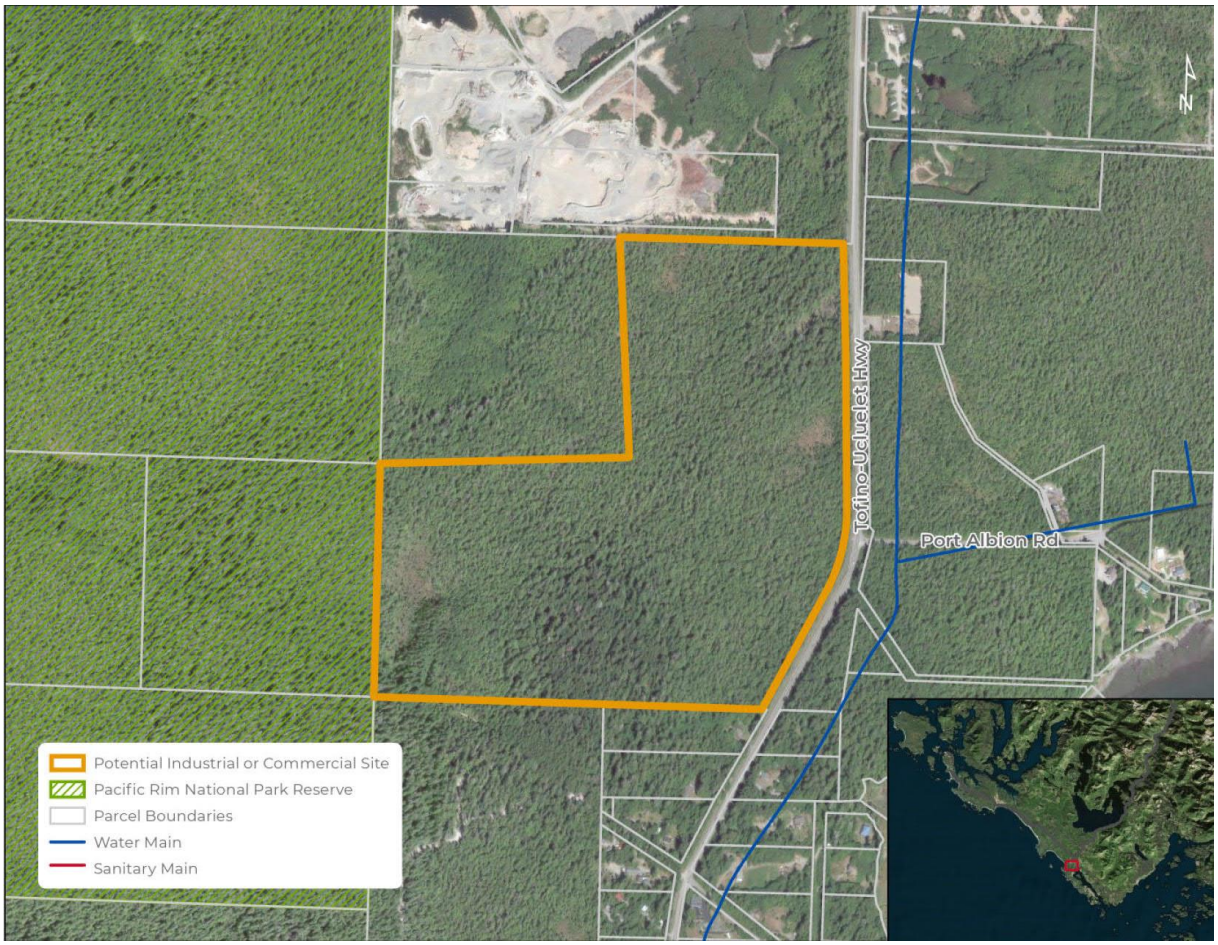


Figure 41: Parkside Retail Space – Site Map

6.5.2 LOST SHOE CREEK INDUSTRIAL SITE

Ucluelet First Nation are planning a heavy industrial site on Treaty Settlement Lands along Highway 4 at the junction with West Road, northeast of the Ucluelet Junction (see **Figure 42**). Timelines for development are uncertain, however potential development would be focused close to the intersection and occupy a maximum of 20 acres of the 507-acre parcel (see **Table 49**). This site is among the limited opportunities for heavy industrial development in the West Coast Region.

Table 49: Lost Shoe Creek Industrial Site – Site Information

SITE INFORMATION		GROWTH SCENARIO		
LAND AREA	SERVICING	LOW	MED	HIGH
507.2 acres (205.3 ha)	No servicing	Heavy Industrial: 28,314 sq. ft.	Heavy Industrial: 56,628 sq. ft.	Heavy Industrial: 84,942 sq. ft.

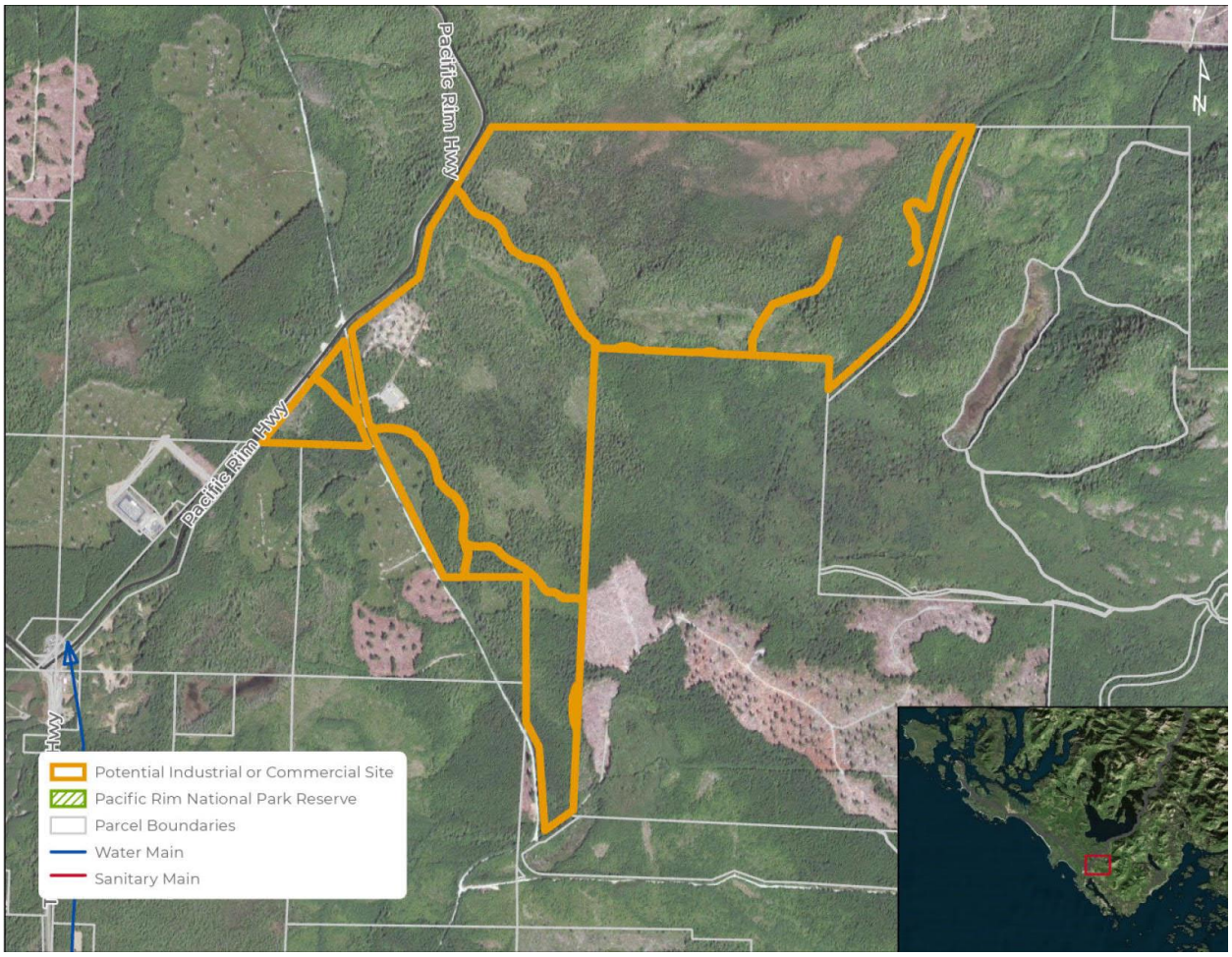


Figure 42: Lost Shoe Creek Industrial Site – Site Map

6.6 SUMMARY OF KEYS COMMERCIAL AND INDUSTRIAL SITES AND GROWTH

The following tables provides a summary of the key growth sites identified in the previous section (see **Table 50**) as well as a summary of the total developable area of these sites for key types of industrial, commercial and tourism commercial land uses in the low, medium, and high scenarios (see **Table 51**).

Table 50: Summary of Key Sites by Growth Scenario

KEY SITE	LAND AREA	LOW SCENARIO	MED SCENARIO	HIGH SCENARIO
DISTRICT OF TOFINO				
Campbell Rd Property	1.7 acres (0.7 ha)	Light Industrial: 20,304 sq. ft.	Light Industrial: 34,808 sq. ft.	Light Industrial: 34,808 sq. ft.
Industrial Way North	7.4 acres (3.0 ha)	Light Industrial: 45,226 sq. ft. Industrial Park: 129,216 sq. ft.	Light Industrial: 116,294 sq. ft. Industrial Park: 64,608 sq. ft.	Light Industrial: 155,054 sq. ft.
Hellesen Drive Property	10.0 acres (4.1 ha)	Tourism Commercial: 199,111 sq. ft.	Tourism Commercial: 298,665 sq. ft.	Tourism Commercial: 298,665 sq. ft.
DISTRICT OF UCLUELET				
Forbes Road Properties	14.7 acres (5.9 ha)	Light Industrial: 179,269 sq. ft.	Light Industrial: 307,319 sq. ft.	Light Industrial: 307,319 sq. ft.
Marine Drive Property	3.4 acres (1.4 ha)	Tourism Commercial: 83,441 sq. ft.	Tourism Commercial: 125,151 sq. ft.	Tourism Commercial: 125,151 sq. ft.
Peninsula Road Properties	5.4 acres (2.2 ha)	Low-Density Commercial: 93,508 sq. ft.	Low-Density Commercial: 187,016 sq. ft.	Low-Density Commercial: 187,016 sq. ft.
Sea Plane Base Road Properties	54.8 acres (22.2 ha)	Light Industrial: 66,529 sq. ft. Industrial Park: 190,082 sq. ft.	Light Industrial: 136,859 sq. ft. Industrial Park: 152,065 sq. ft.	Light Industrial: 182,478 sq. ft. Industrial Park: 76,033 sq. ft.
Hyphocus Island Property	35.8 acres (14.5 ha)	Light Industrial: 30,796 sq. ft. Industrial Park: 87,994 sq. ft.	Light Industrial: 63,356 sq. ft. Industrial Park: 70,396 sq. ft.	Light Industrial: 84,475 sq. ft. Industrial Park: 40,042 sq. ft.
ALBERNI-CLAYOQUOT REGIONAL DISTRICT				
Airport Lands	195.2 acres (79.0 ha)	Light Industrial: 329,023 sq. ft.	Light Industrial: 493,534 sq. ft.	Light Industrial: 658,045 sq. ft.
Tofino-Ucluelet Highway Property (North)	16.7 acres (6.7 ha)	Light Industrial: 94,378 sq. ft.	Light Industrial: 141,567 sq. ft.	Light Industrial: 188,757 sq. ft.

Tofino-Ucluelet Highway Property (South)	6.2 acres (2.5 ha)	Light Industrial: 34,681 sq. ft.	Light Industrial: 52,291 sq. ft.	Light Industrial: 69,721 sq. ft.
TLA-O-QUI-AHT FIRST NATION				
Mudflats Properties	82.3 acres (33.3 ha)	Tourism Commercial: 163,169 sq. ft.	Tourism Commercial: 489,507 sq. ft.	Tourism Commercial: 734,260 sq. ft. Low-Density Commercial: 116,552 sq. ft.
Tin-Wis Resort Property	29.3 acres (11.8 ha)	Tourism Commercial: 65,946 sq. ft. Low-Density Commercial: 31,403 sq. ft.	Tourism Commercial: 131,892 sq. ft. Low-Density Commercial: 62,806 sq. ft.	Tourism Commercial: 164,865 sq. ft. Low-Density Commercial: 94,209 sq. ft.
UCLUELET FIRST NATION				
Parkside Retail Outlet	115.6 acres (46.8 ha)	Low-Density Commercial: 84,000 sq. ft. Tourism Commercial: 40 RV Sites	Low-Density Commercial: 84,000 sq. ft. Tourism Commercial: 40 RV Sites	Low-Density Commercial: 84,000 sq. ft. Tourism Commercial: 40 RV Sites
Lost Shoe Creek Industrial Site	507.2 acres (205.3 ha)	Heavy Industrial: 28,314 sq. ft.	Heavy Industrial: 56,628 sq. ft.	Heavy Industrial: 84,942 sq. ft.

Table 51: Summary of Total Development Potential of Key Sites Identified

LAND USE	LOW	MEDIUM	HIGH
Tourism Commercial	511,663 sq. ft.	1,045,221 sq. ft.	1,322,947 sq. ft.
Commercial	208,911 sq. ft.	333,822 sq. ft.	481,776 sq. ft.
Light Industrial	800,386 sq. ft.	1,346,032 sq. ft.	1,680,660 sq. ft.
Heavy Industrial	28,314 sq. ft.	56,628 sq. ft.	84,942 sq. ft.
Industrial Park	407,295 sq. ft.	287,071 sq. ft.	111,232 sq. ft.

The key sites identified yield a significant amount of commercial, tourism commercial and industrial land. Based on current demand trends and long-term growth estimates these keys sites should be able to supply a sufficient industrial, commercial and tourism commercial land to meet the total demand over the next 30 years as described in **Sections 4** and shown in **Table 52** (below). The one exception to this maybe the high-end scenario for tourist commercial development land where those lands most suitable for this purpose (as identified in **Table 51** above) maybe exhausted before the maximum potential demand of 6785 units is met. This is due to the fact that lands suitable tourism commercial uses are also suitable for residential uses and / or located close to environmentally sensitive areas of the region. For this reason, there may be a limit to future tourism commercial development. However, there may also be

a benefit to evaluating community support for future tourism community uses and determining if more land is required for this purpose and if this could be feasibility supported by the existing land base while protecting the region's ecological integrity.

Table 52: Summary of Total Commercial and Industrial Demand

LAND USE	LAND USE DEMAND RANGE
Industrial	15 acres to 50 acres
Commercial	170,000 sq. ft - 275,000 sq. ft.
Tourist Commercial Units	1,391 – 6,785 Units

7.0 INFRASTRUCTURE ANALYSIS

Building upon the development scenarios outlined in the previous section, a high-level infrastructure analysis was integrated to better understand the feasibility and costs of servicing each land use scenario. This analysis allows potential growth to consider existing conditions and incorporate the required costs for development in the West Coast Region. This section will ultimately provide additional information to test the low, medium, and high land use scenarios and to understand how projected growth could be most efficiently absorbed by the participating communities.

7.1 METHOD

Using available infrastructure from participating communities, vacant and underutilized parcels were assigned a "servicing level" or an indication of current service levels on the site, and the potential for future service provision. The six levels defined for the purposes of this study are detailed in **Table 53** below:

Table *53*: Description of Service Levels applied to infrastructure analysis of vacant and underutilized lands in the West Coast Region.

SERVICE LEVEL	DESCRIPTION
Level 1	Parcel has existing sanitary sewer and water servicing or that is currently not serviced but servicing construction is known to be in progress.
Level 2	Parcel has existing sanitary sewer or water servicing and can easily be fully serviced with minor infrastructure upgrades or expansion.
Level 3	Parcel is at the periphery of existing municipal service. Limited infrastructure upgrades and expansion in the short- or medium-term may be required to fully service the parcel.
Level 4	Parcel is not serviced, and significant infrastructure upgrades or expansion may be required. Parcel could be fully serviced in the medium-term.
Level 5	Parcel is not serviced, and significant infrastructure upgrades or expansion would be required to fully service the site. Parcel may only be fully serviced in the long-term.
Level 6	Parcel is unlikely to be serviced in the long-term.

The costs associated with developing water, sanitary sewer, and road infrastructure were considered throughout this analysis with general unit costs applied to the whole region. Linear infrastructure unit costs were based on the land use scenario, with costs rising from the low to high scenario. As more intense development is envisioned for the communities, higher unit costs are assumed given that increasing population densities would require greater infrastructure capacity. The servicing specifications for sanitary sewer and water infrastructure for each scenario are defined in **Table 54** below.

Road classifications used for estimating are summarized in **Table 55** and are based on the design specifications in the District of Tofino's Subdivision Servicing Bylaw. Street lighting and stormwater drainage including ditching and culverts were included in the unit costs for each road classification.

Table *54*: Assumed specifications of sanitary and water infrastructure

	LOW SCENARIO			MEDIUM SCENARIO			HIGH SCENARIO		
	Service Connection Spacing	Hydrant Spacing	Pipe Size	Service Connection Spacing	Hydrant Spacing	Pipe Size	Service Connection Spacing	Hydrant Spacing	Pipe Size
Water	40 m	150 m	200 mm	30 m	115 m	200 mm	20 m	80 m	250 mm
Sanitary Sewer	40 m	-	200 mm	30 m	-	300 mm	20 m	-	300 mm

Table *55*: Assumed specifications of road infrastructure

	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Road Classification	Minor collector	Minor arterial	Major arterial
Right-of-Way Width	6.6 metres	7.2 metres	15.8 metres

Along with asset cost studies on generalized infrastructure construction replacement costs, these specifications were used to develop unit costs for each infrastructure type[33]. Historical unit costs were adjusted to 2019 dollars using the Engineering News Record national construction cost index to account for inflation and construction industry trends in the years since these best practice documents were released. In addition to unit costs, considerations were added for both engineering and contingency costs that assume a flat rate of 45% of total infrastructure costs. This rate consists of 35% contingency costs and 10% engineering costs. Water, road, and sanitary sewer service unit costs used are outlined in

[33] R.J. Burnside & Associates Ltd. and the Ontario Ministry of Public Infrastructure Renewal, Water and Wastewater Asset Cost Study (2005).

Table 56 on the following page.

Table 56: Linear unit infrastructure cost assumptions for development scenarios

	Low Scenario (cost per metre)	Medium Scenario (cost per metre)	High Scenario (cost per metre)
Water	$715	$757	$882
Sanitary Sewer	$668	$696	$795
Road	$3,544	$3,606	$4,497
Engineering Costs	10% of servicing costs		
Contingency Costs	35% of servicing costs		

To integrate the financial implications of servicing the Region's vacant and underutilized lands, infrastructure costs were assigned to each site based on existing site servicing, with only services that are not currently on-site being considered for costs. In the absence of defined road rights-of-way and desired paths for infrastructure to follow through vacant sites, it was assumed that a single linear route for roads and service mains would be required. One exception was for those areas in Ucluelet where multiple parcels would be connected to shared linear infrastructure, the costs of the trunk infrastructure were shared based on the proportion of estimated population equivalents for the parcel along that connection. In rural residential areas in the ACRD, it was assumed that only existing water infrastructure would be expanded but new services would not be introduced due to the governance challenges and costs associated with building new infrastructure in these areas. Development types proposed in the land were consistent with this assumption.

7.2 SERVICE PROFILES

Each participating community has different context to local infrastructure, with varying access to land with existing services and the potential for vacant and underutilized lands to be serviced in the short-, medium-, and long-term. As described in the previous section, vacant and underutilized lands were categorized based on understanding of local infrastructure to estimate future infrastructure requirements and servicing costs across the West Coast Region. This section will summarize known services in the participating communities and the vacant and underutilized lands in each community by service level.

Throughout the West Coast Region, the largest Service Level was Level 1 which makes up over a quarter of the total vacant and underutilized land. Levels 2 and 3 are approximately the same size or approximately 12% of vacant and underutilized land, as are Levels 4 and 5 which are 20%, respectively. Service Level 6 is the smallest Service Level, consisting of 8% of all vacant and underutilized lands in the West Coast Region. The areas of the six Service Levels across the Region are summarized in **Table 57** below.

Table 57: Summary of Service Levels of vacant and underutilized lands in the West Coast Region

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	352.8 acres	27%
Level 2	157.5 acres	12%
Level 3	153.6 acres	12%
Level 4	262.9 acres	20%
Level 5	259.1 acres	20%
Level 6	102 acres	8%

Figure 43: Service Levels of Vacant and Underutilized Lands in the District of Tofino and Tla-o-qui-aht First Nation.

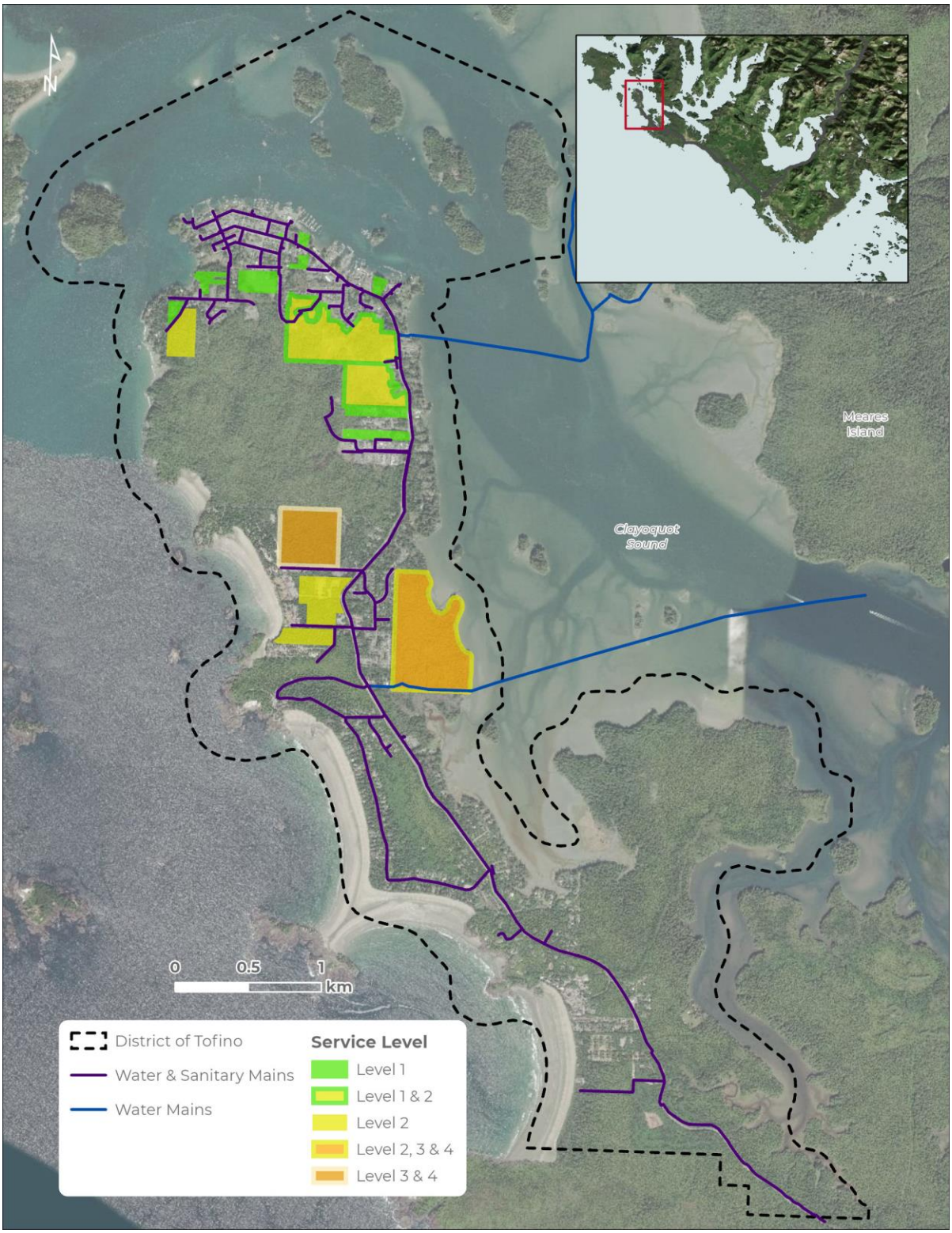


Figure 44: Service Levels of Vacant and Underutilized Lands in the District of Ucluelet

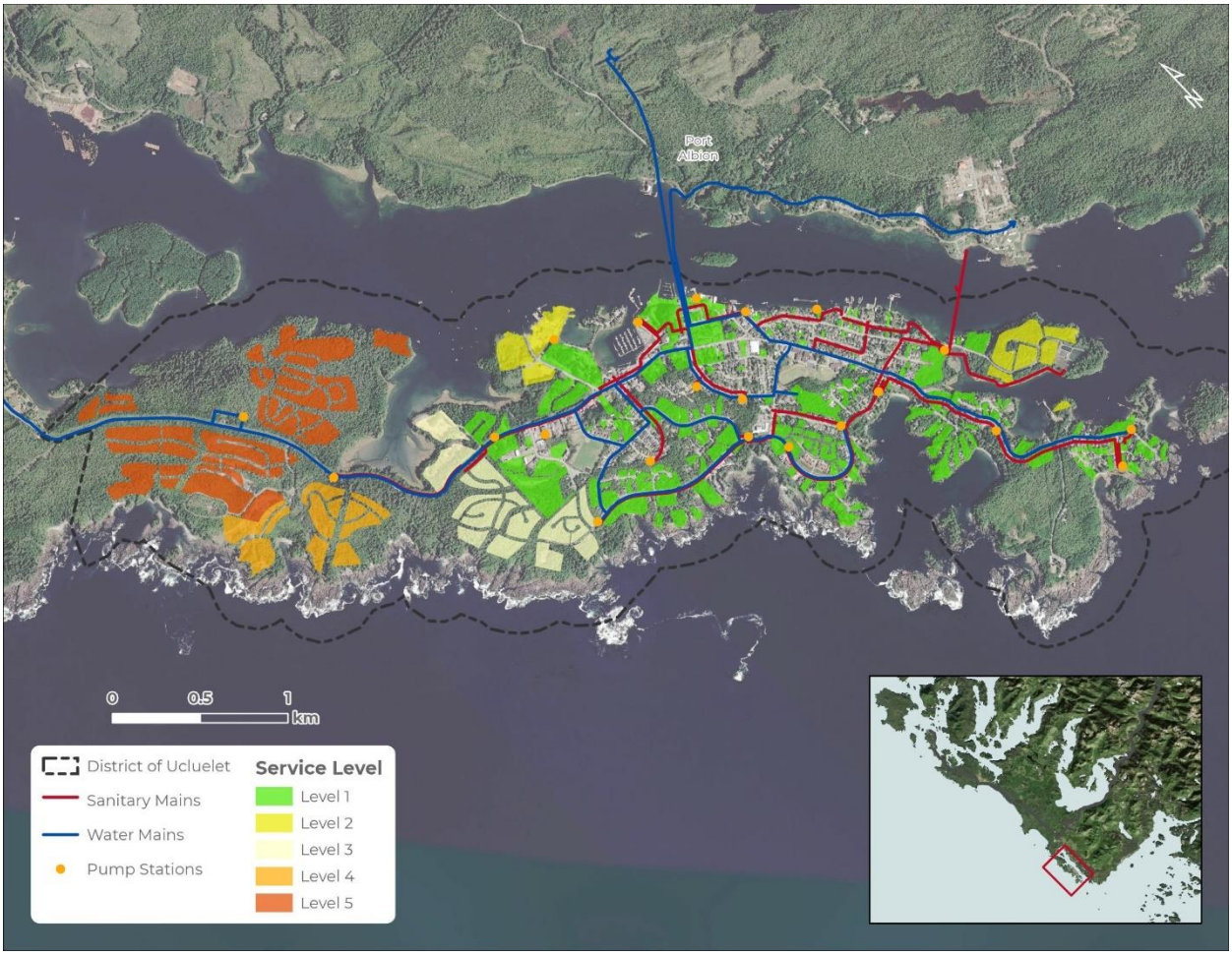


Figure 45: Service Levels of Vacant and Underutilized Lands of Alberni-Clayoquot Regional District and Ucluelet First Nation lands in the Millstream and Tofino-Long Beach Airport areas

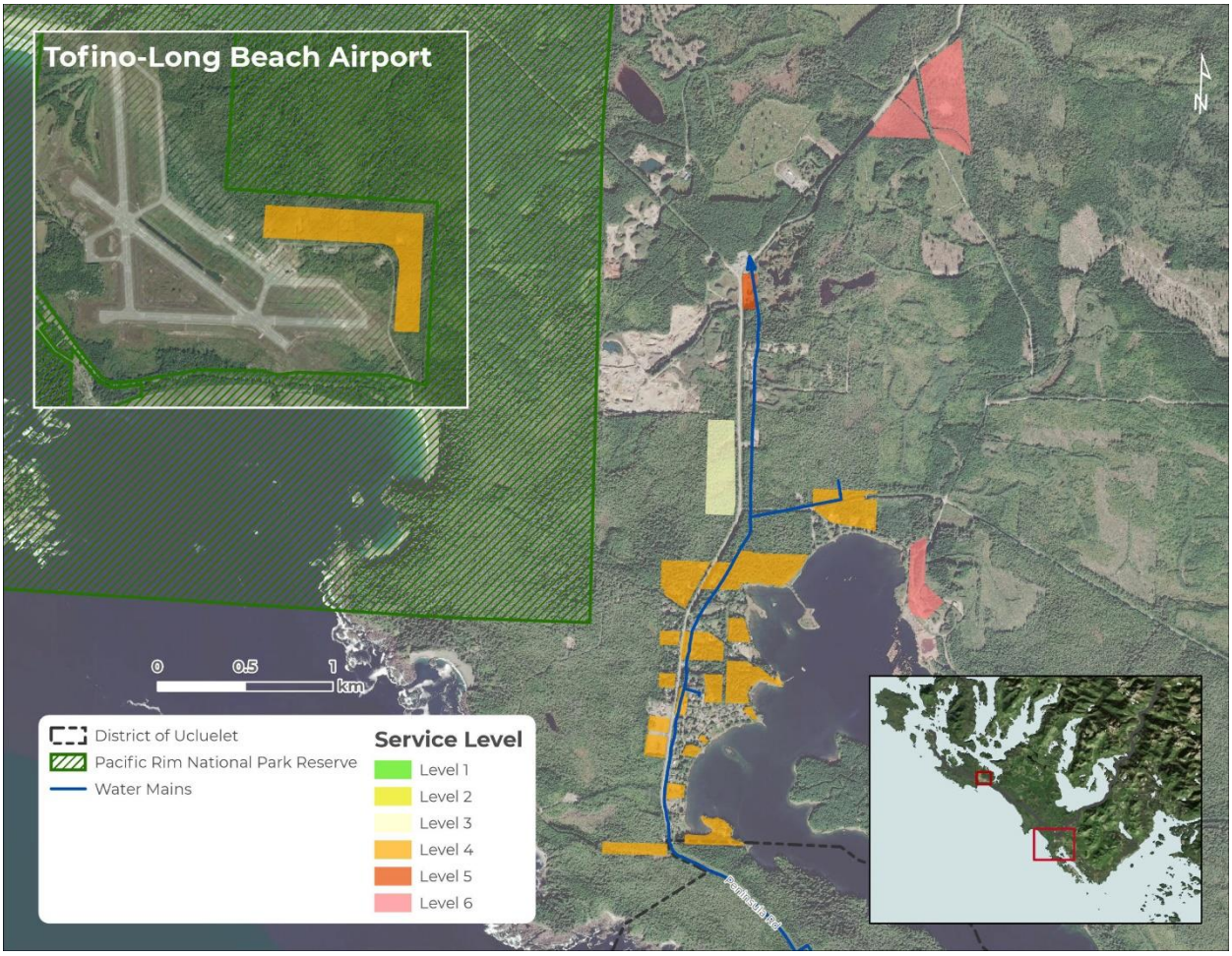
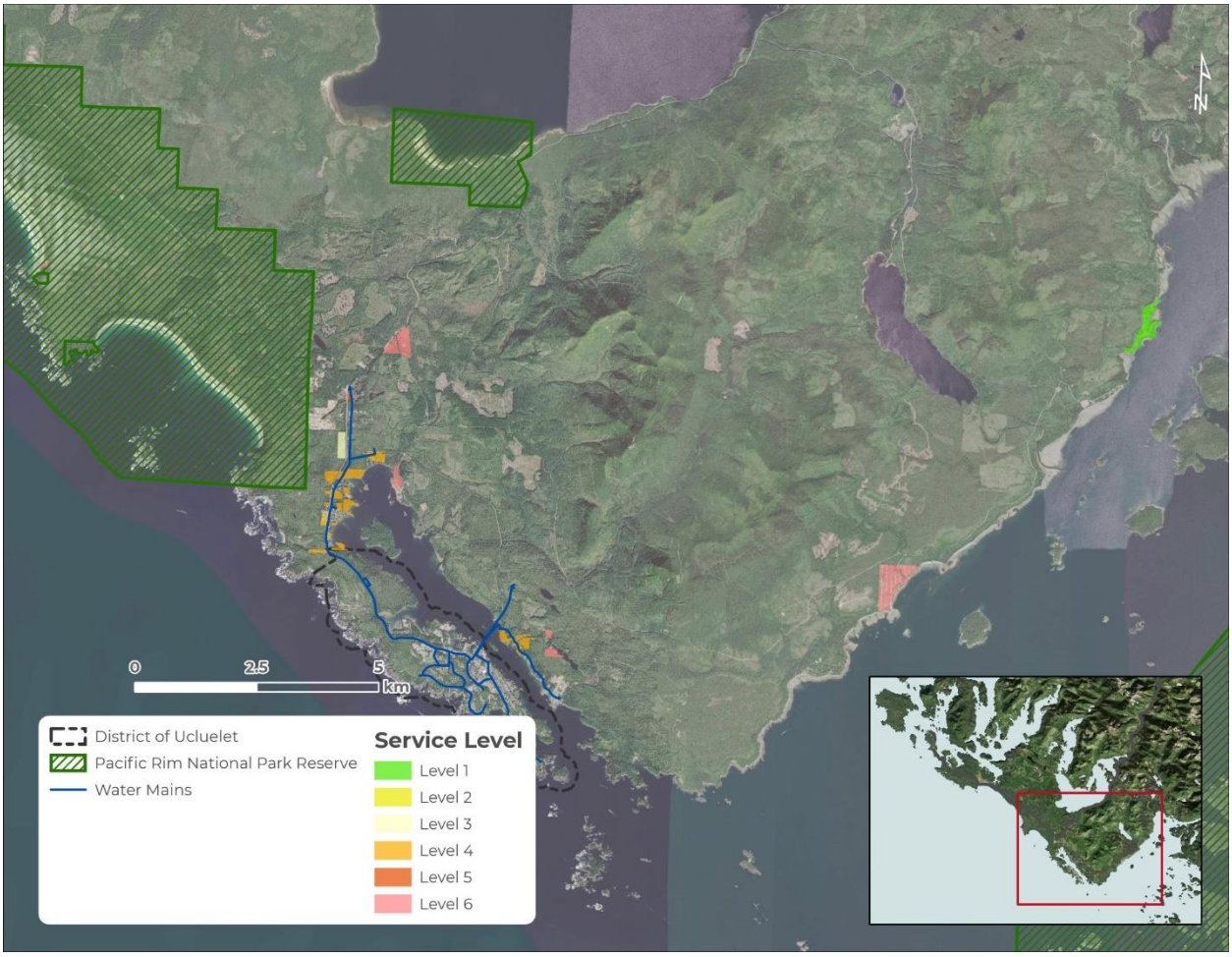


Figure 46: Service Levels of Vacant and Underutilized Lands in the Alberni-Clayoquot Regional District, Toquaht First Nation, and Ucluelet First Nation lands



7.2.1 DISTRICT OF TOFINO

The District of Tofino has broad service coverage around the Village Centre, with local water and sewer infrastructure in residential neighbourhoods in the southern parts of the community. Most of Tofino is connected to water infrastructure, meaning that all vacant and underutilized sites would have access at least one service readily available. As a result, most sites included in the study are in Levels 1 to 2 as shown in **Table 58**.

One critical consideration for the District service are the known limits of current municipal infrastructure, with both municipal water and sanitary sewer systems close to capacity. Through the OCP process it was estimated that remaining infrastructure capacity allowed for approximately 160 units of new development, with water infrastructure being the first municipal service to be maximized.

Upgraded water and wastewater systems are currently being discussed by the District and estimated costs approximately $84 m for an expanded wastewater facility and $7.6 m for reservoir upgrades. This investment will be dependent on cost-sharing with senior government and potentially local First Nations, like Tla-o-qui-aht First Nation. Ultimately, these projects are most significant barrier to growth in the District.

Table 58: Summary of Service Levels of District of Tofino vacant and underutilized lands

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	81.5 acres	55%
Level 2	66.3 acres	45%
Level 3	-	-
Level 4	-	-
Level 5	-	-
Level 6	-	-

7.2.2 DISTRICT OF UCLUELET

The District of Ucluelet's municipal infrastructure provides water and sewer and naturally is concentrated around the community's developed areas. Most of Ucluelet's vacant lands remain un-serviced, including large areas of land north of the village centre under the ownership of Onni Group and Weyerhaeuser Company. As such, Ucluelet's vacant and underutilized lands are divided between Service Levels 1 and 5 as shown in **Table 59**.

District infrastructure does also extend to outlying areas in the ACRD, including Port Albion, Hitacu, and as far as the Ucluelet Junction along the Tofino-Ucluelet Highway and therefore plays an important role in servicing other communities.

Table 59: Summary of Service Levels of District of Ucluelet vacant and underutilized lands

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	210.8 acres	43%
Level 2	41.5 acres	9%
Level 3	63.7 acres	13%
Level 4	43 acres	9%
Level 5	126.7 acres	26%
Level 6	-	-

7.2.3 ALBERNI-CLAYOQUOT REGIONAL DISTRICT

The ACRD provides limited infrastructure in the West Coast Region since most development in these areas is rural and dispersed. Areas with more existing development, such as Millstream or Port Albion, are connected to Ucluelet's municipal water infrastructure with no known sanitary sewer service. This limited servicing and the rural nature of the Region means that many of the identified vacant and underutilized sites are unlikely to ever be serviced and therefore are included in Service Levels 4 to 6, as summarized in **Table 60** and shown in **Figure 45** and **Figure 46**. This considers the challenging nature of establishing new services in a regional district, where new servicing infrastructure cannot be created without a referendum approved by all affected residents.

The potential light industrial lands around Tofino-Long Beach Airport are unique to the Region since they could connect to water infrastructure managed by Parks Canada, however these upgrades would have to align with Parks Canada capital planning priorities.

Table 60: Summary of Service Levels of Alberni Clayoquot Regional District vacant and underutilized lands

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	-	-
Level 2	-	-
Level 3	-	-
Level 4	160.6 acres	55%
Level 5	41.7 acres	14%
Level 6	90.1 acres	31%

7.2.4 TLA-O-QUI-AHT FIRST NATION

Tla-o-qui-aht First Nation's lands included in this study are largely within the boundaries of the District of Tofino and therefore are close or already connected to municipal services. Like the vacant and underutilized sites in Tofino, most of the parcels could be easily connected to municipal water infrastructure but would require further investment to introduce sanitary sewer service. Building roads to cover the large, vacant parcels would also incur significant costs for the Nation. These considerations mean that the Tla-o-qui-aht Nation's lands were included in Service Levels 2 to 4, as summarized in **Table 61,** and shown in **Figure 43.**

Since any development Tla-o-qui-aht First Nation pursues around the Tin Wis Reserve and on other Nation lands within the District of Tofino would likely integrate with municipal services, the constraints that apply to the water and wastewater systems in Tofino will apply to Tla-o-qui-aht lands. As detailed in Section 6.2.2, this means that development will be limited by existing system capacity which will only permit approximately 160 additional units to be connected to the Tofino water system. Therefore, close collaboration between Tla-o-qui-aht First Nation and the District of Tofino will be required to ensure that growth respects infrastructure limits and that the parties equitably distribute costs for shared infrastructure improvements.

Table *61*: Summary of Service Levels of Tla-o-qui-aht First Nation vacant and underutilized lands

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	-	-
Level 2	49.6 acres	35%
Level 3	46.9 acres	33%
Level 4	46.9 acres	33%
Level 5	-	-
Level 6	-	-

7.2.5 TOQUAHT FIRST NATION

Development on Toquaht Nation land will largely be contained to the Secret Beach project. As such, the Nation will be developing and managing local water, wastewater, and road infrastructure that specifically serves this area and will not connect to services in other jurisdictions. Since this project is in advanced stages of infrastructure planning, the entire development was included in Service Level 1, as shown in **Table 62** and **Figure 46.**

Table 62: Summary of Service Levels of Toquaht First Nation vacant and underutilized lands

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	60.5 acres	100%
Level 2	-	-
Level 3	-	-
Level 4	-	-
Level 5	-	-
Level 6	-	-

7.2.6 UCLUELET FIRST NATION

Ucluelet First Nation's land development projects are in areas with various levels of existing infrastructure. Much of the Nation's anticipated growth will occur in areas without existing servicing and will likely rely on developing on-site water and sanitary infrastructure or connecting to existing municipal infrastructure. As a result, most of the sites identified for development by Ucluelet First Nation were in included in Service Levels 3 to 6 as summarized in **Table 35** and shown in **Figure 45** and **Figure 46**.

Table 35: Summary of Service Levels of Ucluelet First Nation vacant and underutilized lands

SERVICE LEVEL	TOTAL AREA	% of AREA
Level 1	-	-
Level 2	-	-
Level 3	21.5 acres	27%
Level 4	6.2 acres	8%
Level 5	45.3 acres	57%
Level 6	6.0 acres	8%

7.3 INFRASTRUCTURE ANALYSIS RESULTS BY COMMUNITY

7.3.1 DISTRICT OF TOFINO

With established infrastructure and vacant and underutilized lands located in close to the village centre, all of Tofino's projected lands are in Service Levels 1 or 2. Throughout the three scenarios, those parcels in Level 1 account for a majority of the commercial, industrial, and institutional uses, along with a large portion of residential development. Level 2 parcels supply all tourism commercial lands with some low-density commercial and residential uses as well. This means that Tofino's vacant and underutilized lands are relatively feasible to develop from a servicing perspective. Full results from the infrastructure analysis of all three development scenarios in Tofino are shown in **Tables 64-66.**

From a financial perspective, the District of Tofino would bear some costs to fully service the municipality's vacant and underutilized lands, with estimates ranging from $11.8m to $15m. It is important however to reiterate that Tofino's current infrastructure must undergo significant upgrades after limited growth. Investment into both water and wastewater systems will be required after the equivalent of approximately 160 additional residential units are connected to current infrastructure. These conditions mean current system capacity will be exceeded before the buildout of Level 1 is complete under each scenario. Therefore, in addition to the costs incurred through development in Level 2, it is understood that upgrades to water storage will cost the District approximately $7.6 m and constructing a new wastewater treatment facility will cost approximately $84 m.

Table 64: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario, District of Tofino.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	236	231	-	-	-	-
Small Lot Single-Family	96	114	-	-	-	-
Townhouse	137	35	-	-	-	-
Multi-Family Residential	30	-	-	-	-	-
Tourism Commercial	-	199,110	-	-	-	-
Commercial (Low-Density)	30,052	18,824	-	-	-	-
Commercial (High-Density)	17,528	-	-	-	-	-
Light Industrial	65,530	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	129,216	-	-	-	-	-
Institutional	49,483	-	-	-	-	-
Population Equivalents	1,539	1,345	-	-	-	-
Service Cost ($)	-	$11,782,470	-	-	-	-

Table *65:* Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario, District of Tofino.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	148	169	-	-	-	-
Small Lot Single-Family	181	158	-	-	-	-
Townhouse	154	108	-	-	-	-
Multi-Family Residential	120	-	-	-	-	-
Tourism Commercial	-	298,665	-	-	-	-
Commercial (Low-Density)	78,929	56,473	-	-	-	-
Commercial (High-Density)	26,292	-	-	-	-	-
Light Industrial	151,102	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	64,608	-	-	-	-	-
Institutional	58,089	-	-	-	-	-
Population Equivalents	1,770	1,580	-	-	-	-
Service Cost ($)	-	$11,989,143	-	-	-	-

Table 66: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario, District of Tofino.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	119	133	-	-	-	-
Small Lot Single-Family	132	174	-	-	-	-
Townhouse	270	164	-	-	-	-
Multi-Family Residential	172	-	-	-	-	-
Tourism Commercial	-	298,665	-	-	-	-
Commercial (Low-Density)	75,297	75,297	-	-	-	-
Commercial (High-Density)	76,818	-	-	-	-	-
Light Industrial	189,867	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	64,543	-	-	-	-	-
Population Equivalents	1,867	1,646	-	-	-	-
Service Cost ($)	-	$14,9510,451	-	-	-	-

7.3.2 DISTRICT OF UCLUELET

The large amounts of vacant and underutilized lands in Ucluelet mean that this land is distributed across five service levels throughout the District. Unlike Tofino, the extent of Ucluelet's lands means that infrastructure requirements are greater and will incur higher costs at each service level. However, parcels in Level 1 account for a substantial portion of possible residential, tourism commercial, commercial, and industrial land use supply in Ucluelet under each development scenario. Therefore, significant development could be undertaken without the need for major servicing improvements. Additional land use supply is distributed across the other four service levels. Results from the infrastructure analysis of all three development scenarios in Ucluelet are shown in **Table 67-69.**

The new infrastructure required to service undeveloped parcels in Service Levels 2 to 5 result in total servicing costs between an estimated $62.9m and $78.4m to achieve full buildout. While costs between Levels 2, 3 and 4 are relatively consistent, larger investment will be required to service the land in Level 5. This is due to large area and distributed development included under Level 5 but also the increasing distance from existing infrastructure in Ucluelet's core areas.

Table *67*: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario, District of Ucluelet.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	450	21	74	88	317	-
Small Lot Single-Family	177	42	74	96	224	-
Townhouse	362	11	139	13	124	-
Multi-Family Residential	397	-	-	-	-	-
Tourism Commercial	258,902	-	238,822	143,197	97,437	-
Commercial (Low-Density)	211,434	-	34,389	-	8,713	-
Commercial (High-Density)	341,294	-	-	-	-	-
Light Industrial	183,250	133,660	18,708	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	159,558	381,886	53,453	-	-	-
Institutional	-	24,090	17,587	-	13,999	-
Population Equivalents	4,240	655	1,086	738	1,995	-
Service Cost ($)	-	$12,039,070	$11,563,957	$9,737,364	$29,606,400	-

Table *68*: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario, District of Ucluelet.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	427	13	44	50	242	-
Small Lot Single-Family	186	59	92	83	336	-
Townhouse	331	11	137	124	122	-
Multi-Family Residential	538	-	122	62	111	-
Tourism Commercial	342,013	-	315,724	214,795	146,155	-
Commercial (Low-Density)	454,122	-	68,778	-	17,427	-
Commercial (High-Density)	511,941	-	-	-	-	-
Light Industrial	315,508	274,958	38,486	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	157,283	305,509	42,762	-	-	-
Institutional	-	32,120	23,449	-	18,666	-
Population Equivalents	4,893	738	1,356	982	2,334	-
Service Cost ($)	-	$12,364,522	$11,933,562	$9,568,200	$30,428,800	-

Table 69: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario, District of Ucluelet.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	411	-	31	33	174	-
Small Lot Single-Family	167	51	75	101	401	-
Townhouse	238	67	140	116	222	-
Multi-Family Residential	821	-	244	124	150	-
Tourism Commercial	342,013	-	315,724	214,795	146,155	-
Commercial (Low-Density)	485,376	-	68,778	-	17,427	-
Commercial (High-Density)	511,941	-	-	-	-	-
Light Industrial	318,238	366,611	51,314	-	-	-
Heavy Industrial	152,733	152,755	21,381	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	40,151	29,311	-	23,332	-
Population Equivalents	5,053	741	1,450	1,061	2,581	-
Service Cost ($)	-	$15,084,876	$14,673,156	$11,637,000	$37,008,000	-

7.3.3 ALBERNI-CLAYOQUOT REGIONAL DISTRICT

Development in the ACRD is typically more distributed and therefore should require minimal servicing infrastructure to accommodate projected development on vacant and underutilized lands. As a result of the low feasibility of rapid growth and the need for greater servicing capacity, development on Regional District lands is restricted to Service Levels 4 to 6, with only water and road infrastructure being considered. While some underutilized and vacant parcels have access to water infrastructure, around Millstream and Port Albion for example, the lack of communal wastewater facilities limited parcels in the ACRD to service levels that may only be fully serviced over the very long-term or perhaps never serviced. The financial and logistical constraints on remote development and the need for local consensus (through referendum) to build establish services limit the possibilities for future servicing of ACRD lands. Results from the infrastructure analysis of all three development scenarios in the ACRD are shown in **Tables 70-72**

As a result of many of the factors discussed, many parcels in the ACRD were not considered feasible to service and therefore did not have servicing costs attributed to the site. Overall, it is estimated that new infrastructure would cost between $2.4m and $3m to expand water utilities. Estimated servicing costs for the ACRD are largely a result of water service expansion to the Tofino-Long Beach Airport lands from existing Parks Canada-owned utilities along the Pacific Rim Highway. Despite being included in Service Level 4, these lands could become an important supply of light industrial land uses over the long-term.

Table *70*: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario, Alberni-Clayoquot Regional District.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	-	-	18	6	19
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	-	-	-	-	-
Commercial (Low-Density)	-	-	-	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	458,262	-	-
Heavy Industrial	-	-	-	-	35,404	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	-	-	436	47	57
Service Cost ($)	-	-	-	$1,534,405	$870,878	-

Table 71: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario, Alberni-Clayoquot Regional District.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	-	-	32	9	48
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	-	-	-	-	-
Commercial (Low-Density)	-	-	-	15,992	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	687,392	-	-
Heavy Industrial	-	-	-	-	70,807	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	-	-	685	87	144
Service Cost ($)	-	-	-	$1,625,322	$922,480	-

Table 72: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario, Alberni-Clayoquot Regional District.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	-	-	58	13	77
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	-	-	-	-	-
Commercial (Low-Density)	-	-	-	31,983	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	916,523	-	-
Heavy Industrial	-	-	-	-	106,211	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	-	-	967	127	231
Service Cost ($)	-	-	-	$1,892,627	$1,074,194	-

7.3.4 TLA-O-QUI-AHT FIRST NATION

Development on Tla-o-qui-aht First Nation lands around Tofino have a variety of current servicing conditions and were determined to be in Service Levels 2 to 4. Since the vacant and underutilized parcels considered are large individual parcels, two of the sites were divided into two or three service levels. This assumption recognizes that areas in these parcels with greater access will be developed and serviced sooner than those areas further from existing infrastructure. As a result, development and infrastructure costs are distributed evenly across Service Levels 3 and 4, with the Tin Wis reserve site entirely included in Level 2. Results from the infrastructure analysis of all three development scenarios on Tla-o-qui-aht First Nation lands are shown in **Tables 73-75.**

Tla-o-qui-aht First Nation's lands have unique infrastructure considerations due to the possibilities for servicing. The sites could be connected to existing infrastructure due to their proximity to municipal servicing in the District of Tofino or, should the Nation choose, could be serviced through on-site water and wastewater systems. For the purposes of this study, it was assumed that all Tla-o-qui-aht First Nation lands would connect to municipal infrastructure and incur costs between $16.6m and $20.9m. Ultimately, the servicing strategy for these sites will determine the costs to the Nation. The broader implications of how these parcels are serviced will include cost-sharing between the District and Tla-o-qui-aht First Nation to develop the new water and wastewater facilities required in Tofino.

Table 73: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario, Tla-o-qui-aht First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	150	194	194	-	-
Small Lot Single-Family	-	97	54	54	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	120,336	54,390	54,390	-	-
Commercial (Low-Density)	-	31,403	-	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	903	803	803	-	-
Service Cost ($)	-	$6,579,031	$5,016,942	$5,016,942	-	-

Table 74: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario, Tla-o-qui-aht First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	117	147	147	-	-
Small Lot Single-Family	-	116	102	102	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	295,061	163,169	163,169	-	-
Commercial (Low-Density)	-	62,806	-	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	1,084	931	931	-	-
Service Cost ($)	-	$6,708,115	$5,118,626	$5,118,626	-	-

Table 75: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario, Tla-o-qui-aht First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	85	90	90	-	-
Small Lot Single-Family	-	116	125	125	-	-
Townhouse	-	-	51	51	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	409,619	244,753	244,753	-	-
Commercial (Low-Density)	-	133,058	38,850	38,850	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	1,172	1,054	1,054	-	-
Service Cost ($)	-	$8,304,046	$6,321,821	$6,321,821	-	-

7.3.5 TOQUAHT FIRST NATION

As previously discussed, development projected for Toquaht First Nation lands is focused on the Secret Beach development. Since this project is in advanced stages, the land use at Secret Beach was all considered to be in Service Level 1 in all three development scenarios. These lands are the only sites included in Level 1 outside of Tofino and Ucluelet.

Servicing infrastructure for the development will all be contained on site and therefore the associated costs are not considered for the purposes of this study. Results from the infrastructure analysis of all three development scenarios on Toquaht First Nation lands are shown in **Tables 76-78**

Table 76: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario, Toquaht First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	88	-	-	-	-	-
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	17,868	-	-	-	-	-
Commercial (Low-Density)	1,076	-	-	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	285	-	-	-	-	-
Service Cost ($)	-	-	-	-	-	-

Table 77: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario, Toquaht First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	150	-	-	-	-	-
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	35,736	-	-	-	-	-
Commercial (Low-Density)	2,153	-	-	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	492	-	-	-	-	-
Service Cost ($)	-	-	-	-	-	-

Table 78: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario, Toquaht First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	250	-	-	-	-	-
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	-	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	53,604	-	-	-	-	-
Commercial (Low-Density)	3,229	-	-	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	813	-	-	-	-	-
Service Cost ($)	-	-	-	-	-	-

7.3.6 UCLUELET FIRST NATION

The land development projects on Ucluelet First Nation lands are typically un-serviced or underserviced, with some sites assumed to be too far or small to be serviced over the long-term. As such, Ucluelet First Nation's lands are included in Service Levels 3 to 6 in the three development scenarios. The largest development proposed by the Nation, along the Tofino-Ucluelet Highway, is included in Level 3 and account for the most of Nation's projected residential, commercial, and tourism commercial land uses. Results from the infrastructure analysis of all three development scenarios on Ucluelet First Nation lands are shown in **Table 79-81.**

Infrastructure costs related to servicing Ucluelet First Nation's lands was varied depending on location and the land use envisioned for the site. It was assumed that the sites included in Service Levels 5 and 6 would be serviced on-site due to the nature of the parcels. Therefore, the total cost of servicing Ucluelet First Nation lands was between $3.6m and $7.9m in the three development scenarios.

Table 79: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario, Ucluelet First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	-	-	-	-	-
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	20	-	-	-
Multi-Family Residential	-	-	-	-	-	-
Tourism Commercial	-	-	35,736	-	-	-
Commercial (Low-Density)	-	-	84,000	-	-	-
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	-
Institutional	-	-	-	-	-	-
Population Equivalents	-	-	150	-	-	-
Service Cost ($)	-	-	$3,581,623	-	-	-

Table 80: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario, Ucluelet First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	-	-	20	-	-
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	30	-	-	-
Multi-Family Residential	-	-	10	-	-	-
Tourism Commercial	-	-	35,736	-	-	-
Commercial (Low-Density)	-	-	84,000	-	1,076	2,691
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	56,628
Institutional	-	-	-	-	-	-
Population Equivalents	-	-	170	60	1	50
Service Cost ($)	-	-	$3,669,529	$2,745,820	-	-

Table 81: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario, Ucluelet First Nation.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	-	-	-	40	-	-
Small Lot Single-Family	-	-	-	-	-	-
Townhouse	-	-	40	-	-	-
Multi-Family Residential	-	-	15	-	-	-
Tourism Commercial	-	-	35,736	-	-	-
Commercial (Low-Density)	-	-	84,000	-	1,076	4,306
Commercial (High-Density)	-	-	-	-	-	-
Light Industrial	-	-	-	-	-	-
Heavy Industrial	-	-	-	-	-	-
Industrial Park	-	-	-	-	-	84,942
Institutional	-	-	-	-	-	-
Population Equivalents	-	-	190	120	1	75
Service Cost ($)	-	-	$4,523,581	$3,384,889	-	-

7.4 REGIONAL SUMMARY OF INFRASTRUCTURE ANALYSIS

Understanding the infrastructure implications of developing vacant and underutilized lands is critical to establishing how land use development will most feasibly occur. Infrastructure analysis focused on estimating the required infrastructure and subsequent costs of servicing these lands across the Region Land use supply was therefore allocated to the six Service Levels defined for the purposes of this Study to determine the level of service and investment required to achieve full buildout of each land use scenario. Throughout the three scenarios, several consistent trends were identified:

- Total costs to service all vacant and underutilized lands throughout the Region range from $97.3m in the low development scenario to $125.2m in the high scenario, before accounting for improvements to existing infrastructure capacity.
- Lands that are already serviced, or Service Level 1, remain the areas wherein the most growth in land use and population could occur.
- Costs are highest to service areas with some existing infrastructure (Service Level 2) and those lands that will only be serviced in the long-term (Service Level 5).
- High-density commercial uses are exclusively Service Level 1.
- Potential heavy industrial uses are in areas that are unlikely to or will never be serviced (Service Level 5 or 6) and therefore should be reliant on on-site services.

Results from the infrastructure analysis of all three development scenarios throughout the West Coast Region are shown in **Table 82-84**

Table *82*: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario for the West Coast Region.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	774	403	268	299	323	19
Small Lot Single-Family	273	253	127	150	224	-
Townhouse	499	46	159	13	124	-
Multi-Family Residential	427	-	-	-	-	-
Tourism Commercial	276,770	319,446	328,948	197,586	97,437	-
Commercial (Low-Density)	242,563	50,227	118,389	-	8,713	-
Commercial (High-Density)	358,822	-	-	-	-	-
Light Industrial	248,780	133,660	18,708	458,262	-	-
Heavy Industrial	-	-	-	-	35,404	-
Industrial Park	288,774	381,886	53,453	-	-	
Institutional	49,483	24,090	17,587	-	13,999	-
Population Equivalents	6,063	2,902	2,039	1,978	2,041	57
Service Cost ($)	-	$30,400,572	$20,162,523	$16,288,711	$30,477,278	-

Table 83: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario for the West Coast Region.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	725	299	192	249	252	48
Small Lot Single-Family	366	334	194	186	336	-
Townhouse	485	119	167	124	122	-
Multi-Family Residential	658	-	132	62	111	-
Tourism Commercial	377,749	593,727	514,629	377,964	146,155	-
Commercial (Low-Density)	535,204	119,279	152,778	15,992	18,503	2,691
Commercial (High-Density)	538,233	-	-	-	-	-
Light Industrial	466,610	274,958	38,486	687,392	-	-
Heavy Industrial	-	-	-	-	70,807	56,628
Industrial Park	221,891	305,509	42,762	-	-	-
Institutional	58,089	32,120	23,449	-	18,666	-
Population Equivalents	7,155	3,402	2,457	2,658	2,422	194
Service Cost ($)	-	$31,061,780	$20,721,717	$19,057,968	$31,351,280	-

Table *84*: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario for the West Coast Region.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	780	217	121	221	186	77
Small Lot Single-Family	299	341	200	226	401	-
Townhouse	508	232	231	167	222	-
Multi-Family Residential	994	-	259	124	150	-
Tourism Commercial	395,617	708,284	596,214	459,548	146,155	-
Commercial (Low-Density)	563,902	208,355	191,628	70,833	18,503	4,306
Commercial (High-Density)	588,759	-	-	-	-	-
Light Industrial	508,105	366,611	51,314	916,523	-	-
Heavy Industrial	-	-	-	-	106,211	84,942
Industrial Park	152,733	152,755	21,381	-	-	-
Institutional	64,543	40,151	29,311	-	23,332	-
Population Equivalents	7,732	3,558	2,694	3,202	2,709	306
Service Cost ($)	-	$38,340,373	$25,518,559	$23,236,335	$38,082,194	-

7.5 LAND USE SUPPLY AND DEMAND COMPARISON BY SERVICE LEVEL

Having attributed one of six Service Levels to the estimated regional land use supply under each land use scenario, it is important to understand how supply relates to projected land use demand on the West Coast. Using the land use demand estimates from **Section 4.0**, this section identifies at what Service Level land use demand is met in each land use scenario. From a regional perspective, this analysis shows how infrastructure costs will change as more land is developed to adjust to the market and the extent to which efficient growth can be achieved through coordinated development on easily serviced lands.

Projected demand for the land uses identified in **Section 4.0** are summarized in **Table 85,** shown below. Note that the estimates for industrial land, previously expressed in acres, and tourism commercial, previously expressed in accommodation units, have been adapted to reflect area measures used in developing the land use growth estimates.

Table *85*: Summary of total projected land use demand in the West Coast Region by 2050

LAND USE	DEMAND ESTIMATE		
	LOW	MEDIUM	HIGH
Single-Family Residential (All)	918 units	1,007 units	1,768 units
Townhouse	230 units	682 units	442 units
Multi-Family Residential	306 units	909 units	589 units
Tourism Commercial	1,242,725 sq. ft.	3,151,035 sq. ft.	6,060,851 sq. ft.
Commercial (Low-Density)	39,693 sq. ft.	49,033 sq. ft.	64,209 sq. ft.
Commercial (High-Density)	130,307 sq. ft.	160,967 sq. ft.	210,791 sq. ft.
Light Industrial	179,473 sq. ft.	430,734 sq. ft.	1,025,558 sq. ft.
Heavy Industrial	7,812 sq. ft.	21,874 sq. ft.	78,123 sq. ft.
Industrial Park	62,498 sq. ft.	87,497 sq. ft.	208,327 sq. ft.

Results from this analysis of all three development scenarios on throughout the West Coast Region are shown in **Table 86-88**.

These tables sum the land use supply for each Service Level to show how supply progresses from Level 1 through 6. Therefore, the value shown in Level 6 is the total projected supply for that land use in that supply. In each table, the **bolded red** values indicate where total supply for each land use meets or exceeds projected demand. Where supply never meets demand for this land use scenario, no bolded value is provided.

The comparison between project supply and demand revealed certain trends that could influence future land use decisions.

- Demand for tourism commercial uses is never met in any of the land use scenarios. In the medium and high scenarios demand exceeds supply by over one million square feet.

- Through all three scenarios, demand for residential uses is met by the Service Level 3, except multi-family residential in the medium scenario which extends to Level 5.
- Demand for both low- and high-density commercial uses is met in the Service Level 1 in all three scenarios.
- Meeting demand for industrial uses produced variable results, with industrial park demand consistently met in the first two Service Levels, demand for heavy industrial met in Level 5 when the first lands eligible for this type of development are introduced, and light industrial supply matching demand between Level 2 and 4.

Table *86*: Summary of infrastructure analysis on vacant and underutilized lands in the low development scenario for the West Coast Region.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	**774**	1,177	1,445	1,744	2,067	2,086
Small Lot Single-Family	**273**	526	653	803	1,027	1,027
Townhouse	**499**	544	704	717	842	842
Multi-Family Residential	**427**	427	427	427	427	427
Tourism Commercial	276,770	596,216	925,164	1,122,751	1,220,187	1,220,187
Commercial (Low-Density)	**242,563**	292,790	411,179	411,179	419,893	419,893
Commercial (High-Density)	**358,822**	358,822	358,822	358,822	358,822	358,822
Light Industrial	248,780	382,441	401,149	**859,411**	859,411	859,411
Heavy Industrial	-	-	-	-	**35,404**	35,404
Industrial Park	**288,774**	670,660	724,113	724,113	724,113	724,113
Institutional	49,483	73,573	91,160	91,160	105,159	105,159
Population Equivalents	6,063	8,965	11,005	12,982	15,024	15,081
Service Cost ($)	-	$30,400,572	$50,563,095	$66,851,806	$97,329,084	$97,329,084

Table 87: Summary of infrastructure analysis on vacant and underutilized lands in the medium development scenario for the West Coast Region.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	**725**	1,024	1,216	1,465	1,717	1,765
Small Lot Single-Family	**366**	700	894	1,080	1,416	1,416
Townhouse	485	604	**771**	896	1,018	1,018
Multi-Family Residential	658	658	780	842	**953**	953
Tourism Commercial	377,749	971,476	1,486,105	1,864,069	2,010,224	2,010,224
Commercial (Low-Density)	**535,204**	654,482	807,261	823,252	841,755	844,446
Commercial (High-Density)	**538,233**	538,233	538,233	538,233	538,233	538,233
Light Industrial	466,610	**741,569**	780,054	1,467,447	1,467,447	1,467,447
Heavy Industrial	-	-	-	-	**70,807**	127,435
Industrial Park	**221,891**	527,400	570,162	570,162	570,162	570,162
Institutional	58,089	90,209	113,658	113,658	132,324	132,324
Population Equivalents	7,155	10,557	13,014	15,672	18,094	18,287
Service Cost ($)	-	$31,061,780	$51,783,497	$70,841,465	$102,192,745	$102,192,745

Table 88: Summary of infrastructure analysis on vacant and underutilized lands in the high development scenario for the West Coast Region.

LAND USE	SERVICE LEVEL					
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6
Large Lot Single-Family	780	998	**1,119**	1,340	1,527	1,604
Small Lot Single-Family	299	640	**840**	1,066	1,467	1,467
Townhouse	**508**	740	970	1,137	1,359	1,359
Multi-Family Residential	**994**	994	1,237	1,361	1,511	1,511
Tourism Commercial	395,617	1,103,902	1,700,116	2,159,664	2,305,819	2,305,819
Commercial (Low-Density)	**563,902**	772,257	963,885	1,034,718	1,053,222	1,057,527
Commercial (High-Density)	**588,759**	588,759	588,759	588,759	588,759	588,759
Light Industrial	508,105	874,716	926,030	**1,842,554**	1,842,554	1,842,554
Heavy Industrial	-	-	-	-	**106,211**	191,153
Industrial Park	152,733	**305,488**	326,869	326,869	326,869	326,869
Institutional	64,543	104,694	134,005	134,005	157,337	157,337
Population Equivalents	7,732	11,290	13,985	17,187	19,896	20,201
Service Cost ($)	-	$38,340,373	$63,858,932	$87,095,267	$125,177,461	$125,177,461

8.0 BUILDOUT SCENARIO TESTING

Having analyzed both possible growth scenarios and the infrastructure implications of new development on vacant and underutilized lands, it is important to understand how growth could be absorbed. Building on **Section 5.0** and **6.0**, this section outlines four possibilities in which the participating communities accommodate new development and balance their respective infrastructure capacity and economic development objectives. To assess these possibilities, four scenarios have been created based on the medium growth estimate that prioritize development in certain communities and on parcels with certain infrastructure characteristics. The four buildout scenarios are as follows:

1. Assessing the land use mix and development achieved only though the development of lands with existing services.
2. Directing development away from Tofino due to limitations on infrastructure capacity to other communities up to Service Level 2.
3. Prioritizing development on all First Nations lands and serviced lands in other jurisdictions up to Service Level 4.
4. Understanding the maximum growth that can be achieved with current land use supply.

The results of these scenarios are presented in the following sections, which describe the possible growth, potential costs, and identified gaps under the four conditions.

8.1 SCENARIO 1: BUILDOUT ON LANDS WITH EXISTING SERVICES

The first scenario considers what development can be achieved on only those lands with existing services, or Service Level 1. Since these lands are connected to existing infrastructure, it was assumed that these lands have no additional costs to service. Lands in Service Level 1 were identified in the Districts of Tofino and Ucluelet, along with those being developed by Toquaht First Nation.

Results from this scenario are largely consistent with the findings for the medium growth estimate in **Section 6.5**, which suggests that demand for most land uses will be satisfied through development on lands with existing services. These include demand for single-family residential, low- and high-density commercial, light industrial, and industrial park uses. Demand for townhouse, multi-family residential, tourism commercial, and heavy industrial uses would not be met until lands in higher service levels are developed. While this scenario assumes no additional infrastructure costs to accommodate this growth, it is known that this level of development in Tofino would require significant invest in the District's water and wastewater systems.

Full results for this scenario are outlined in **Table 89.**

Table *89*: Results of Buildout Scenario 1

LAND USE	MEDIUM SCENARIO	APPROXIMATE UNMET DEMAND
Large Lot Single-Family	**1,007 units**	
Small Lot Single-Family		
Townhouse	485 units	197 units
Multi-Family Residential	658 units	251 units
Tourism Commercial	672,810 sq. ft.	2,478,225 sq. ft.
Commercial (Low-Density)	**49,033 sq. ft.**	
Commercial (High-Density)	**160,967 sq. ft.**	
Light Industrial	**430,734 sq. ft.**	
Heavy Industrial	-	
Industrial Park	**87,497 sq. ft.**	
Institutional	**58,089 sq. ft.**	
Service Costs ($)	-	

8.2 SCENARIO 2: DIRECTING DEVELOPMENT OUTSIDE TOFINO

The second scenario anticipates that significant growth in Tofino will be challenging to achieve due to infrastructure limitations in the District. Therefore, growth in this scenario is limited in Tofino, with only infill properties being considered for development growth is instead directed towards the District of Ucluelet and Tla-o-qui-aht communities up to Service Level 2. Despite being within the boundary of the District of Tofino, Tla-o-qui-aht communities are still considered under this scenario should growth be facilitated by on-site servicing rather than connection to municipal services.

Again, demand for most land uses will be satisfied through development on lands infill lands in Tofino along with lands up to Service Level 2 in Ucluelet and Tla-o-qui-aht communities. These include demand for single-family residential, low- and high-density commercial, light industrial, and industrial park uses. Like the previous scenario, demand for townhouse, multi-family residential, tourism commercial, and heavy industrial uses would not be met until lands in higher service levels are developed. Infrastructure requirements for the Service Level 2 properties included in this scenario will cost approximately $8.5m.

Full results for this scenario are outlined in **Table 90**, results that are coloured red and bold indicate that demand was satisfied for that land use.

Table *90:* Results of Buildout Scenario 2

LAND USE	MEDIUM SCENARIO	APPROXIMATE UNMET DEMAND
Large Lot Single-Family	**1,007 units**	
Small Lot Single-Family		
Townhouse	449 units	233 units
Multi-Family Residential	658 units	251 units
Tourism Commercial	672,810 sq. ft.	2,478,225 sq. ft.
Commercial (Low-Density)	**49,033 sq. ft.**	
Commercial (High-Density)	**160,967 sq. ft.**	
Light Industrial	**430,734 sq. ft.**	
Heavy Industrial	-	
Industrial Park	**87,497 sq. ft.**	
Institutional	**58,089 sq. ft.**	
Service Costs ($)	**$8.5 M**	

8.3 SCENARIO 3: DIRECTING DEVELOPMENT TOWARDS FIRST NATIONS

The third scenario considers possible growth should development be focused on First Nations lands in the West Coast Region. For the purposes of this analysis, it was assumed that growth would be first be absorbed on First Nations lands up to Service Level 4, with remaining demand being allocated to Service Level 1 areas in the municipalities.

Like the previous scenarios, demand for many land uses is met or exceeded by the lands supplied. These include demand for single-family residential, low- and high-density commercial, light industrial, and industrial park uses. Again, demand for townhouse, multi-family residential, tourism commercial, and heavy industrial uses would not be met until lands in higher service levels or in other participating communities are developed. Due to the need for significant infrastructure upgrades for many of the parcels considered in this scenario, infrastructure costs are higher, totalling an estimated $23.4m.

Full results for this scenario are outlined in **Table 91,** results that are coloured red and bold indicate that demand was satisfied for that land use.

Table 91: Results of Buildout Scenario 3

LAND USE	MEDIUM SCENARIO	APPROXIMATE UNMET DEMAND
Large Lot Single-Family	**1,007 units**	
Small Lot Single-Family		
Townhouse	476 units	206 units
Multi-Family Residential	668 units	241 units
Tourism Commercial	1,034,885 sq. ft.	2,116,150 sq. ft.
Commercial (Low-Density)	**49,033 sq. ft.**	
Commercial (High-Density)	**160,967 sq. ft.**	
Light Industrial	**430,734 sq. ft.**	
Heavy Industrial	-	
Industrial Park	**87,497 sq. ft.**	
Institutional	**58,089 sq. ft.**	
Service Costs ($)	**$23.4 M**	

8.4 SCENARIO 4: MAXIMUM BUILDOUT OF LAND SUPPLY

The final scenario analyzes how maximum land use demand can be absorbed in the West Coast Region's vacant and underutilized lands. Similar to the first scenario, this scenario distributed growth in the participating communities by service level, with lands with a higher level of servicing being developed first until projected demand was met.

The medium growth estimate suggests that demand will be met for all uses except tourism commercial. In Service Level 1, single-family residential, low- and high-density commercial, light industrial, and industrial park uses are met. Townhouse demand is satisfied in Service Level 3, while demand for multi-family residential and heavy industrial uses is met in Level 5. Again, demand for tourism commercial uses will never be met in the medium growth scenario, with an estimated shortfall of 1,140,811 sq. ft. Projected infrastructure costs for this scenario under the medium growth estimate are approximately $48.5m.

Full results for this scenario are outlined in **Table 92**, results that are coloured red and bold indicate that demand was satisfied for that land use.

Table *92*: Results of Buildout Scenario 4

LAND USE	MEDIUM SCENARIO	APPROXIMATE UNMET DEMAND
Large Lot Single-Family	**1,007 units**	
Small Lot Single-Family		
Townhouse	**682 units**	
Multi-Family Residential	**909 units**	
Tourism Commercial	2,010,224 sq. ft.	1,140,811 sq. ft.
Commercial (Low-Density)	**49,033 sq. ft.**	
Commercial (High-Density)	**160,967 sq. ft.**	
Light Industrial	**430,734 sq. ft.**	
Heavy Industrial	**21,874 sq. ft.**	
Industrial Park	**87,497 sq. ft.**	
Institutional	**58,089 sq. ft.**	
Service Costs ($)	**$48.5 M**	

9.0 RECOMMENDATIONS

In an environment of rising housing costs and employment that is dominated by lower paying service jobs, new industrial employment especially, will allow people a more equitable opportunity to live and work on the West Coast. In addition to producing diversified tax revenues, industries that provide meaningful local employment reduce carbon emissions related to residents commuting outside the region for better paying work. Local high-paying jobs also add to the social cohesion of communities.

Based on the projected demand for industrial and commercial lands, and potential capacity of vacant industrial and commercial lands on the West Coast the following recommendations emerged. These were based on both our in-depth analysis and discussions held with local government staff, industry members, regional economic development advisors and First Nations representatives. The recommendations provide an action plan for improving processes related to industrial and commercial land development, creating sector growth, and forming partnerships that will open up new employment opportunities. Its also important to understand that Industrial and Commercial demand will be influenced by population growth and residential development would need to accompany new industrial and commercial developments to allow for staff housing. Therefore, a key consideration for each recommendation provided below is the role of housing and the need for sufficient housing supply and affordability to support a growing workforce.

1. Develop a Regional Strategy for Sustainable Growth

- This strategy will exist to facilitate cooperation between communities and in order to ensure future development on the West Coast occurs in a sustainable and coordinated manner, including:
    - working to ensure that future growth respects the unique environmentally sensitive nature of the West Coast;
    - creating viable and sustainable economic development opportunities for all community partners;
    - balancing opportunities for economic growth with the land supply and environmental & infrastructure constraints of the Region;
    - ensuring future growth respects the carrying capacity of the region's environment and infrastructure by preventing over development;
    - understanding how much residential development and growth can be supported and at what pace within the two Districts, ACRD and First Nations lands; and
    - Coordinating development policies and procedures between communities and jurisdictions.
- To support the implementation of a Regional Strategy for Sustainable Growth a working group should be established with staff representatives from local governments, Parks Canada, and First Nations communities on the West Coast. The This working group would serve a regional function and could potentially be part of the ACRD's economic development support.
- The working group should be created through the West Coast Committee and the working group should update the West Coast Committee of its key initiatives on a regular basis.
- The working group should also establish a West Coast Industry Advisory Panel made up of industry leaders and landowners to help guide commercial and industrial economic

development efforts and explore the potential of emerging economic sectors in the region by participating in business attraction strategies.

2. Develop policies that support the coordinated development of existing industrial and commercial lands between jurisdictions

- A coordinated, inter-jurisdictional approach could determine which areas of the region are best suited to house particular industry sectors.
- One critical aspect of this Industrial and Commercial Land Strategy process has been the engagement of First Nations in exploring issues and opportunities related to industrial and commercial land development on the West Coast. In particular, the Ucluelet and Tla-o-qui-aht First Nations have the potential to open up new industrial lands if these lands can be serviced in partnership with local government and provincial partners.
- A coordinated, inter-jurisdictional approach could determine which areas of the region are best suited to house particular industry sectors.
- Discourage the conversion of appropriately zoned industrial land to non-industrial uses.
- Discourage development permit guidelines that impose unnecessary development standards.
- Support the development of innovative agreements for commercial and industrial lands in order to meet servicing requirements.
- Both Tofino and Ucluelet are both currently undertaking OCP reviews. As information is amended, a shared communications plan could be implemented.
- Across the region, existing regulations could be simplified to be less prescriptive regarding the types of uses allowed on industrial and commercial lands. Instead, the regulations should focus on potential impacts.
- Consolidate and make publicly available all regional GIS information with respect to ACRD and local government zoning bylaws, to make it easier for various users to access this information. A joint research activity, undertaken by the Task Force identified under Recommendation #1, could be conducted on how to create, and share this data.
    - Local governments in the region should also track data in a similar approach, such as commercial and industrial inventory, to streamline future planning analyses.

3. Clarify Development Goals and Streamline the Development Approvals Process

- Improvements to the approvals process can include:
    - Enhanced communication with applicants, particularly with those new to the region or unfamiliar with the development process.
    - Straightforward, plain language application forms should be adopted across all jurisdictions.
- The Industrial and Commercial Land Use Strategy may provide a lens for coordinated zoning for targeted sectors to simplify land use regulations for investors.

4. Review Opportunities to Coordinate Service Delivery and Revenue Sharing Between Jurisdictions

- Explore the potential for regional revenue sharing agreements in order to open up more serviced Commercial and Industrial lands.
- Review opportunities for interjurisdictional servicing of industrial and commercial lands, notably:
    - Coordination of infrastructure development and servicing between the District of Ucluelet, Ucluelet First Nation (Highway and Port Albion Road Intersection) and the ACRD in Millstream);
    - Coordination of infrastructure development, and water and sewer servicing between District of Tofino and Tla-o-qui-aht First Nation;
    - Extension of water infrastructure operated by Parks Canada from Highway 4 to the airport lands in the ACRD.
- First Nations and local municipalities should explore opportunities to share infrastructure costs to achieve greater access to multiple funding streams from senior government available to different jurisdictions. First Nations often have access to additional federal funding streams that significantly reduce the cost of shared infrastructure projects.
- In order to encourage economic growth, local governments and First Nations should evaluate the benefits and risks of developing industrial and commercial lands themselves (or in partnership) because in some cases, the cost of acquiring lands and extending appropriate services cannot be quickly recovered by private developers.
- Consider further study into regional institutional lands to ensure that local emergency services, health care, and community recreational amenities are appropriate to the year-round and seasonal populations in the region.
    - Evaluate the potential for shared recreational amenities on the airport lands.
    - Assess the need for expanded emergency services with consideration for seasonal stresses on theses services.

5. Explore the Development Potential and Raise Awareness for Key Emerging Sectors

- Work with ICET to promote the West Coast region to businesses and sectors in other regions of BC to attract clients seeking relocation of expanded operations.
- Work with ICET to profile emerging industries on the West Coast and leverage success stories in attraction to generate increased awareness of the West Coast as a desirable location for business. This action should be coordinated with regional housing initiatives, as the success of attracting new businesses will have to be coordinated with improved housing options and affordability needed to support growth in the workforce.
- Through the work of the Task force, ICET and proposed Industry Advisory Panel, explore emerging industrial sectors and clusters such as Clean Tech, Marine Services and Manufacturing.
- Explore the potential for co-operative shipping arrangements, including shared warehousing opportunities for industrial and commercial businesses.
- Work with ICET to invest in data mining systems that would allow available West Coast commercial and industrial properties to be profiled.
- Emphasizing the link between well-paying local jobs and regional sustainability.

- Break down the stereotype that all industries have a detrimental environmental footprint. This area of endeavour may include emphasizing the leadership role that some industries play in shaping environmental practise and creating new clean technologies.

APPENDIX A

Growth Scenario Assumptions

GROWTH SCENARIO ASSUMPTIONS

Due to the high-level nature of this study, broad assumptions were made to inform the possible development intensities for residential, commercial, industrial, and institutional uses in the vacant and underutilized lands identified by the participating communities. The assumptions and rationale used to develop the low, medium, and high growth scenarios for land development are described in this section.

General Assumptions

One general assumption applied across all communities and scenarios were the proportions of land available for development after accounting for space occupied by infrastructure and the site-specific considerations like slope and environment conditions. Therefore, the following assumptions were used to approximate the amount of land available for development:

- For land that has had no previous development, it was assumed that 35% of the land area would be removed.
- For land that had previously been developed, it was assumed that 20% of the land area would be removed.

Population equivalencies for each community were also consistent and were applied as follows:

LAND USE	POPULATION EQUIVALENCY
Single-Family	3 / unit
Townhouse	2 / unit
Multi-Family Residential	1.5 / unit
Commercial	0.00084 / sq. ft.
Tourism Commercial	1 / unit
Industrial	0.00084 / sq. ft.
Institutional	0.00046 / sq. ft.

District of Tofino, District of Ucluelet, and Tla-o-qui-aht First Nation

The assumptions made for the growth scenarios in the District of Ucluelet and Tofino, and Tla-o-qui-aht First Nation were primarily based on the two municipalities' zoning bylaws, approximating the development intensities anticipated the three development scenarios. The same assumptions were also applied to Tla-o-qui-aht First Nation lands since the majority of their vacant and underutilized lands are within the District of Tofino.

Residential densities were assumed to be the following:

LAND USE	DENSITY
Large Lot Single-Family	8 upa (6 upa in underutilized lands in Ucluelet)
Small Lot Single-Family	12 upa
Townhouse	20 upa
Multi-Family Residential	35 upa

Commercial, industrial, and institutional densities in the Districts of Tofino and Ucluelet, along with Tla-o-qui-aht First Nation were assumed to be the following. Some uses having multiple unique densities to provide variation between the low, medium, and high scenarios.

LAND USE	DENSITY
Tourism Commercial (Campground)	• 35% lot coverage and 1 storey; • Used in areas specifically identified as campgrounds; • Between lot coverages within the Tourist Commercial District (C5) in Tofino and Tourist Commercial zone (CS-5) in Ucluelet.
Tourism Commercial (Low)	• 35% lot coverage and 2 storeys; • Between lot coverages within the Tourist Commercial District (C5) in Tofino and Tourist Commercial zone (CS-5) in Ucluelet.
Tourism Commercial	• 35% lot coverage and 3 storeys; • Between lot coverages within the Tourist Commercial District (C5) in Tofino and Tourist Commercia (CS-5) zone in Ucluelet.
Commercial (Low-Density) (Low Scenario)	• 50% lot coverage and 1 storey; • Approximate lot coverages within the Service Commercial (CS-2) zone in the Ucluelet Zoning Bylaw
Commercial (Low-Density)	• 50% lot coverage and 2 storeys;

LAND USE	DENSITY
	• Approximate lot coverages within the Service Commercial zone in the Ucluelet Zoning Bylaw
Commercial (High-Density) (Low Scenario)	• 75% lot coverage and 2 storeys; • Approximate lot coverages within the Core Commercial (C2-A) in Tofino and the Village (CS-1) Square Commercial zone in Ucluelet
Commercial (High-Density)	• 75% lot coverage and 3 storeys; • Approximate lot coverages within the Core Commercial (C2-A) in Tofino and the Village Square Commercial (CS-1) zone in Ucluelet
Light Industrial (Low)	• 35% lot coverage and 1 storey; • Low estimate of lot coverages within the Light Industrial District (M2) in Tofino.
Light Industrial	• 60% lot coverage and 1 storey; • Approximate lot coverages within the Light Industrial District (M2) in Tofino.
Industrial Park	• 50% lot coverage and 2 storeys; • Approximate lot coverages within the Industrial Park District (M1) in Tofino and the Service Industrial (I-2) zone in Ucluelet
Institutional (Low)	• For parcels with existing development – 15% increase in the existing floor area; • For vacant parcels – 30% lot coverage and 1 storey in accordance with lot coverages in the Limited Institutional (P-2) zone in Ucluelet.
Institutional (Medium)	• For parcels with existing development – 25% increase in the existing floor area; • For vacant parcels – 40% lot coverage and 1 storey in accordance with lot coverage in the Parks and Institutional (P1) zone in Tofino.
Institutional (High)	• For parcels with existing development – 35% increase in the existing floor area; • For vacant parcels – 50% lot coverage and 1 storey to average lot coverages in the Village Square Institutional (P-3) zone in Ucluelet and the Parks and Institutional (P1) Zone in Tofino.

Alberni Clayoquot Regional District

The growth scenario assumptions made for the Alberni-Clayoquot Regional District were primarily again primarily based on the regional district's zoning bylaws, approximating the development intensities anticipated the three development scenarios. Opposed to the assumptions detailed in Section 2.1, the rural or remote context of the majority of the ACRD's vacant or underutilized lands typically resulted in less intense development for residential uses, but similar assumptions for commercial and industrial uses.

Residential densities were assumed to be the following, based on current zones outlined in the Draft ACRD Zoning Bylaw:

LAND USE	LOW SCENARIO	MEDIUM SCENARIO	HIGH SCENARIO
Large Lot Single-Family	0.25 upa	0.5 upa	1 upa
Cottage Residential	1 upa	2 upa	3 upa
Two-Family Residential	1 upa	2 upa	3 upa
Salmon Beach Residential	5% increase in number of lots	12.5% increase in number of lots	20% increase in number of lots

Commercial, industrial, and institutional densities in the Alberni-Clayoquot Regional District were assumed to be the following, with some uses having multiple unique densities to provide variation between the low, medium, and high scenarios.

LAND USE	DENSITY
Commercial (Low-Density) (Medium Scenario)	• 40% lot coverage and 1 storey; • Lot coverages within the Commercial (C1) zone in the Draft ACRD Zoning Bylaw
Commercial (Low-Density) (High Scenario)	• 40% lot coverage and 2 storeys; • Lot coverages within the Commercial (C1) zone in the Draft ACRD Zoning Bylaw
Light Industrial (Low Scenario)	• 20% lot coverage and 1 storey; • Lot coverage within the Light Industrial (I1) zone in the Draft ACRD Zoning Bylaw
Light Industrial (Medium Scenario)	• 30% lot coverage and 1 storey; • Lot coverage within the Light Industrial (I1) zone in the Draft ACRD Zoning Bylaw

Light Industrial (High Scenario)	• 40% lot coverage and 1 storey; • Lot coverage within the Light Industrial (I1) zone in the Draft ACRD Zoning Bylaw
Heavy Industrial (Low Scenario)	• 10% lot coverage and 1 storey; • Lot coverage within the Heavy Industrial (I4) zone in the Draft ACRD Zoning Bylaw
Heavy Industrial (Medium Scenario)	• 20% lot coverage and 1 storey; • Lot coverage within the Heavy Industrial (I4) zone in the Draft ACRD Zoning Bylaw
Heavy Industrial (High Scenario)	• 30% lot coverage and 1 storey; • Lot coverage within the Heavy Industrial (I4) zone in the Draft ACRD Zoning Bylaw