

ECONOMIC DEVELOPMENT STRATEGY

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Executive Summary

Background

The City of Langley has commissioned Lions Gate Consulting to prepare the City's Economic Development Strategy, building upon the City's strengths and determining what economic opportunities should be targeted and how best to pursue them. The intent of this Plan is to identify a clear set of goals, objectives and specific actions to further enhance the City of Langley as The Place To Be ... for Economic Development.

Planning Context

The City and the Department of Development Services and Economic Development have implemented most of the previous economic development strategy (2011) and made substantive improvements to services and programming. Recommendations made in the *Corporate Strategic Plan*, *Regional Growth Strategy*, *Official Community Plan*, *Sustainability Framework*, *Downtown Master Plan*, and the *Brownfield Redevelopment Strategy* were considered in the preparation of this strategy. Plans setting out specific economic development programs (i.e. Downtown Business Action Plan 2014, Industrial Business Attraction Study 2015, Business Retention and Recruitment Strategy 2016) were also reviewed and aligned in this report's recommendations.

Key Community Trends

- The City's population has grown steadily over the last 15 years, although the rate of expansion was less than half that of Metro Vancouver. Looking ahead 25 years, the reverse will occur—local population will significantly exceed that projected for BC and in line with growth in Metro Vancouver.
- The City's labour force has gradually been moving away from goods-producing occupations toward service occupations. Goods production, including manufacturing and construction activities, contributes one in five jobs locally.
- Housing starts, building permit values and business licence activity all underline the City's continued evolution as a Regional City Centre.
- The industrial and manufacturing industries in Langley are diverse, providing residents with well-paying employment. Land use and infrastructure are key inputs for these businesses, but it is also recognized that heavy industry and manufacturing are steadily declining within the community's economic base.
- The retail and commercial sectors (e.g. retail, wholesale, personal, business and other services) are the leading (and growing) contributors to the community's job base.

- The downtown continues to experience change driven by shifting development patterns and changing consumer preferences. Challenges include maintaining relevancy as a shopping district and cultural/civic centre. Strategic infrastructure additions to downtown, such as the Timms Community Centre and McBurney Lane, have brought new life to and complemented the central shopping core.
- The community's post-secondary institutions represent a locus of economic activity and have potential for further, productive community partnerships.

Interview Program Results

A total of 26 stakeholders were interviewed for their views on the local economic issues and opportunities for future economic development in the City. Dominant themes included:

- Property and street fragmentation (e.g. sidewalk and curb edge conditions)
- Absentee landlords
- Homelessness and anti-social behaviour that is adversely affecting downtown
- Downtown development potential
- Transit issues and future rapid transit needs and opportunities
- Expansion of post-secondary institutions
- Preservation of industrial land base

Economic Development Goals

The following four economic development goals were identified based on a review of other City of Langley plans and feedback obtained during the interview program.

1. A distinctive, vibrant downtown.
2. A diversified base of employment land.
3. Targeted development in emerging economic sectors.
4. Leveraged sector and institutional partnerships.

Strategic Initiatives

The strategy has been structured around four themes: place making, place building, business care and creative economy. Strategies are listed in Table ES-1 and ES-2.

The following strategy has been structured around the following four themes:

- **Place Making** – marketing and investment attraction.
- **Place Building** – land use, municipal services and public infrastructure.
- **Business Care** – business retention, expansion and facilitation.

- **Creative Economy** – emerging opportunities in arts, culture, education and technology.

Table ES-1: Strategy Recommendations

Theme	Strategy
Place Making	<ul style="list-style-type: none"> • Community Profile/Site Selector Profile • Sector Profiles • Research • Website as a business attraction tool • GIS data access • Trade show and conference participation • Trade missions • Destination retail stores • Downtown anchor tenant
Place Building	<ul style="list-style-type: none"> • Tax incentives • Development cost Charges • Relationship building in the local area • Downtown Master Plan • Streetscape upgrades • Control of undesirable uses • Downtown building scheme • Provisions for absentee landlords
Business Care	<ul style="list-style-type: none"> • Business support • Business Retention and Expansion • Business Walks Program • Job Fairs • Downtown walking tour • Night market • McBurney Plaza programming and events
Creative Economy	<ul style="list-style-type: none"> • Performing Arts Centre • Education summit • Innovation hub • KPU Tech Campus • Future rapid transit services • Strategic land assembly • Fibre optic network

Summary

Each strategy is prioritized according to a high, medium and flex ranking. All strategies are considered important but differ in their ranking due to factors such as cost, degree of local control over implementation and the duration of the program/project.

Table ES-3: Summary of Strategies by Priority

Priority	Number of Initiatives	Project Costs
High	10	\$225,000
Medium	10	\$75,000
Flex	11	\$80,000
Total	31	\$380,000

High: top priority for implementation

Medium: second order priority, suitable for implementation if resources and time allow and partners motivated

Flex: third order priority, best suited for partial implementation if resources and time allow, but can be deferred

Note: Project costs are direct cash costs; recurring costs are annualized

The implementation horizon for the strategy is six years with initiatives allocated to one of three two-year schedule slots. Many initiatives are ongoing services and will occur throughout the implementation period.

Table ES-4: Summary of Strategies by Year

	Number of Initiatives	Project Costs
2017-2018	19	\$230,000
2019 – 2020	25	\$120,000
2021 - 2022	19	\$30,000
Total	64	\$380,000

Note: Many initiatives occur in multiple years, therefore sum of initiatives will exceed the total

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1 Introduction

1.1 Background

The City of Langley's mission is to help existing businesses flourish and invite new businesses to join a thriving community. With a primary goal of eliminating red tape, the City is committed to providing "one-stop shopping" for current and prospective businesses.

An Economic Development Strategy was prepared in 2012 and since that time the majority of initiatives have been implemented by the Development Services and Economic Development Department in step with a growing community and evolving economic base. The Department has elected to commission an update of the strategy so the community is able to target emerging opportunities for economic, business and community development and determine how best to pursue them. The intent of this Plan is to identify a clear set of goals, objectives and specific actions to further enhance the City of Langley as The Place To Be ... for Economic Development.

1.2 Objectives of the Study

The purpose of the study is to review and update strategies and recommendations of the 2012 plan, including:

- demographic, economic and sector analyses;
- barriers and constraints;
- economic development goals;
- strategies for business investment, retention and expansion;
- coordination with existing corporate and departmental policies, goals and objectives of the City.

The study and its recommendations are scoped within the context of existing resource and budget commitments of the Department, with any new initiatives supported with external funds.

1.3 Methodology

The demographic, economic and sector updates were based on a review of government and industry publications and data obtained from statistical agencies. A socio-economic profile is presented in Appendix 1, while all cited literature is noted in Chapter 5.

Personal interviews were conducted in April and May 2016 with 26 key informants for their insights on economic development issues and opportunities in the City of

Langley. They are listed in Appendix 2. A planning workshop was also held with Council on June 13, 2016 for the purpose of reviewing, amending and prioritizing draft content and providing future direction on implementation.

1.4 Report Outline

The outline of this report is as follows:

Chapter 2 describes the context for economic development planning with reference to planning and other studies and how they are related to this document. An overview of the major economic development issues and considerations as determined from the analysis of the community's socio-economic structure and the feedback obtained through the interview program with community stakeholders is also provided.

Chapter 3 presents strategy recommendations in four major areas, place making, place building, business care and the creative economy. Reference is also made to monitoring and evaluation of the Strategy.

Supporting research, including a socio-economic profile, is presented in the appendices.

2 Planning Context

The City has made substantial progress building its economic development service capacity over the last decade, completing many strategic projects, building its marketing programs and adapting its efforts in accordance with higher level plans from the City and Metro Vancouver. This chapter describes the planning context as it relates to economic development, with reference to the current economic situation, the City's marketing resources and the status of other civic planning processes that will impact economic development services.

2.1 What is economic development?

It is not possible, within a single definition, to capture all the facets of economic development. It is usually described either in terms of objectives such as employment creation, wealth creation and quality of life, or as a process which tries to shape and encourage growth, competitiveness, sustainability and the overall economic well being of a community.

The broadest concept of economic development encompasses three major policy areas:

- Macro-economic policies (e.g. inflation, taxation, human resource development).
- Infrastructure policies.
- Policies directed at improving the business climate.

What is common amongst all definitions is the implied, and in some cases explicitly recognized, role of government, as it is responsible for creating the environment in which economic development occurs. Economic development is fundamentally about enhancing the factors of productive capacity - land, labour, capital, and technology - of a national, provincial or local economy. By using its resources and powers to reduce the risks and costs which could prohibit investment, the public sector often has been responsible for setting the stage for employment-generating investment by the private sector.

There is no single strategy, policy or program direction for achieving success in economic development. The unique mix of geographic, political, economic and social attributes of a region will present a distinctive set of challenges, and require different solutions, for economic development to be successful. (IEDC 2012)

2.2 Why Undertake An Economic Development Strategy?

The Economic Development Strategy describes a roadmap for the City and its partners illustrating how they can collaborate on employment, investment and quality

of life initiatives. The strategy is based on the premise that the community can develop local visions and goals and apply local resources to achieve them.

For the City of Langley, there are a number of motivating factors for a new Economic Development Strategy. They include:

- updating the 2012 Strategy;
- aligning with economic development goals, objectives and priorities set forth in the OCP and Corporate Strategic Directions plan;
- re-positioning the community in light of new socio-economic conditions and anticipated future needs;
- forming new partnerships and alliances;
- recognizing linkages between the local economy and municipal finance needs; and,
- acknowledging and responding to the competitive nature of investment attraction.

2.3 Related Civic Plans

The City has initiated or participated in higher level plans that give direction for economic development planning. Recommendations made in the following five plans, the Corporate Strategic Plan, Regional Growth Strategy, Official Community Plan, Sustainability Framework, Downtown Master Plan and Brownfield Redevelopment Strategy, were considered in the preparation of this strategy.

2.3.1 Corporate Strategic Plan

The *Corporate Strategy* (2013-17) outlines seven focus areas including infrastructure, quality of life, communication, revitalization, environment, protective services and organization development (City of Langley 2012). Economic development is threaded through many of these focus areas, specifically in regards to infrastructure, revitalization and the environment. The following key actions are in support of economic development:

- A Master Transportation Plan;
- Parks and Trail Network Plan;
- Way Finding Strategy;
- Urban Farm along the BC Hydro right-of-way;
- Downtown Master Plan Public Realm; and
- Special events and trip generators for attracting more visitors downtown.

2.3.2 Regional Growth Strategy

The Regional Growth Strategy is structured around five key goals supported by a number of strategies and policies to be implemented by Metro Vancouver, member municipalities and other levels of government (Metro Vancouver 2015).

Goal 1 - Create Compact Urban Area

Metro Vancouver's growth is concentrated in compact communities with access to a range of housing choices, and close to employment, amenities and services. Compact transit-oriented development patterns help reduce greenhouse gas emissions and pollution, and support both the efficient use of land and an efficient transportation network.

Goal 2 - Support A Sustainable Economy

The land base and transportation systems required to nurture a healthy business sector is protected and supported. This includes supporting regional employment and economic growth. Industrial and agricultural land is protected and commerce flourishes in Urban Centres throughout the region.

Goal 3 - Protect the Environment and Respond to Climate Change Impacts

Metro Vancouver's vital ecosystems continue to provide the essentials of life – clean air, water and food. A connected network of habitats is maintained for a wide variety of wildlife and plant species. Protected natural areas provide residents and visitors with diverse recreational opportunities. Strategies also help Metro Vancouver and member municipalities meet their greenhouse gas emission targets, and prepare for, and mitigate risks from, climate change and natural hazards.

Goal 4 - Develop Complete Communities

Metro Vancouver is a region of communities with a diverse range of housing choices suitable for residents at any stage of their lives. The distribution of employment and access to services and amenities builds complete communities throughout the region. Complete communities are designed to support walking, cycling and transit, and to foster healthy lifestyles.

Goal 5 – Support Sustainable Transit Choice

Metro Vancouver's compact, transit-oriented urban form supports a range of sustainable transportation choices. This pattern of development expands the opportunities for transit, multiple-occupancy vehicles, cycling and walking, encourages active lifestyles and reduces energy use, greenhouse gas emissions, household expenditure on transportation, and improves air quality. The region's

road, transit, rail and waterway networks play a vital role in serving and shaping regional development, providing linkages among the region's communities and providing vital goods movement networks. (Metro Vancouver 2011)

2.3.3 Official Community Plan

The *Official Community Plan* is a policy guide for managing land use and development in the City of Langley. Official Community Plan Bylaw, 2005, No. 2600 was adopted by Langley City Council on April 24, 2006, with ongoing amendments up to the present.

One of the six fundamental objectives of the Plan is to facilitate the strengthening and diversification of the local economy.

Under Section 866 of the *Local Government Act*, the City is required to include a Regional Context Statement in its Official Community Plan (OCP) and submit it to the Metro Vancouver Board for acceptance. Under the *Act*, the purpose of the Regional Context Statement is to “identify the relationship between the Official Community Plan” and the Regional Growth Strategy (i.e. Metro Vancouver’s Livable Region Strategic Plan). One of the key strategies committed to in the statement was to build complete communities, including facilitating economic development through designation of lands suitable for commercial and industrial uses and continuing development of Langley Regional City Centre.

Commercial policies emphasize downtown revitalization and business development (section 6.2), while industrial policies focused on protection of rail services and the intensification of development and use of industrial land in core areas (section 7.2).

2.3.4 Sustainability Framework

In 2010, the City developed a Sustainability Framework in collaboration with the community members, Council and staff (City of Langley 2010). The Framework is a guiding document that defines what the community will look like when sustainability is achieved. It expresses a commitment to sustainability, outlines goals and defines a structure that aligns the City’s policies, plans & actions towards a common direction.

The goal statement for the local economy, one of nine focus areas in the Framework, is as follows:

We have a diverse, strong economy with secure jobs close to home, and a mixture of well-established and new businesses that makes our Downtown unique, and complements the City’s other shopping areas.

Local businesses and jobs form the backbone of the City's local economy. This focus area is about how to meet the community's needs for a strong local economy that supports the community and City operations. Future opportunities include:

- Developing Downtown Langley in accordance with the Downtown Master Plan and Official Community Plan visions;
- Attaining a "critical mass" of population and employment density to attract rapid transit service to the City; and
- Building on promotional and "branding" initiatives to market the community as a distinctive and high quality location for visiting, residing or conducting business.

2.3.5 Downtown Master Plan

The Downtown Master Plan was completed in 2010 to stimulate long-term (i.e. 20 years) redevelopment interest through coordinated public and private infrastructure investment, and new community amenities and services (City of Langley 2016).

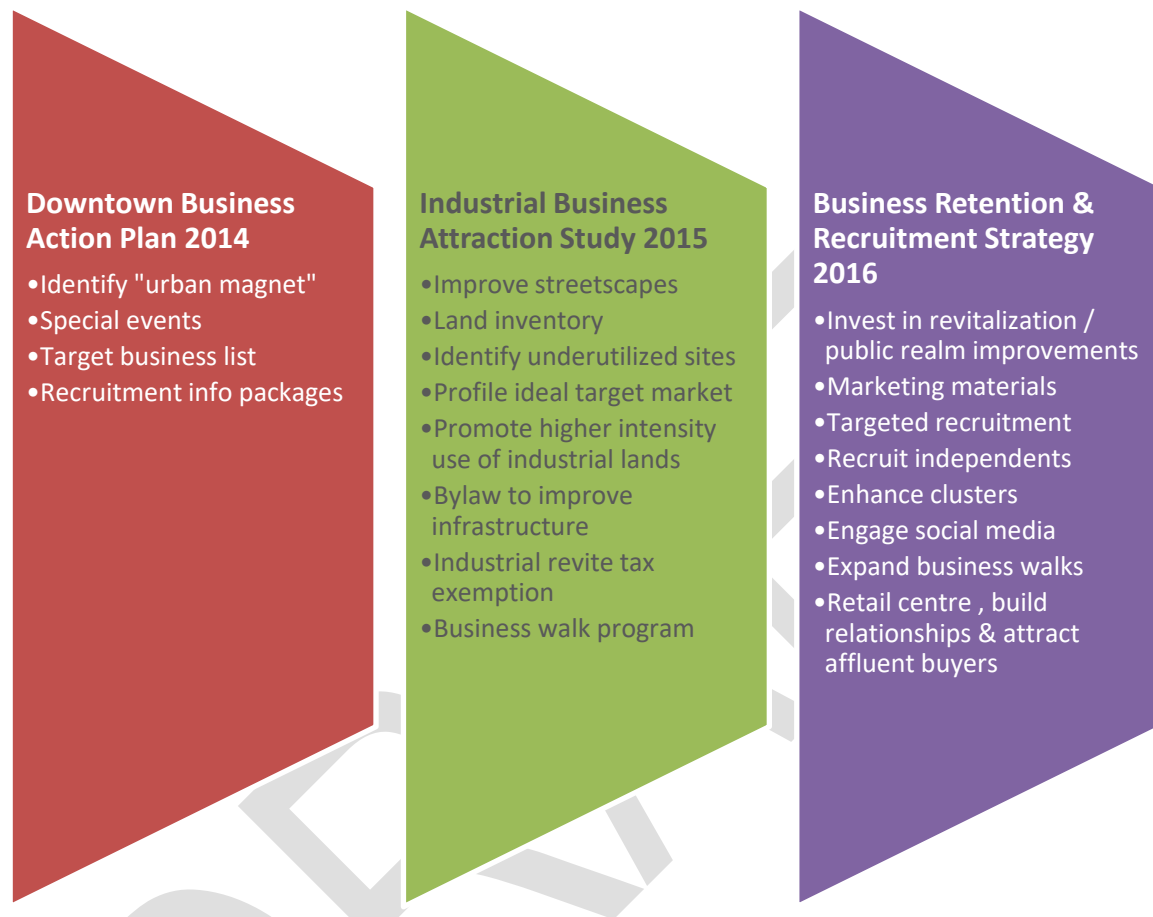
The three main development themes were concentrate, connect and complement. Eight special design districts were outlined and supported by a set of sustainable guiding principles.

The Downtown Master Plan is being implemented in partnership with the community, including the Downtown Langley Business Association (DLBA), businesses, developers and various provincial and federal agencies.

2.4 Related Economic Development Plans

The Development Services and Economic Development Department is responsible for a broad range of physical, social, economic and community planning and development matters in order to achieve Council policies and development objectives while meeting community needs. In addition to higher level economic development strategies, it undertakes studies from time to time in response to specific economic development issues and services. As seen in Figure 2-1, there are three key study areas (downtown, business retention and recruitment, and industry business attraction) which have extant plans that interact with this Strategy as part of the City's economic development framework. Many issues and recommendations discussed in these plans were reiterated during the consultation program; therefore, all recommendations made in this report that appear in the above plans are cross referenced to indicate alignment.

Figure 2-1: Key Recommendations in Current City of Langley Economic Development Plans



2.5 Overview of Community Trends

The following paragraphs are a synopsis of key socio-economic statistics and trends in the City of Langley drawn from the economic profile in Appendix 1.

1. **Demographics** – The City's population has grown steadily over the last 15 years, although the rate of expansion is only about 45% of Metro Vancouver growth. The projected population growth over the next 25 years for the Langley Local Health Area, which includes the City of Langley will exceed that province (30%) and Metro Vancouver (35%) growth rate.
2. **Labour Force** – Like most of North America, the City's labour force has gradually been moving away from goods-producing occupations toward service occupations. Even so, goods production, including manufacturing and construction activities, contributes more than one in five jobs, a considerably higher proportion than either Metro Vancouver or BC. Close to three in four

workers living in Langley have a place of work outside the City, mainly in the Township of Langley and Surrey. This mobility factor underlines the importance of regional economic development to local community wealth and well being.

3. **Other Economic Activity** – Housing starts, building permit values and business licence activity all underline the City's continued evolution as one of the Metro Vancouver's regional city centres.
4. **Manufacturing** – The City of Langley has a diversified industrial and manufacturing base that provides residents with opportunities for well-paying and relatively secure employment. Available land, reasonable land and development costs and a central location with access to major highways and rail services are factors that attract industry to the community. Although the proportion of manufacturing employment in the community has been declining (as it has elsewhere in Canada), the City is still a net importer of workers, generating more jobs than resident labour force. As noted in the OCP, the City has one of the highest jobs to population ratios among Metro Vancouver communities, a situation that is expected to persist in the decades ahead.
5. **Transportation** – The transportation sector in the City is involved mainly in trucking services, moving goods through the region and to export markets. Trucking, warehousing and other transportation operations employ close to 6% of the labour force.
6. **Retail/Commercial** – The City's retail and commercial sectors (e.g. retail, wholesale, personal, business and other services) are the leading contributors to the community's job base. Approximately 56% of all jobs are in the service sector, excluding public services.
7. **Downtown** – The downtown continues to evolve in response to shifting development patterns and changing consumer preferences. Challenges include striking a balance that builds a competitive selection of shops and services attracting strategic tenants that collectively appeal to residents and visitors, while maintaining historical relevance as a cultural and civic centre and managing housing and social issues.
8. **Tourism** – The City's tourism sector is small but integrated with the many destination attractions in the surrounding Township. The casino and convention centre in the City complements the winery, agri-tourism and outdoor recreation experiences of the Township. Further development of heritage, culture and arts attractions activities should complement growing business travel.
9. **Education** – The Langley School District is noted for its excellence in public outreach, teacher professionalism and flexibility in meeting student needs. Post-secondary opportunities are provided through Kwantlen Polytechnic University and nearby Trinity Western University. Kwantlen Polytechnic University has a modern campus located on 18.2 hectares in the City while Trinity Western University is in planning for additional expansions. International enrolments at post-secondary institutions is anticipated to increase further as post-secondary institutions participate in the provincial government's international student attraction program as part of the province's economic development plan.

2.6 Interview Program Results

In April and May of 2016, a total of 26 stakeholders were interviewed for their views on the local economic issues and opportunities for future economic development in the City. An interview summary is shown in Table 2-1.

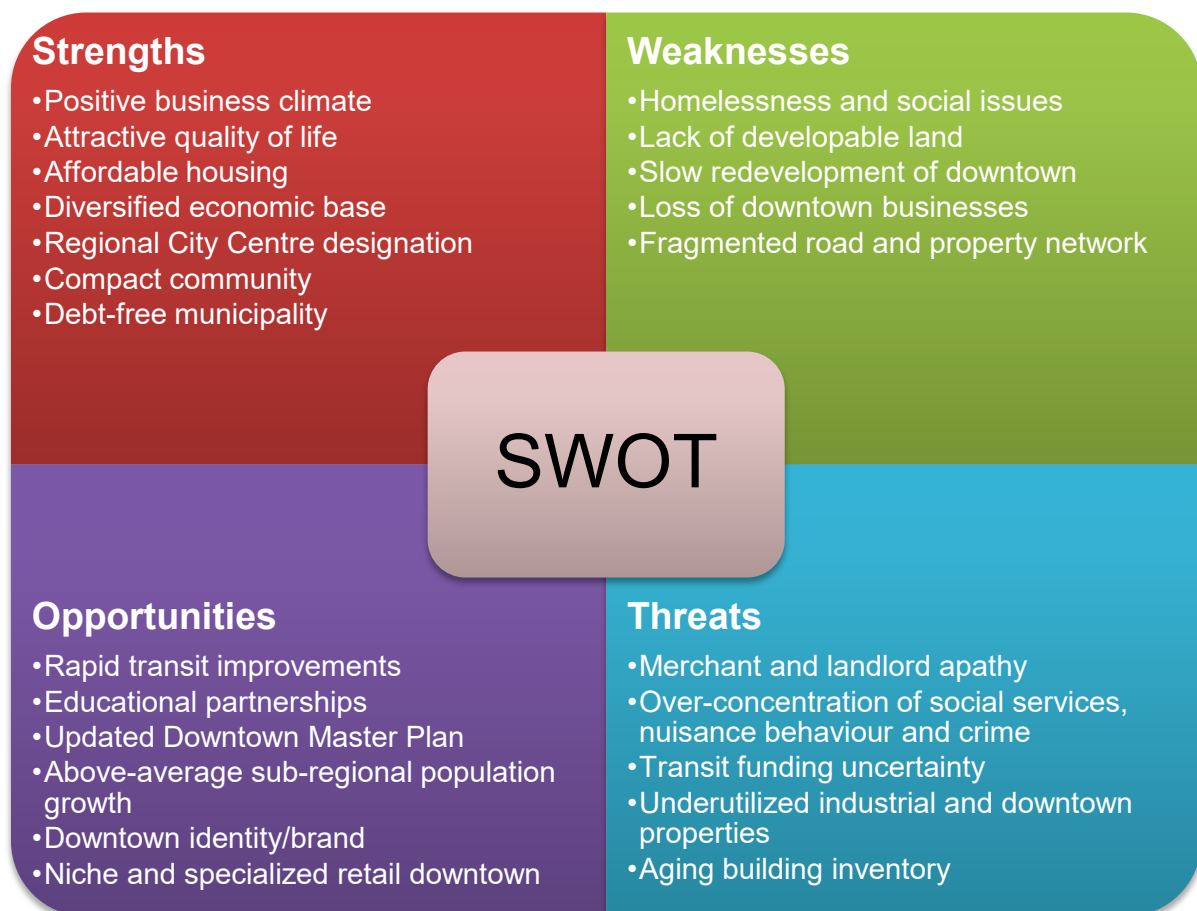
Table 2-1: Summary of Interviews

Sector	Key Issues	
Real Estate/ Developers	<ul style="list-style-type: none"> Continued brownfield redevelopment Increasing DCCs Incentivize downtown master planning 	<ul style="list-style-type: none"> Strategic land banking by the City Rezoning and development permitting linked
Manufacturing & Industrial	<ul style="list-style-type: none"> Preserve industrial land Retain key manufacturers 	<ul style="list-style-type: none"> Maintain flexibility in zoning usage Improved transit infrastructure to support worker recruitment
Tourism	<ul style="list-style-type: none"> Performing arts and culture Performing arts venue Event development downtown Lack of hotel capacity Destination casino and conference centre 	<ul style="list-style-type: none"> Downtown walking tours Parks and trails opportunities Renewal/expansion of hotel tax Aboriginal and agri-tourism
Education	<ul style="list-style-type: none"> Maintaining K-12 schools Market housing (for students) "Innovation Blvd" for Langley 	<ul style="list-style-type: none"> Online and digital learning trends Internships, coops, mentorships International student potential
Retail and Commercial	<ul style="list-style-type: none"> Technology opportunities Knowledge-led business 	<ul style="list-style-type: none"> Role/stimulus of future rapid transit
Downtown	<ul style="list-style-type: none"> Homelessness Anti-social behaviour, crime Requires a unique identity Revisit branding Attract specialized/niche retail Absentee landlords/property owners 	<ul style="list-style-type: none"> Renewed master planning Loss of banks, key retailers Entertainment district potential Promote as Regional City Centre Concentration of social services

2.7 Strengths Weaknesses, Opportunities and Threats Summary

In Appendix 1, the strengths, weaknesses, opportunities and threats (SWOT) for individual sectors were reviewed. A summary is shown in the accompanying graphic.

Figure 2-2 City of Langley SWOT Summary



3 Strategy Recommendations

The strategy recommendations include a set of economic development goals, followed by strategic initiatives structured around eight major themes.

3.1 Economic Development Goals

Goals are the measurable, attainable objectives that serve as the targets for the planning process. They indicate the intended direction as well as provide benchmarks for measuring progress so the City and its partners have a clear awareness of what they must do to achieve or accomplish the plan. Goals can be short or long-term, but for the purposes of this plan are set in the context of a six-year implementation horizon.

The following economic development goals were identified based on a review of recent planning documentation and feedback obtained from stakeholders during the interview program.

1. A distinctive, vibrant downtown.
2. A diversified base of employment land.
3. Targeted development in emerging economic sectors.
4. Leveraged sector and institutional partnerships.

3.2 Strategic Themes

The following strategy has been structured around the following four themes:

- **Place making** – marketing and investment attraction.
- **Place building** – land use, municipal services and public infrastructure.
- **Business care** – business retention, expansion and facilitation.
- **Creative economy** – emerging opportunities in arts, culture, education and technology.

3.3 Place Making

Strategy: Increase the City's exposure and awareness in the business community through the deployment of a cost-effective marketing program.

Rationale: The City has prepared a base of marketing materials at minimal cost to taxpayers. It would be worthwhile to strategically expand on these tools by creating a well defined marketing program that can be use for driving forward key initiatives in this strategy.

Steps:

1. **Community profile/site selector profile.** A comprehensive profile of the community focused on addressing data sought by site selectors is an important tool for attracting new investment. The Census is a key source in building a comprehensive profile with the complete data set from the 2016 Census likely being available in 2018. The City should therefore prepare to update the *Community Profile/Site Selector Profile* when 2016 Census of Canada data becomes available.
2. **Sector profiles.** The sector profiles are another important tool in highlighting key activities the City is interested in promoting. The City should update its existing *Sector Profiles* ensuring that they provide current information and that opportunities within specific sectors are articulated to investors and represent current planning priorities. New sector profiles should also be considered for niche retail (or "ideal" target market as recommended in the 2015 Industrial Business Attraction and Expansion Study) and the creative economy) focusing more on future development potential. The luxury car dealerships that have emerged over the last five years underline Langley's locational advantages in serving a much broader regional trade area than the City itself. In addition, supporting information on business costs and business climate should be updated on existing profiles. For example, development cost charges discussed in the residential profile is from 2008.
3. **Research.** Researching specific activities is a proven method of attracting attention to a desired opportunity that the City may want to promote or feel is not receiving the investor attention that it should. Therefore, the City should be prepared to undertake periodic research activities that promote new opportunities for business development. Potential research briefs could include:
 - Innovation and creative industry development for small cities (an extensive repository of information, research and resources can be accessed at the [Creative City Network](#));
 - Downtown shopping niches (for example, content for the business recruitment information packages recommended in the 2014 Downtown Business Action Plan);

- Annual business survey and a shopper licence plate survey as recommended in the Business Retention and Recruitment Strategy-2016; and
- Conduct regular market research to identify emerging market opportunities.

The City should be prepared to act on additional research priorities as they emerge over time.

4. **Website as a business attraction tool.** Economic development websites have become vital marketing and communication tools since they are often the first point of contact between the business investment community and a municipality. It is therefore critical for the City to ensure the economic development website provides up-to-date community and regional information. As noted in the Industrial Business Attraction and Expansion Study (2015), the City's website could better engage potential investors and site location professionals. The following examples are award-winning city and regional websites that provide clear messaging, positioning and information to businesses:

- [Explore Dryden](#)
- [Vernon Economic Development](#)
- [Lower Columbia Initiatives](#)
- [Powell River](#)

To support the economic development webpage being used as an investment attraction and business support page, the following improvements to the existing website could be made including:

- Revisit the economic development section of the website and reorganize the material to better direct enquiries to key resources more quickly. For example, many economic development sites now create information that fits within headings such as "Invest", "Work", and "Visit" in an effort to better direct enquiries and organize materials.
- Develop an interactive inventory tool to profile high value employment lands and buildings in the community.
- Connect the City of Langley website to the BC Trade and Investment land and marketing website at britishcolumbia.ca. The City of Langley currently has 384 business and property entries listed at the BC Trade and Investment site and can direct investors landing at the City of Langley site directly to the provincial site to search these opportunities.
- Build a tab around supporting local business growth with information on local, provincial and federal resources that would be useful to expanding local businesses (i.e., Chamber, Community Futures, One Stop Registry, etc.)

- Create a link to the DLBA website to foster a more direct linkage to local businesses and work with the DLBA to more actively promote local businesses through their website.
 - Follow up on additional website recommendations made in the Industrial Business Attraction and Expansion Study (2015).
5. **GIS data access.** GIS tools have become widely used to support economic development and business attraction over the past few years. The City should consider further development of web-based GIS capabilities to support economic development data within the City of Langley's interactive map system. The focus would be to integrate key economic development and business data into this user friendly interactive map system. Much of the data already exists with mapping work having been completed for specific projects such as the Business Retention and Recruitment Strategy and City of Langley's Brownfield Redevelopment Strategy (Colliers International 2016, Colliers International 2012). Business geomatics is becoming an important economic development tool, and neighbouring communities like Abbotsford have shown it can effectively applied in the Lower Mainland.
6. **Trade show and conference participation.** Create exposure for the City of Langley by participating in select trade shows with industry and institutional partners where opportunities for exposure are significant. Attendance at major events are recommended, including:
- International Conference of Shopping Centres;
 - BC Real Estate Convention; and
 - International Downtown Association.
- Professional development conferences are also important to attend to keep up-to-date on best practices and expand intelligence networks. We recommend the following for regular, if not annual, attendance:
- Economic Development Association of British Columbia;
 - Planning Institute of BC;
 - Canadian Institute of Planners; and
 - American Planning Association.
7. **Trade missions.** In recent years the City has been successful in attracting foreign and regional investment to the community. Continued consistent participation in trade missions (both inbound and outbound) and creating a profile for the City of Langley will be critical in building on this success. The City should continue hosting trade missions, promoting the City of Langley as one of seven Regional City Centres.
8. **Destination retail stores.** As outlined in the Downtown Langley Action Plan, the past few years has seen the arrival of several high profile national and regional chain businesses (Colliers International 2014). To further capitalize on this retail investment locally, the City should actively recruit destination stores to

further expand and diversify the retail cluster in the City. As noted in the following strategy, a contract retail recruiter should be considered.

9. **Downtown anchor tenant.** The Downtown Langley Action Plan identifies the objective to increase sales and customer visits and expand the appeal of the downtown to the larger regional area (Colliers International 2014). This marketing goal would be supported with the establishment of an anchor tenant in the downtown. Therefore, the City should undertake a targeted investment attraction campaign to draw a desired anchor tenant to the downtown. Serious consideration should be given to supplementing retail attraction efforts by contracting a retail recruitment specialist. This can be done on a pilot basis (e.g. 2 years), which allows enough time to measure progress without committing the City longer term.

3.4 Place Building

Strategy: Use land and infrastructure to stimulate private sector investment that creates jobs and enhances quality of life for residents.

Rationale: Infrastructure is a key determinant of community wealth through the provision of basic services and the physical assets needed to move goods and people within and across the economy. The City of Langley is responsible for upgrading and replacing aging municipal infrastructure, while at the same time encouraging senior governments and the private sector to make transportation, utility, communications and institutional investments that will keep the economy vibrant and attractive for new development.

Actions:

10. **Tax incentives.** The DLBA implemented the Get Fresh program, which offers grant-matching funds to businesses to upgrade their storefronts and building facades. The Downtown Revitalization Tax Exemption program also provides municipal tax incentives to businesses wanting to revitalize their property. The City currently utilizes two financial incentive programs targeting building revitalization. However, there has been discussion of expanding the portfolio of tax incentives to achieve a wider range of development goals.

The City should review and possibly supplement tax incentives to achieve strategic objectives related to investment attraction. The Industrial Business Attraction and Expansion Study (2015) recommended that the City should explore if there is an additional application of tax incentives to attract or grow new industrial and commercial activity outside of the downtown area. In addition, linked to the new Downtown architectural design scheme, the City could explore waiving , business licences, parking requirements and building permit

fees to promote the new urban design scheme and foster the development process. Overall, the City should assess the competitiveness of their tax incentives and determine what new tax incentives will help position the City to achieve its vision for future development.

11. Development cost charges (DCCs). According to the Province's Best Practice Guide's related to DCCs, it is important to establish the appropriate "assist factor" to help pay the costs of municipal parks and infrastructure (BC Ministry of Community Services. 2005). This means that something less than 100% of the development related costs of a new project can be charged by the local government, with the rate being set locally. Overall, the municipality assist factor should be a reflection of the community's support towards the financing of infrastructure required to serve development and fit within the City's other planning documents (i.e., OCP, financial plans, etc.). The City should consider the assist factor in its next bylaw review and gather supplementary research on neighbouring municipalities and how they compare on the assist factor.

12. Relationship building. Continue to meet with real estate associations and other key stakeholders to build awareness of the City of Langley as a place to invest and do business. Key organizations, as also noted in the Downtown Business Action Plan (2014) include:

- [Urban Development Institute](#)
- [NAIOP Vancouver Chapter](#)
- [Fraser Valley Real Estate Board](#)
- [Urban Land Institute](#)
- [International Council of Shopping Centres](#)

13. Downtown Master Plan. The City of Langley Downtown Master Plan was completed in 2010 and has seen several key actions implemented. It is now time to reflect on the tasks completed to date and consider how priorities may have shifted over the past six years. The City should revisit the Downtown Master Plan and consider:

- Successful revitalization in other such as New Westminster and Kelowna;
- Revisiting a theme for the Downtown area that will support a strong brand for marketing the Downtown core of Langley, currently facilities, programs and events for the arts are emphasized as a theme for downtown revitalization; and,
- Potential zoning and design concepts that explicitly recognized the eventual arrival of rapid transit to the City centre.

Finally, the City may wish to consider utilizing the services of the Urban Land Institute's [Technical Advisory Panel](#) services as a sounding board for Plan development.

14. **Streetscape upgrades.** Improvements made in the last downtown revitalization program in 1995 are deteriorating and upgrades and maintenance is required to keep the downtown looking cared-for, safe and vibrant. The Industrial Business and Attraction Study (2015) advocated a similar emphasis in industrial areas as a way of encouraging redevelopment there. The Industrial Business Attraction and Expansion Study (2015) went further in recommending a Local Area Improvement Bylaw. The City should therefore continue to work towards an improved streetscape and enhanced level of maintenance within retail and industrial areas (with or without new bylaw provisions), including sidewalk lighting, sidewalks, lanes and plazas.
15. **Control of undesirable uses.** Municipalities have at their disposal a number of devices to control the placement of businesses or services that are deemed to be contrary to local planning objectives or create burdensome social and economic costs for ratepayers. For example, several Lower Mainland municipalities have zoning and bylaw provisions related to harm reduction, drug treatment services and “adult oriented” services such as massage parlours, tattoo parlours, pawnbrokers, escort services and cannabis dispensaries. In the case of downtown Langley, a proliferation of some types of social services and businesses is believed linked to increasing instances of nuisance behaviour and property crime that is deterring resident and visitor use of the area and its businesses. The City does regulate undesirable land uses such as pawn shops, currency exchange, massage parlours and pharmacies, and it has embarked on homelessness and crime initiatives to help address these problems. As a specific measure to support the attraction of businesses fulfilling desired shopping niches as outlined in the Downtown Business Action Plan (2014), the City should examine options for exerting more municipal authority over the types of businesses and services locating downtown. Collaboration with agencies such as Fraser Health, BC Housing and non-profit service providers is also recommended.
16. **Downtown architectural building scheme** – The City of Langley and DLBA worked successfully in undertaking initial planning and scoping of seven specific rundown downtown buildings. The objective of this initiative was to increase the likelihood of the subject properties being redeveloped in a character and style that would support business growth in the Downtown. Of the seven that were selected for this initiative at least two generated enough interest that they were sold and redeveloped. Given the value that was created from this first exercise, it is suggested that the DLBA and the City undertake a similar exercise, which would focus on a Downtown building scheme. The concept would be to promote a more consistent, visually dynamic look and feel by illustrating the potential increase in land and building values for property owners and landlords. The City of Kelowna has had success with this approach on a small scale basis, that is for individuals streets and blocks.
17. **Building maintenance.** Buildings that are well kept and undergo regular maintenance and updates are key to ensuring on-going occupancy of a property and in turn a key factor in supporting the vibrancy of the surrounding

neighbourhood. Conversely, if a property is rundown or remains unoccupied for an extended period, it can have an adverse effect on the surrounding businesses. To encourage property owners and landlords to maintain their buildings and foster new investment in them the City should explore amendments to their bylaws that incentives this behaviour.

3.5 Business Care

Strategy: Collaborate on the retention and expansion of the existing businesses in the community.

Rationale: Most real job growth in communities is created by existing businesses rather than by businesses relocating from another community. Business retention and development programs help local businesses so they are able to survive difficult industry or economic conditions without having to relocate somewhere else. This requires an understanding of prevailing issues and opportunities, and interactive networking among community businesses and the City on appropriate responses for meeting local business needs.

Actions:

18. **Business support.** Continue providing business support services in response to enquiries from City-based companies seeking assistance accessing resources or navigating red tape. For enquiries that do not entail a service provided by the City, referrals to other service providers can be useful. For this reason a listing of major service providers (e.g. DLBA, Greater Langley Chamber of Commerce, federal and provincial agencies) and their programs should be maintained.
19. **Business Retention and Expansion (BRE).** Surveys show that existing businesses create as much as 80% of all new jobs in a community. The City of Langley economic development department already interacts closely with its business community as specific issues arise. However, there is potential to more proactively seek out and coordinate the addressing of business issues and concerns as well as supporting expansion and attraction efforts. A targeted BRE program working directly with selected businesses to address business climate issues in the City. Specific tasks could include:
 - Continuing to engage the real estate/development sector (NAIOP and UDI) industry on potential improvements to City bylaws that generate interest in the City's industrial, commercial and residential areas, particularly those targeted for major development.
 - Priorities should be established for the recent published Business Retention and Recruitment Strategy.

20. **Business Walks.** The Business Walk program offers an opportunity to hear from the local business community, identifying common themes for action while bringing together educational resources, municipal services and representatives of the business community for specific action plans. In the City the program has been done in collaboration with the DLBA and KPU and has facilitated dialogue and solutions of both public and private sector issues.
21. **Job fairs.** Conduct a job fair for Langley that focuses on the needs of employers in the City. This made in Langley job fair could help local firms looking to connect to a more local workforce that face challenges replacing workers they are losing through attrition. In addition, Langley may also want to work directly with local business to participate in the Vancouver Job Fair which is held twice a year.
22. **Downtown walking tour.** The City has successfully installed wayfinding signage in that allows residents and visitors to navigate the downtown shopping area. Interpretive signage for a walking tour could further enhance interest and understanding of the distinct features of the downtown area. Settlement history (e.g. Langley Prairie, Fraser Highway), film history and sites, and event interpretation are all possibilities. The tour would be self-directed and patterned after of the Langley Heritage Society's tours of Fort Langley and Murrayville. The City should seek Society and DLBA) guidance for tour themes, content and signage.
23. **Night market.** Night markets or night bazaars are street markets which operate at night and are generally dedicated to more leisurely strolling, shopping, and eating than more businesslike day markets. They are typically open-air markets. Currently the Surrey Night Market, now entering its 3rd season and running from June 3 to August 14, is the only street market in Metro Vancouver. A night market was mentioned in the Downtown Business Action Plan (2014) and is worthy of further investigation by the City in cooperation with the DLBA.
24. **McBurney Plaza programming and events.** The McBurney Plaza programming and events have been very popular in drawing residents into the Downtown. Many of the specific events and activities require considerable planning time. In order to foster a comprehensive program that is well organized and planned, the City should consider a three year funding commitment to the DLBA and ensure that City events are also funded at a level that complements DLBA events. This would allow the Downtown DLBA and the City to begin planning earlier and provide better lead time in securing key services and quality entertainment.

3.6 Creative Economy

Strategy: Support creative economic sectors that leverage Langley's land and institutional assets while contributing to downtown development.

Rationale: The Province has just launched a three-year Creative Economy Strategy that provides some guidance for how communities like Langley can take better

advantage of their arts, culture and technology sectors. The strategy focuses on talent and creative clusters, accessing new markets, maximizing investment and enriching communities. Among the many strategic initiatives are financial support for building collaborative spaces, supporting arts and culture that contribute to destination development in BC, continuing to invest in major arts and cultural festivals and events, and launching a province-wide consultation process with indigenous artists. This provincial focus provides a prime opportunity for closer collaboration with Langley's post-secondary institutions, both Kwantlen Polytechnic University (KPU) and Trinity Western University (TWU). The creative economy not only has the potential for greater wealth creation, it is also a logical target for the City given its desire to encourage more intensive uses of its limited land and building space.

Actions:

25. **Performing arts centre.** Discussion about creating a performing arts space in the City has been ongoing for several years. KPU has a very successful music program based at the Langley campus and the university is interested in expanding into other performing arts programming such as dance and theatre. The Langley campus has music classrooms, teaching studios and individual practice rooms for the music school, but a facility for hosting a broader range of performing arts is lacking. Such a facility would have several benefits for the City, similar to those experienced by the Township with the Langley Events Centre. First, it would draw more domestic and international students and faculty to the City, second it would enhance arts and entertainment programming locally (something that is seen as highly desirable especially in downtown), and third, it would act as a stimulus for adjoining land redevelopment. Moreover, it reinforces recommendations made in the Downtown Business Action Plan (2014) for a Langley "Urban Magnet" theme. The City should discuss with KPU how further feasibility and business planning could be advanced.
26. **Education summit.** Langley has two major post-secondary institutions in KPU and TWU and although the latter is technically a Township tenant, it still exerts an influence on the City's civic and economic affairs. One initiative the City should consider is an education summit that would be jointly hosted with both institutions and the Township for the purpose of exploring the ever-increasing connections between education, skills development, economic development and community building. Similar summits take place all over North America on a regular basis on a wide-ranging list of themes and topics. For Langley, issues of urbanization, technology and international education, among others, could be investigated for discussion amongst educators, policymakers, parents and students. The City should meet with KPU, TWU and the School District to see if there is interest in hosting a summit and if so, to prepare a development concept on which to base further planning.

27. **Innovation hub.** KPU has been closely involved in Surrey's Innovation Boulevard, which is one of that City's cornerstone economic development programs, targeting new health technologies (medical devices, independent living, digital health). The Langley campus of KPU has cutting-edge science labs and specific expertise in horticulture/food (e.g. greenhouse production, brewing) and nursing that could be the foundation of a similar innovation hub, although at a more modest scale than that undertaken in Surrey. The City should discuss with KPU some early-stage conception about what such a hub would involve and engage other interested partners in bringing together a firm development concept.
28. **KPU tech campus.** The KPU Tech campus is located in neighbouring Cloverdale, and there are plans to invest in a high-tech innovation zone that would include a clean tech accelerator group, new technology programming and new industry-education partnerships. If successful, the campus would facilitate a cluster effect, spinning out new enterprises and attracting others interested in establishing commercial partnerships as well as taking advantage of school graduates. Langley offers highly attractive location characteristics, in addition to available land and building space, that could appeal to entrepreneurs and businesses seeking close proximity to the Cloverdale campus.
29. **Future rapid transit services.** In cooperation with Translink, the Township of Langley and the City of Surrey, promote expansion of Rapid Transit services to Langley Regional City Centre. Research on transportation issues, opportunities and business cases for enhanced services can support political input into Translink's long-term planning processes. The future possibility of Skytrain or light rail services would have significant implications for Langley and is worthy of long-term vision support.
30. **Strategic land assembly.** The City should continue to explore strategically assembling land and packaging development that could be leveraged for new projects that contribute to long-term planning and community development objectives. Three specific initiatives identified during the consultation program included:
- Land assembly on Fraser Hwy between 203 and 204 that is likely to be the future terminus of rapid transit services from Surrey;
 - Performing arts centre (previous feasibility has indicated that the best site would be on the KPU campus, but there may be other factors that would favour an off-campus location in Downtown); and
 - Hotel and convention space, the lack of which at this time has been identified as a barrier to further tourism development in Langley, specifically in relation to increasing overnight stays and boosting the small meeting and convention market.
31. **Fibre optic network.** The city of Stratford, Ontario (population 51,000) is globally recognized as a leading "smart city" due to free citywide WiFi and a 70-

kilometre fibre-optic network that can run at speeds of up to one gigabit per second. This resulted in the University of Waterloo opening a digital media campus, and Royal Bank of Canada building a major data centre. Other tech companies now use Stratford for testing facilities. The City of Kamloops established a similar “dark fibre network” referred to as the Kamloops Community Network (KCN). KCN entailed 50 km of fibre optic cable to service the City, but dedicated fibre strands are leased to private companies who are deemed to generate economic and other local benefits. The city of St. Albert, Alberta has recently completed a Smart City Master Plan with a vision for the community as a collaborator, technology adopter, and test-bed for new innovations.

The City should prepare a fibre strategy to guide the expansion of its existing network not only for internal needs, but in support of ongoing industrial and retail business recruitment efforts and property redevelopment, as well. The strategy would outline regulatory, organizational and service options with serious consideration given to the networks potential use as an economic development tool, similar to what Kamloops has done. It would also need to include research on current and future expected service plans by major telecoms (e.g. Telus, Bell, Shaw, Rogers) and how a City network would fill service or capacity gaps.

3.7 Monitoring and Evaluation

Strategy: Monitor plan implementation and evaluate effectiveness of projects.

Actions:

32. An annual review should include a checkup of any portion of the action plan falling within the time period. Basic indicators and associated sources of information are shown in Table 3-1. Changes in resources that will impact the strategy should be noted and the strategy altered accordingly.

Table 3-1: Indicators for Measuring Outputs and Outcomes by Theme

Themes	Indicator
Place Making	<ul style="list-style-type: none"> • Website metrics • Enquiries received • Events hosted • Relationships with real estate companies and agents
Place Building	<ul style="list-style-type: none"> • Invested capital • Business climate perceptions • Redevelopment projects • Remediation/brownfield sites
Business Care	<ul style="list-style-type: none"> • Businesses assisted • Investor enquiries • Hosted visits • Projects assisted • Business perceptions • Client success stories
Creative Economy	<ul style="list-style-type: none"> • Partnerships created • Projects engaged • Change in business licences • Economic measures (e.g. jobs) • Relationships with educational institutions

4 Summary of Recommendations

Abbreviations

DLBA	Downtown Langley Business Association
FVREB	Fraser Valley Real Estate Board
GLCOC	Greater Langley Chamber of Commerce
KPU	Kwantlen Polytechnic University
LAC	Langley Arts Council
LSD	Langley School District
MV	Metro Vancouver
TBD	To Be Determined
TL	Tourism Langley
TOL	Township of Langley
TWU	Trinity Western University
ULI	Urban Land Institute

Notes

Priority Level rankings in the summary have the following definitions:

- High - top priority for implementation
- Medium - second order priority, suitable for implementation if resources and time allow and partners motivated
- Flex - third order priority, best suited for partial implementation if resources and time allow, but can be deferred












Estimated Cost:

- Cash costs only, does not include time of City staff
- TBD indicates cash costs will accrue but are cannot be estimated due to uncertainty of project parameters

Strategies	Partners	Priority Level	Estimated Cost	Timelines		
				2017-18	2019-20	2021-22
1. Community profile/site selector profile		Medium	\$10,000		●	
2. Sector profiles		Flex	\$15,000		●	
3. Research	Real Estate firms, universities	Flex	\$25,000		●	●
4. Website as a business attraction tool		High	\$25,000	●		
5. GIS data access		Medium	\$30,000		●	
6. Trade show and conference participation		Flex	\$5,000	●	●	●
7. Trade missions	DLBA, GLCOC, Major Employers	Flex		●	●	●
8. Destination retail stores	DLBA, Willowbrook	High	TBD	●	●	●
9. Downtown anchor tenant	DLBA	High	TBD	●		
10. Tax incentives	DLBA, GLCOC, Real Estate Industry	Medium		●	●	●
11. Development cost charges	Real Estate Industry	Medium		●	●	●
12. Relationship building	Real Estate Industry	Flex		●	●	●
13. Downtown Master Plan	ULI	High	\$150,000	●		

14. Streetscape upgrades	DLBA	High	TBD			
15. Control of undesirable uses	DLBA	Medium				

Strategies	Partners	Priority Level	Estimated Cost	Timelines		
				2017-18	2019-20	2021-22
16. Downtown architectural building scheme	DLBA	High	\$50,000			
17. Building maintenance	DLBA	Flex				
18. Business support	DLBA, GLCOC	Flex				
19. Business Retention and Expansion	DLBA, GLCOC	Medium				
20. Business Walks	DLBA, KPU	High				
21. Job fairs	GLCOC, KPU, TWU, DLBA	Flex				
22. Downtown walking tour	DLBA, TL	Medium	\$15,000			
23. Night market	DLBA, TL	High				
24. McBurney Plaza programming and events	DLBA, TL	High				
25. Performing arts centre	KPU, DLBA, TL	Medium	TBD			

26. Education summit	KPU, TWU, School District, TOL, LAC	Medium	\$20,000			
27. Innovation hub	KPU, TWU	Flex				
28. KPU Tech campus	KPU	Flex				
29. Future rapid transit services	MV, Real Estate Industry	Flex				
30. Strategic land assembly		Flex				
31. Fibre optic network	MV, Local Service Providers	Medium	TBD			

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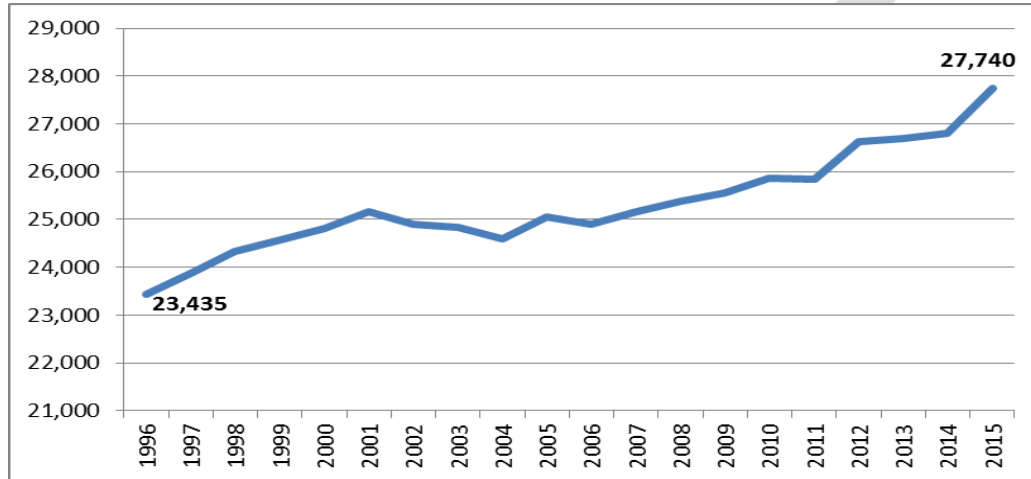
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APPENDIX 1 – SOCIO-ECONOMIC PROFILE

POPULATION

In 2015, the population for the City of Langley was estimated at 27,740, an 18% increase over the 1996 population of 23,435.

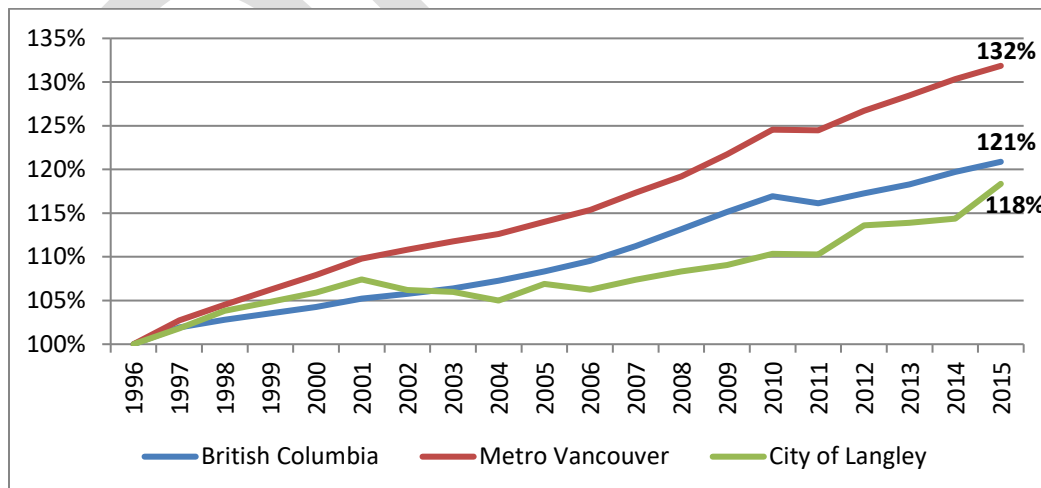
Figure 5-1: Change in Population for the City of Langley, 1996-2015



Source: BC Stats (2016c)

A comparison of population trends between 1996 and 2015 for the City of Langley, the Metro Vancouver, and BC is shown in Figure 5-2. Growth in Metro Vancouver was 32%, followed by provincial growth at 21% and City of Langley growth at 18%.

Figure 5-2: Percentage Change in Population City of Langley, 1996-2015

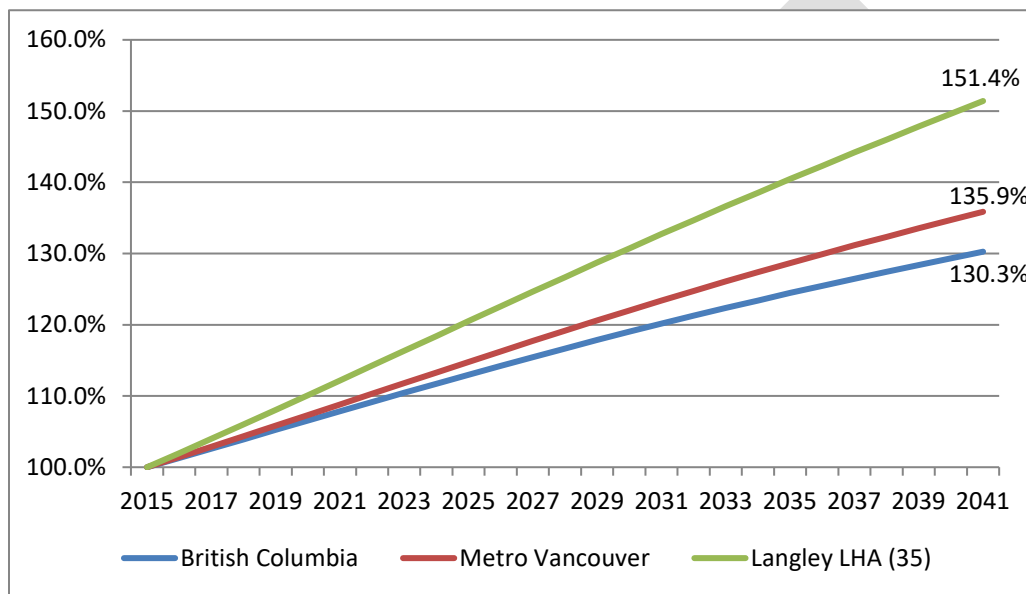


Source: BC Stats (2016c)

POPULATION PROJECTIONS

According to BC Stats, population growth in Metro Vancouver and British Columbia is anticipated to grow between 30 to 36% from 2016 and 2041. Metro Vancouver will lead the way with a growth rate of 36% over the period. However, the Langley Local Health Area (Health Area 35) which includes the City of Langley, is anticipated to lead both of these jurisdictions with much stronger growth and is projected to add over 51% to its existing population over the same period (Figure 5-3).

Figure 5-3: Projected Change in Population for Langley and Benchmark Areas, 2011-2026



Source: BC Stats (2016d)

Note: The City of Langley OCP projects growth of 35% between 2016 and 2041. This projection is also part of 2013 update for Regional Growth Strategy.

POPULATION AGE

The median age of the City of Langley's population in 2011 was 40.4 years, up from 39.4 years in 2006, and 36.5 years in 2001. The City of Langley median age is closely tracking that seen at the Metro Vancouver level, but lower than the province.

Table 5-1: Median Population Age for Langley and Benchmark Areas, 2001, 2006, and 2011

	2001	2006	2011
City of Langley	36.5	39.4	40.4
Township of Langley	37.3	39.1	40.3
City of Surrey	35.6	37.0	37.5
Metro Vancouver	37.4	39.1	40.2
British Columbia	38.4	40.8	41.9

Source: Statistics Canada (2001) (2006) (2012)

As seen in Table 5-2, in 1991 the City of Langley had a much higher share of its population in the under 19 age group compared to Metro Vancouver or BC, but over time it has diminished and now has the same proportion of its population under 19 years.

Table 5-2: Change in Age Distribution, 1991 and 2011

	1991			2011		
	Langley City	Metro Van.	BC	Langley City	Metro Van.	BC
Under 19 years	29%	25%	27%	21%	21%	21%
20 to 44 years	40%	43%	40%	35%	36%	33%
45 to 64 years	16%	20%	20%	27%	29%	30%
65 years and over	15%	12%	13%	17%	14%	16%

Source: Statistics Canada (1991) and (2012)

In North America, factors such as declining birth rates and increasing life expectancies are contributing to the gradual ageing of the population. In British Columbia, over 23% of the population will be seniors in 2035, up from just over 15% in 2011 (Table 5-3). In the Langley Local Health Area (LHA), it is forecast that the population will age in a similar fashion, with the population over 65 years rising from just over 16% of the region in 2011, to just under 20% in 2035.

Overall, the implications for housing, health, labour force and services for the Langley area and the province will be profound. By 2035 when the BC population is forecast to reach approximately 6.1 million, there will be over 1 million BC residents aged 65 years to 79 years and an additional 0.4 million residents older than 80 years.

Table 5-3: Forecast Age Group Distribution, BC, 2011 and 2035

	Langley LHA		British Columbia	
	2011	2035	2011	2035
< 19 years	23.2%	21.5%	21.0%	19.1%
20-44 years	33.4%	32.1%	34.5%	30.6%
45-64 years	27.1%	26.8%	29.2%	26.7%
65- 79 years	11.7%	13.6%	10.9%	16.4%
> 80	4.7%	6.1%	4.3%	7.2%

Source: BC Stats (2011e)

EDUCATION CHARACTERISTICS

The educational attainment of City of Langley residents tends to be different from both Metro Vancouver and provincial populations, although differences in the 25 to 34 age group appear greater than they are in the 35 to 64 age group. In general, City of Langley residents are more likely to have less than grade 12, grade 12 graduation and trade certificates than their Metro Vancouver and provincial counterparts. In turn, they are much less likely to be university graduates.

Table 5-4: Highest Education Level by Age Group for Langley and Benchmark Areas, 2011

Total population aged 25 to 64 years by highest certificate; diploma or degree	City of Langley	Metro Vancouver	BC
No certificate; diploma or degree	11.8%	8.4%	10.1%
High school diploma or equivalent	30.6%	23.1%	25.1%
Postsecondary certificate; diploma or degree	57.6%	68.6%	64.8%
Apprenticeship or trades certificate or diploma	15.2%	8.5%	11.3%
College; CEGEP or other non-university certificate or diploma	21.8%	18.6%	19.9%
University certificate or diploma below bachelor level	6.3%	7.3%	6.3%
University certificate; diploma or degree at bachelor level or above	14.3%	34.1%	27.3%
Bachelor's degree	10.3%	21.6%	17.3%
University certificate; diploma or degree above bachelor level	4.0%	12.5%	9.9%

Source: Statistics Canada (2013)

Moving forward, the levels of formal post-secondary education, either in the form of trades certification or university graduation, are expected to increase as the

economy attempts to fill demand for more professional, engineering and technology-related jobs.

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LABOUR FORCE

In 1991, the total City of Langley labour force was approximately 10,085, of which 2,540 workers were associated with the goods producing sectors and 7,385 in the service sectors. As illustrated in Table 5-5, the 2011 labour force in the City of Langley had grown to 13,285, representing an increase of almost 34% since 1991.

Table 5-5: Labour Force by Industry for City of Langley and Benchmark Areas, 2011

Total labour force pop. aged 15 years & over by industry	City of Langley		Metro Vancouver	BC
Industry - not applicable	220	1.6%	2.2%	2.1%
All industries	13285	98.4%	97.8%	97.9%
11 Agriculture, forestry, fishing and hunting	140	1.0%	1.0%	2.6%
21 Mining, quarrying, and oil and gas extraction	0	0.0%	0.4%	1.1%
22 Utilities	70	0.5%	0.6%	0.6%
23 Construction	1420	10.5%	6.6%	7.7%
31-33 Manufacturing	1265	9.4%	6.4%	6.3%
Total Goods Producing:	2895	21.4%	15.0%	18.3%
41 Wholesale trade	925	6.8%	4.7%	3.8%
44-45 Retail trade	1860	13.7%	10.6%	11.3%
48-49 Transportation and warehousing	745	5.5%	5.4%	5.0%
51 Information and cultural industries	210	1.6%	3.5%	2.6%
52 Finance and insurance	360	2.7%	4.9%	3.9%
53 Real estate and rental and leasing	155	1.1%	2.6%	2.3%
54 Professional, scientific and technical services	560	4.1%	9.5%	7.6%
55 Management of companies and enterprises	25	0.2%	0.1%	0.1%
56 Admin & support, waste management & remediation services	575	4.3%	4.5%	4.2%
61 Educational services	900	6.7%	7.4%	7.1%
62 Health care and social assistance	1310	9.7%	9.9%	10.6%
71 Arts, entertainment and recreation	400	3.0%	2.4%	2.4%
72 Accommodation and food services	885	6.6%	7.6%	7.6%
81 Other services (except public administration)	770	5.7%	4.8%	4.8%
91 Public administration	710	5.3%	4.8%	6.1%
Total Service Producing:	10390	77.0%	82.8%	79.6%

Source: Statistics Canada (2013)

Much of the labour force growth in the City of Langley over the past 20 years has been in the service producing sector, which now makes up more than 78% of the

entire labour force. However, in comparison, both Metro Vancouver and the province continue to have a larger percentage share of their labour force in the service producing sector than the City of Langley. This highlights the continued strength of the goods producing sector as an employment source for residents of the City, particularly within the construction and manufacturing sectors which dominate the City of Langley's goods producing labour force.

The strength of the regional trade sector emerges when labour force data is viewed from a different perspective, occupational category (Table 5-6). Sales and services represent the largest occupational group for the City of Langley, as it does for Metro Vancouver. In Metro Vancouver, business, finance and administrative is the second largest group, followed by trades, transport and equipment operators. Meanwhile, in the City of Langley it is trades, transport and equipment operators that is the second largest category making up almost 20% of the labour force.

Table 5-6: Labour Force By Occupation for City of Langley and Metro Vancouver, 2011

	City of Langley		Metro Vancouver	
Total labour force population aged 15 years and over by occ.	13,505	100.0 %	1,273,335	100.0 %
Occupation - not applicable	220	1.6%	27,580	2.2%
All occupations	13,280	98.3 %	1,245,755	97.8 %
0 Management occupations	1,230	9.1%	148,575	11.7 %
1 Business; finance and administration occupations	2,180	16.1 %	218,815	17.2 %
2 Natural and applied sciences and related occupations	545	4.0%	95,475	7.5%
3 Health occupations	725	5.4%	76,705	6.0%
4 Occ. in education; law and social; community and gov. ser.	1,435	10.6 %	143,595	11.3 %
5 Occupations in art; culture; recreation and sport	215	1.6%	50,835	4.0%
6 Sales and service occupations	3,395	25.1 %	303,770	23.9 %
7 Trades; transport and equipment operators and related occ.	2,640	19.5 %	152,660	12.0 %
8 Natural resources; agriculture and related production occ.	240	1.8%	16,960	1.3%
9 Occupations in manufacturing and utilities	675	5.0%	38,365	3.0%

Source: Statistics Canada (2013)

LABOUR FORCE MOBILITY

Table 5-8 outlines residency of those workers who have a usual place of work inside the City of Langley in 2011. As illustrated, 31.6% of the total workforce with a usual place of work in the City of Langley, come from the City of Surrey. The Township of Langley was the second largest supplier of workers (29.9%) who had a usual place of work in the City. The City of Langley contributed 14.2% of the labour force who had a usual place of work in the City. Collectively, these three jurisdictions represented 75.7% of the total workers with a usual place to work in 2011.

Table 5-7: Commuting From Surrounding Areas To The City of Langley For The Employed Labour Force Having a Usual Place of Work, 2011

Place of residence	Male		Female		Total	
Chilliwack, CY	120	1.7%	110	1.5%	230	1.6%
Abbotsford, CY	640	9.0%	625	8.2%	1,265	8.6%
Mission, DM	155	2.2%	45	0.6%	200	1.4%
Langley, DM	1,910	26.8%	2,495	32.9%	4,405	29.9%
Langley, CY	880	12.3%	1,210	16.0%	2,090	14.2%
Surrey, CY	2,355	33.0%	2,290	30.2%	4,645	31.6%
White Rock, CY	55	0.8%	90	1.2%	145	1.0%
Delta, DM	150	2.1%	100	1.3%	250	1.7%
Richmond, CY	65	0.9%	40	0.5%	105	0.7%
Vancouver, CY	155	2.2%	105	1.4%	260	1.8%
Burnaby, CY	165	2.3%	110	1.5%	275	1.9%
New Westminster, CY	35	0.5%	40	0.5%	75	0.5%
Coquitlam, CY	135	1.9%	90	1.2%	225	1.5%
Port Coquitlam, CY	40	0.6%	60	0.8%	100	0.7%
Port Moody, CY	20	0.3%	0	0.0%	20	0.1%
North Vancouver, DM	10	0.1%	0	0.0%	10	0.1%
North Vancouver, CY	20	0.3%	0	0.0%	20	0.1%
Pitt Meadows, CY	30	0.4%	35	0.5%	65	0.4%
Maple Ridge, DM	195	2.7%	135	1.8%	330	2.2%
Total	7,135	100.0%	7,580	100.0%	14,715	100.0%

Source: Statistics Canada, Census (2016)

As illustrated in Table 5-8, a significant share of the labour force travels outside of the City of Langley for work. Of those with a usual place of work, just 21.2% actually worked within the City of Langley in 2011. This is similar to the share seen in 2006 (21.9%). The largest number of City of Langley residents worked in the City of Surrey in 2011 (27.0%), this is up from 2006 when 22.8% of City of Langley residents worked in Surrey. A further, 26.5 per cent of City of Langley residents worked in the Township of Langley in 2011, down from a share of 27.2% in 2006.

Table 5-8: Commuting Flow For the Employed Labour Force Having a Usual Place of Work, 2011

Place of work	Male		Female		Total	
Chilliwack, CY	30	0.7%	40	0.7%	70	0.7%
Abbotsford, CY	105	2.4%	240	4.4%	345	3.5%
Mission, DM	15	0.3%	20	0.4%	35	0.4%
Langley, DM	960	22.0%	1650	30.0%	2610	26.5%
Langley, CY	880	20.2%	1210	22.0%	2090	21.2%
Surrey, CY	1205	27.7%	1460	26.5%	2665	27.0%
White Rock, CY	20	0.5%	75	1.4%	95	1.0%
Delta, DM	215	4.9%	120	2.2%	335	3.4%
Richmond, CY	275	6.3%	160	2.9%	435	4.4%
Greater Vancouver A, RDA	0	0.0%	15	0.3%	15	0.2%
Vancouver, CY	180	4.1%	230	4.2%	410	4.2%
Burnaby, CY	310	7.1%	130	2.4%	440	4.5%
New Westminster, CY	0	0.0%	45	0.8%	45	0.5%
Coquitlam, CY	95	2.2%	45	0.8%	140	1.4%
Port Coquitlam, CY	50	1.1%	0	0.0%	50	0.5%
North Vancouver, DM	0	0.0%	15	0.3%	15	0.2%
Maple Ridge, DM	15	0.3%	45	0.8%	60	0.6%
Total	4355	100.0%	5500	100.0%	9855	100.0%

Source: Statistics Canada (2016)

The high number of commuting workers in Langley has to be put in context, however, and may in fact be comparable to the migration patterns of workers in other Metro Vancouver municipalities. First, Langley's relatively small geographical size, in comparison to other communities, would suggest that residents are more likely to commute to find opportunities in their chosen occupation. Second, the appropriate measure is distance travelled to and from work and not simply the crossing of municipal boundaries.

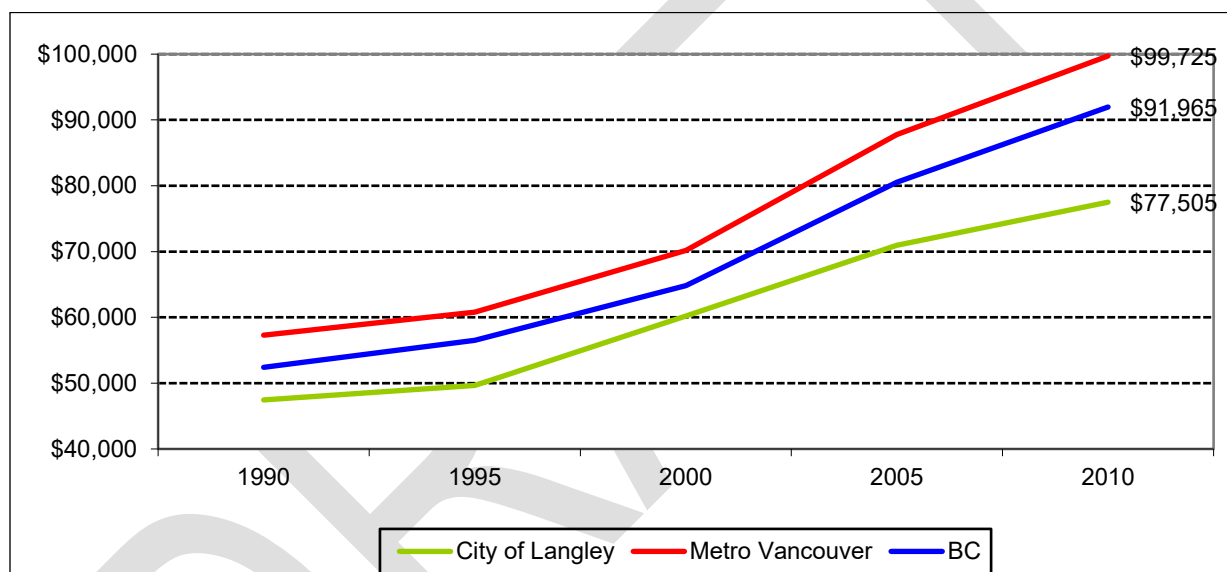
Langley's proximity to major economic zones in Surrey/Cloverdale and Langley Township could account for significant worker volumes, in some cases within very short travel distances. Finally, businesses in Langley are a major source of jobs for workers living in other municipalities, and there are as many workers commuting in,

as residents commuting out. This indicates that there is a mismatch between resident workers and local jobs, a situation which is too complex to address in this brief assessment.

PERSONAL INCOME

Family income levels for the City of Langley, Metro Vancouver and BC for the twenty-year period from 1990 to 2010 are shown in Figure 5-4. Income levels in the City of Langley are below BC and Metro Vancouver averages, and while family income is rising in the City of Langley, incomes are rising more quickly in Metro Vancouver and BC.

Figure 5-4: Average Census Family Income for City of Langley, Metro Vancouver, and BC, 1990-2010



Source: Statistics Canada, Census 1991, 1996, 2001, and 2006, National Household Survey 2013

As seen in Table 5-9, the major difference in the distribution of family incomes is Langley's (both the Township and City) is a higher percentage of households earning over \$100,000 than generally observed in Metro Vancouver and British Columbia. Conversely, the City and Township of Langley have a smaller share of families earning less than \$25,000.

Table 5-9: Percentage of Family Income By Group for Langley (Township and City), Metro Vancouver, and BC, 2012

	\$000				
	0 - 25	25 - 50	50 - 75	75 - 100	+100
Township and City of Langley	20%	22%	17%	13%	27%
Metro Vancouver	27%	23%	16%	11%	22%
BC	26%	24%	17%	17%	22%

Source: Statistics Canada (2014)

Note: Family includes coupled families +lone parent family +non-family persons.

BUILDING PERMITS

Building permit activity for the City of Langley between 2003 and 2015 (Table 5-10) fluctuated regularly, although the running average is growing. The bulk of permit value is accounted for by residential activity, followed by commercial, then institutional. Industrial permits have historically contributed a minor share to the total value.

Table 5-10: Building Permit Values By Category for City of Langley, \$'000, 2003-2015

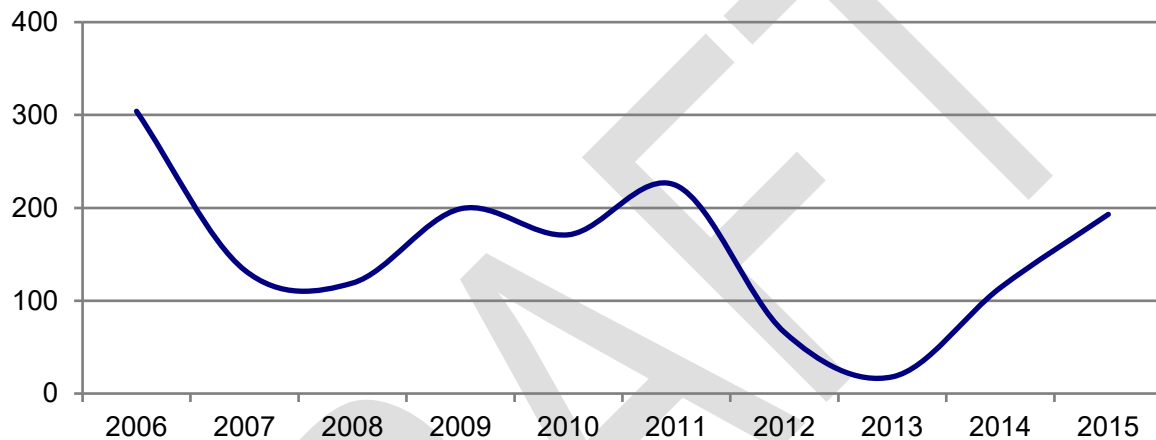
Year	Residential	Commercial	Industrial	Institutional	Total
2003	9,126	9,749	284	211	19,370
2004	17,767	30,435	192	3,107	51,501
2005	37,472	5,081	183	115	42,851
2006	22,278	10,905	4,392	95	37,670
2007	19,372	3,610	71	30	23,083
2008	29,521	15,508	934	16,444	62,407
2009	24,758	2,245	77	9,852	36,932
2010	34,095	21,526	248	2,196	58,065
2011	25,132	13,842	1,496	1,673	42,143
2012	10,363	24,069	462	4,611	39,505
2013	17,512	15,445	809	987	34,753
2014	8,951	25,868	552	14,049	49,420
2015	23,909	13,004	865	190	37,968

Source: BC Stats (2016a)

HOUSING STARTS

During the last 10 years, the City of Langley has averaged 154 housing starts, with the peak of activity occurring in 2006 when 304 units were constructed. In spite of a sharp drop in 2013, the number of units rebounded in 2014 and 2015. Projected robust population growth will ensure that housing starts will remain buoyant in the City going forward.

Figure 5-5 Single and Multiple Housing Starts in the City of Langley, 2006 to 2015

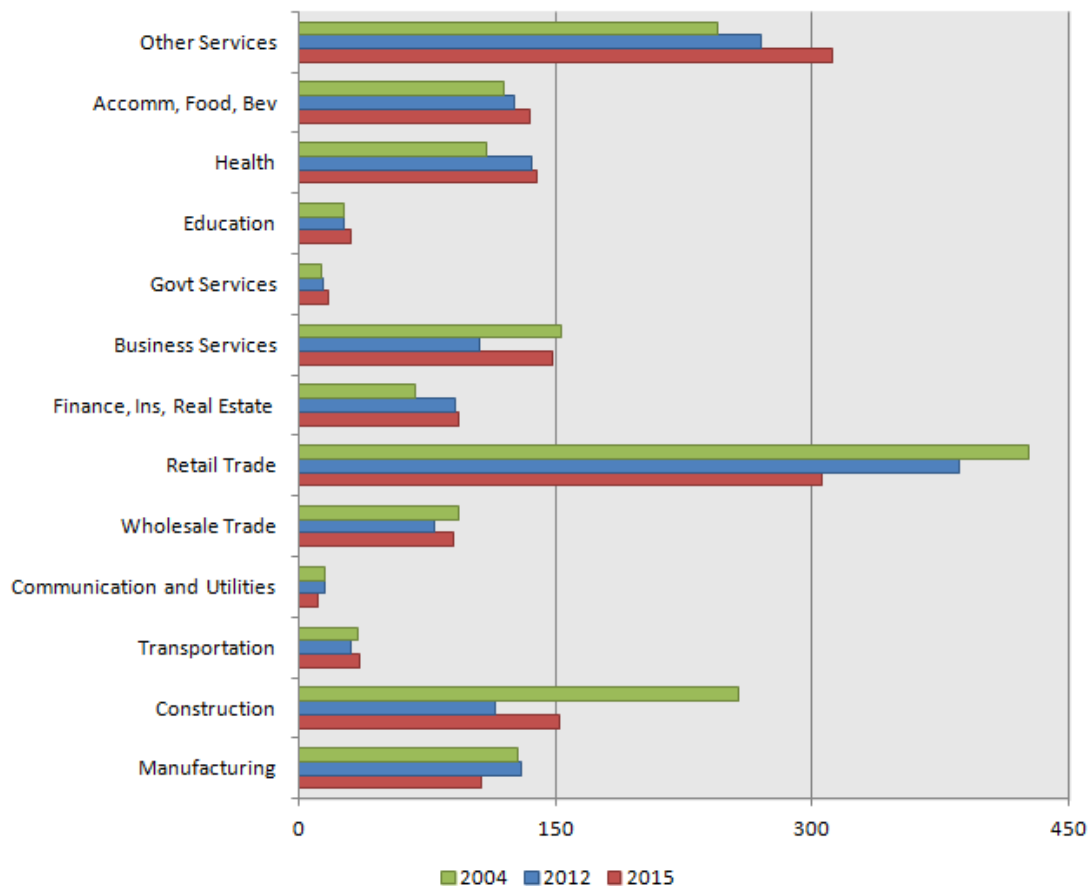


Source: BC Stats (2016b)

BUSINESS LICENCES

Close to 80% of licences are in services including personal and business services, trade and hospitality. Construction and manufacturers firms dominate goods industries. This profile has remained relatively constant over the last 12 years, although shares appear to be changing, with construction and retail trade being replaced by Other services.

Figure 5-6: Business Licences by Major Industry, 2015, 2012, 2004



Source: City of Langley (2016)

BUSINESS CLIMATE

In its 16th annual survey of industrial development costs in the Lower Mainland, NAIOP (NAIOP 2015) found that the City of Langley rated high on municipal approval times, light industrial mills rates and the light industrial to residential tax ratio. The survey cited the impact of the property tax burden, and the variations in that burden across the region, as a factor when business undertakes site location decisions. Property taxes are not generally included in basic rents but they are in operating additions and thus are a factor in the total rent paid by businesses.

The property tax burden for businesses varies from jurisdiction to jurisdiction however, compared to residential tax rates, businesses ('industrial' and 'commercial' property designations) pay a significantly greater proportion of the property taxes. Approval times can also affect the investment climate in that they can affect both financial and business risk of new developments.

The survey results also indicate that the ideal median tax ratio (industrial/commercial tax rate to residential tax rate) is 3 to 1. Less than half the municipalities in the region are in line with this ratio. The five municipalities with the lowest commercial to residential property tax burden (rated from lowest to highest) were:

- Chilliwack
- Abbotsford
- Surrey
- Langley (City)
- Maple Ridge

Maintaining competitive approval times and reasonable or low municipal property taxes for business will have many beneficial impacts on the City, its neighbourhoods and employment potential.

OVERVIEW OF KEY SECTORS

Manufacturing and Industrial

Indicators

Total Labour Force	20,520 (Male – 9,720; Female – 10,760)
(31 – 33) Manufacturing Labour Force	1,355 (Male – 1,035; Female – 320)
Largest Manufacturing Category: (332) Fabricated Metal Products	220 (Male – 170; Female – 50)
Manufacturing Businesses Licences	107
Industrial floor space (square feet) *	2.5 million
Industrial Availability Rate (% 4th Quarter 2015) **	7.8%
Average Annual Building Permit Value (\$millions) +	\$800,000

Major Employers

Product

CKF Incorporated	Plastic and rubber products
IPEX Inc.	Plastic and rubber products
Vision Plastics	Plastic and rubber products
Morrison Windows	Plastic and rubber products
MBM Metal Fabricators	Metal fabrication
Ecco Heating Products	Metal fabrication
Tin Man Metals Works	Metal fabrication
Canadian Culvert	Metal fabrication
National Glass	Mirror and laminated glass manufacture
Pacific Radiator	Radiators, cores, heavy-duty specialty products
Canada Bread Company	Bakery products
Vector Aerospace	Transportation equipment
Neozun Manufacturing	Textiles
LZB Enterprises	Furniture and related
Sun Truss	Wood products
Langley Concrete and Tile	Non-metallic mineral products

Strategic Advantages

- | | |
|--|---|
| ▪ Transportation infrastructure & services | ▪ Sizeable regional market |
| ▪ Proximity to Asian and US markets | ▪ Stable and accessible capital markets |
| ▪ US border proximity | ▪ Quality of Life (schools, health, safety) |

Development Issues

- | | |
|-------------------------------|----------------------------|
| ▪ Land availability and costs | ▪ Value of Canadian dollar |
| ▪ Land use conflicts | ▪ Infrastructure quality |

Key Trends

- | | |
|--|---|
| ▪ Increasing technology inputs | ▪ Skill shortages – trades, marketing, management |
| ▪ Rising productivity (declining employment) | ▪ Changing industry dynamics - value chain |
| ▪ Global outsourcing | |

Source: * City Langley (2016b) ** CBRE (2015)

Note: * For five year period ending in 2015

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Transportation and Storage

Indicators

Total Labour Force	20,520 (Male – 9,720; Female – 10,760)
(48 – 49)Transportation & Storage Labour Force	760 (Male – 535; Female – 225)
Largest Transportation Category – (484) Truck Transportation	285 (Male – 215; Female – 70)
Transportation Businesses Licences	35

Major Employers

Key West Express	Willowbrook Recycling
------------------	-----------------------

Strategic Advantages

- Centralized location in the Lower Mainland
- Multi-modal services
- US border access
- Range of cargo handling facilities and services
- Rail spur access
- Affordable housing

Development Issues

- Traffic congestion
- Need for continued infrastructure investments
- Skills recruitment
- Lack of rapid transit services
- Land availability
- Land costs

Key Trends

- Regional growth management
- Road and rail congestion
- Port development
- Asia Pacific trade growth
- Globalization
- Shrinking lead times
- Supply chain practices
- Integrated logistics

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Retail and Commercial

Indicators

Total Labour Force	20,520 (Male – 9,720; Female – 10,760)
(41; 44-45) Retail and Wholesale Trade Labour Force	2,970 (Male – 1,410; Female – 1,560)
(41) Wholesale Trade	955 (Male – 550; Female – 405)
Largest Wholesale Category – (416) Building materials & supplies	215 (Male – 120; Female – 95)
(44-45) Retail Services Labour Force	2,015 (Male – 860; Female – 1,155)
Largest Retail Category – (445) Food and Beverage Trade and Services Business Licences	465 (Male – 115; Female – 350)
Trade Area Population Estimate *	1,270
Total Retail/Commercial Floor Space (millions of square feet) *	231,000
Average Annual Building Permit Value (\$millions) *	4.0
	18.5

Major Employers

- Hudson's Bay
- Gateway Casinos
- Overwaitea
- Army & Navy
- Sears Canada
- Preston Chevrolet
- Tom Lee Music
- Rona

Strategic Advantages

- Central location
- Trade area opportunities
- Town Centre designation
- Continued population and business growth
- Closest regional town centre to US border
- Viable downtown centre
- Streamlined development approval process
- Competitive tax rates
- Positive local investment climate
- Affordable housing
- Cluster of small, independent establishments

Development Issues

- Few greenfield properties
- Lack of an office cluster
- Willowbrook redevelopment
- Downtown revitalization
- Traffic congestions
- Strong clusters in neighbouring municipalities
- Competition from other shopping districts

Key Trends

- Demographic trends
- Consumer trends
- Changing retail cycle
- Expansion of foreign retailers
- E-commerce and e-retailing
- Mixed use developments
- Continued growth of home-based business
- Integrated land use and transportation planning (downtown)
- Repurposing of downtown buildings
- Integration of residential and entertainment facilities downtown

Source: * City of Langley (2016a)

Note: † For five year period ending in 2015

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Tourism

Total Labour Force	20,520 (Male – 9,720; Female – 10,760)
(72) Accommodation and Food/Beverage Labour Force	945 (Male – 345; Female – 600)
(721) Accommodation Services	75 (Male – 0; Female – 75)
(722) Food Services and drink places	870 (Male – 345; Female – 525)
Accommodation, Food and Beverage Business Licences	135

Key Regional Attractions

- | | |
|---|---|
| ▪ Downtown Langley | ▪ Heritage, culture sites (e.g. Fort Langley) |
| ▪ Events and Fairs (e.g. Cruise-in, Arts Alive) | ▪ Greater Vancouver Zoo |
| | ▪ Wineries |
-

Strategic Advantages

- | | |
|--------------------------------------|--|
| ▪ Proximity to large regional market | ▪ Festival and events |
| ▪ Agriculture and farm sector | ▪ Casino, hotel and convention centre |
| ▪ Proximity to main highway routes | ▪ Heritage features and cultural tourism |
| ▪ Downtown Langley | ▪ Art galleries and studios |
| ▪ Proximity to wineries | ▪ Parks and greenspaces |
| ▪ Good range of hospitality services | ▪ Sporting activities and events |
-

Development Issues

- | | |
|--|----------------------------|
| ▪ Competition from other BC regions | ▪ Lack of market readiness |
| ▪ Traffic congestion, access to key features | ▪ Decline in US visitors |
-

Key Trends

- | | |
|---|-------------------------------|
| ▪ Changing demographics (baby boomers, millenials) | ▪ Increasing US visitors |
| ▪ Changing activity trends (less active, more safe) | ▪ Increasing Asian visitors |
| ▪ Fluctuating value of Canadian dollar | ▪ Cost of energy (gas prices) |
| ▪ Internet usage for travel planning | ▪ US border security issues |
| ▪ Sustainability issues | ▪ Labour and skills shortages |
-

Education

Indicators

Total Labour Force	20,520 (Male – 9,720; Female – 10,760)
(61) Education Labour Force	970 (Male – 345; Female – 625)
(6111) Elementary and Secondary Schools	645 (Male – 190; Female – 455)
(6113) University	130 (Male – 65; Female – 65)
School District 35 enrollment (2015/16) *	20,512
School District 35 enrollment (avg 2006-2011) *	20,033
School District 35 projected enrollment (2020) **	21,123
Trinity Western University enrollment (2010/2011) °	4,000
Kwantlen Polytechnic University enrollment (2014/2015) +	19,740

Key Trends

Higher Education

- Increasing internationalization and globalization of higher education.
- Evolution of higher education as a competitiveness attribute among advanced economies.
- Increasing demand and enrolments in post-secondary institutions.
- Rising average age of students.
- Emergence of heterogeneous student bodies due to increase enrolment by women, ethnic groups and students from different socio-economic backgrounds.

K-12

- Declining enrolments and school closures.
- Increasing international students.
- Increasing ESL enrolments.
- Increasing enrolments in private schools.
- Growth and impact of open, distance and virtual learning options.
- Increasing focus on accountability, quality and performance.
- Increasing access to communication technology.

Source: * BC Ministry of Education (2016a) ** BC Ministry of Education (2016b) + BC Ministry of Advanced Education (2015)

APPENDIX 2 – STUDY CONTACTS

Name	Organization
Fred Adab	Multigon Management Ltd.
Paul Albrecht	City of Langley
Darren Brattston	Beedie Group
Francis Cheung	City of Langley
Alan Davis	Kwantlen Polytechnic University
Tanya Gabara	Gateway Casinos
Marlyn Graziano	Kwantlen Polytechnic University
Deborah Kulchiski	Tourism Langley
Teri James	Downtown Langley Business Association
Sheldon Loeppky	Trinity Western University
Ron Madsen	RDM Enterprises
Rob McFarlane	School District #35
Ray McNeil	Cascades Casino
Gayle Martin	City of Langley
Kim Mullin	Thrive Communications
Shandor Nicoras	CKF
Nic Paoella	Marcon Development Ltd.
Sonya Perkins	Forever Yours Lingerie
Peter Rainey	Ipex Inc.
Tammy Rea	TD Bank, Chamber of Commerce
Dale Regehr	Tannin Development
Ted Schaffer	City of Langley
Jamie Schreder	Royal LePage
Randy Sears	Gateway Casinos
Carole Ward	Westminster Savings Credit Union
David Wesik	Wesgroup, Langley City Centre

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