

CAPITAL REGION

SOCIO-ECONOMIC FACTORS AFFECTING LAND USE

in
the

CAPITAL REGION

DECEMBER
1971

TO BE RETURNED TO ROOM ~~209~~ 203

~~RESOURCES DEVELOPMENT SECTION,
DEVELOPMENT SERVICES DIVISION,
INDIAN-ESKIMO ECONOMIC DEVELOPMENT BRANCH,
DEPARTMENT OF INDIAN AFFAIRS AND NORTHERN
DEVELOPMENT, CENTENNIAL TOWER.~~

WHY NOT RETURN IT, YOU WILL THEN
KNOW WHERE TO BORROW IT AGAIN.

DEPARTMENT OF INDIAN AFFAIRS
and NORTHERN DEVELOPMENT

VANCOUVER
BRITISH COLUMBIA

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SOCIO-ECONOMIC FACTORS
AFFECTING
LAND USE

IN

THE CAPITAL REGION
DECEMBER 1971

DEPARTMENT OF INDIAN AFFAIRS
AND NORTHERN DEVELOPMENT
VANCOUVER, B. C.

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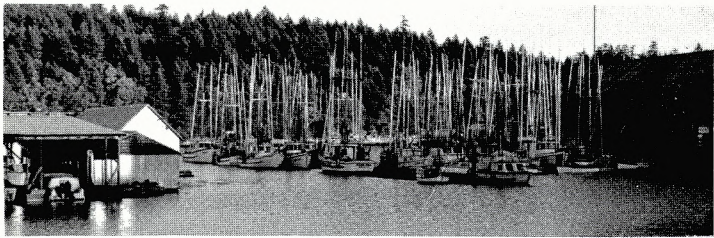
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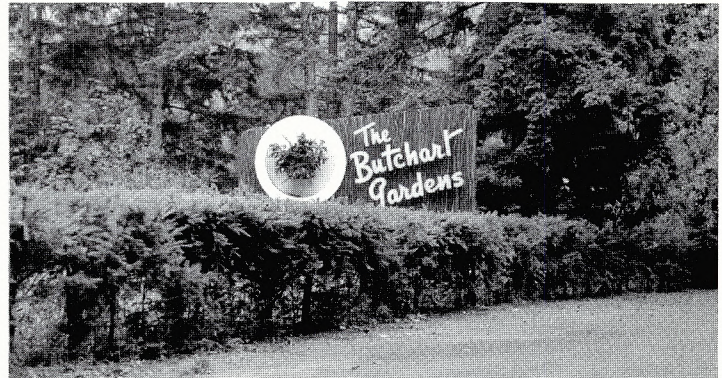
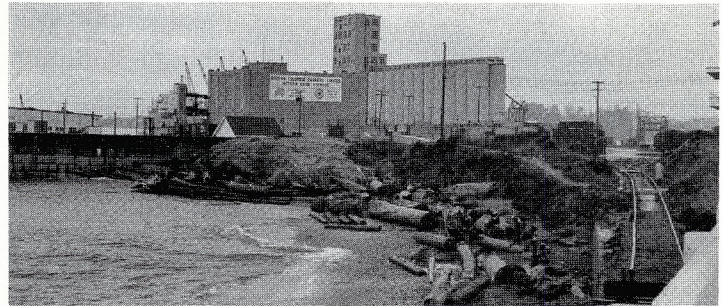
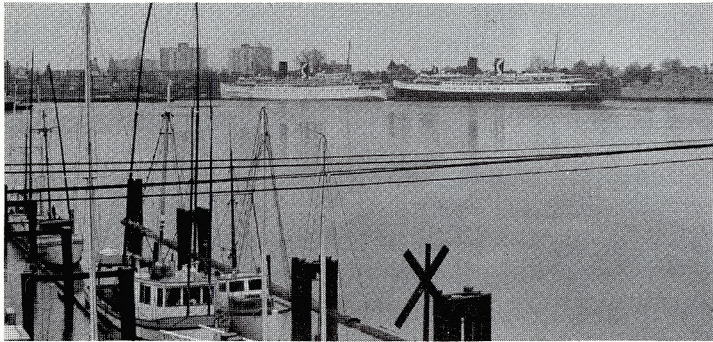
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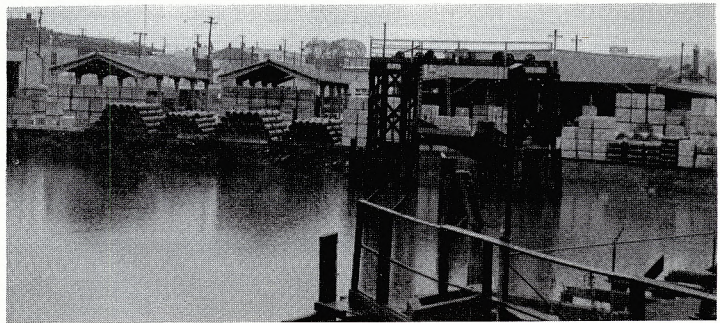
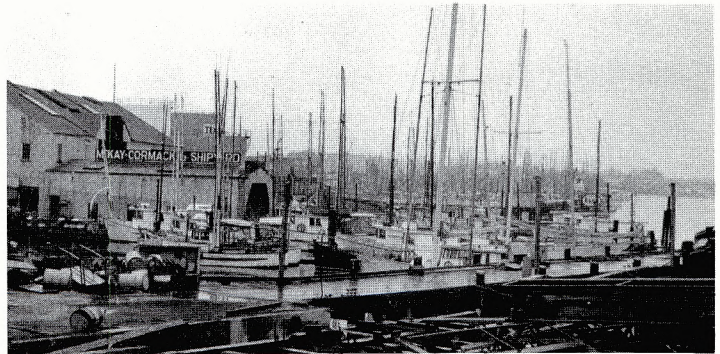
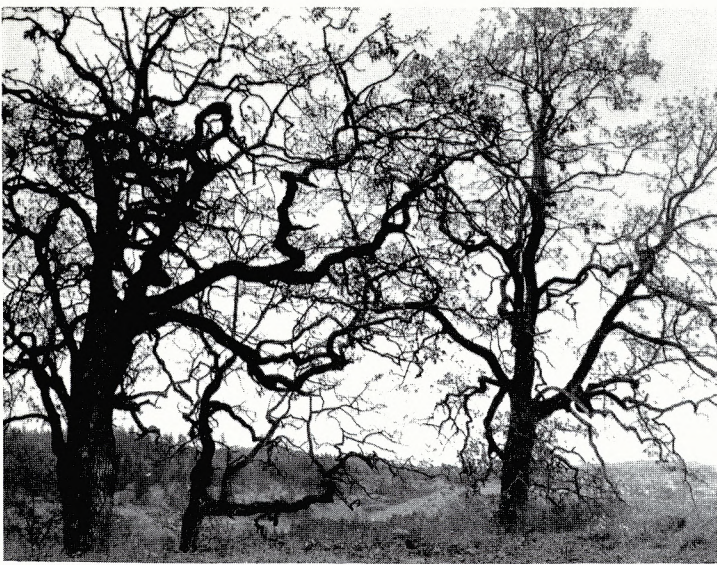
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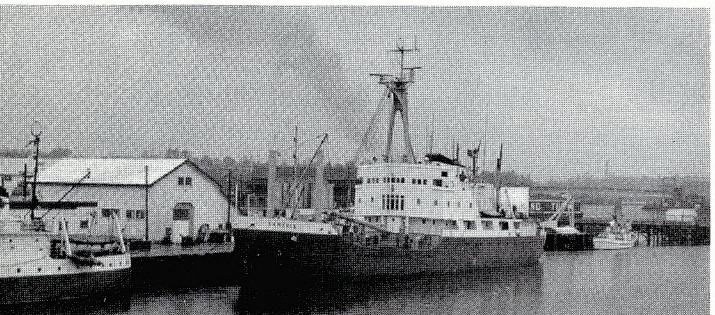
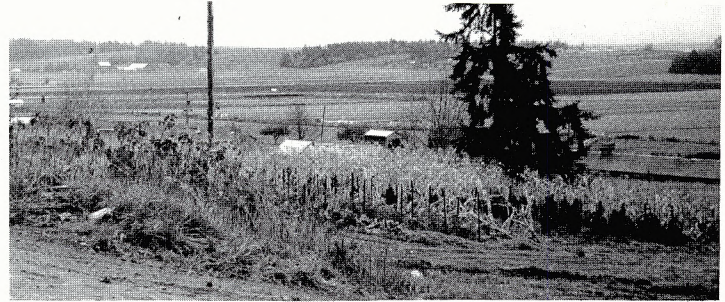
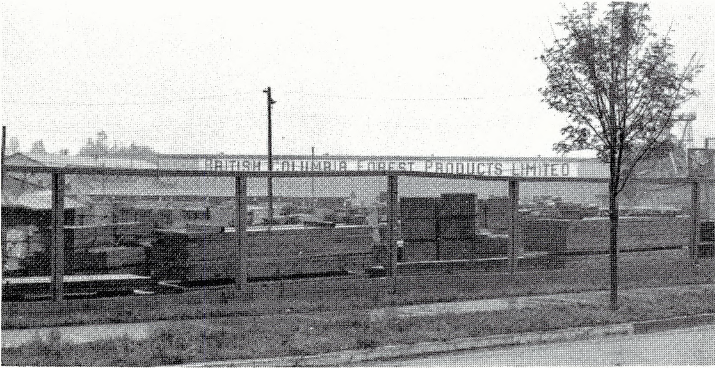
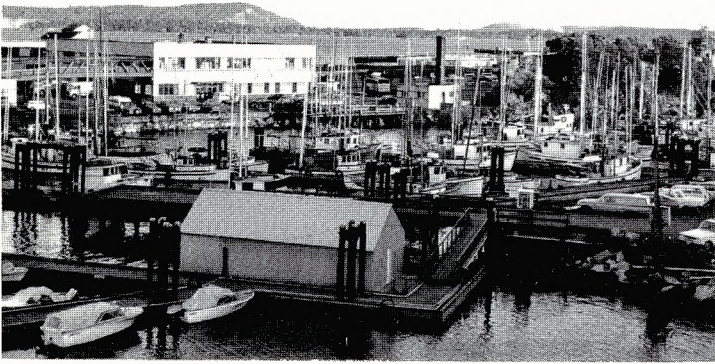
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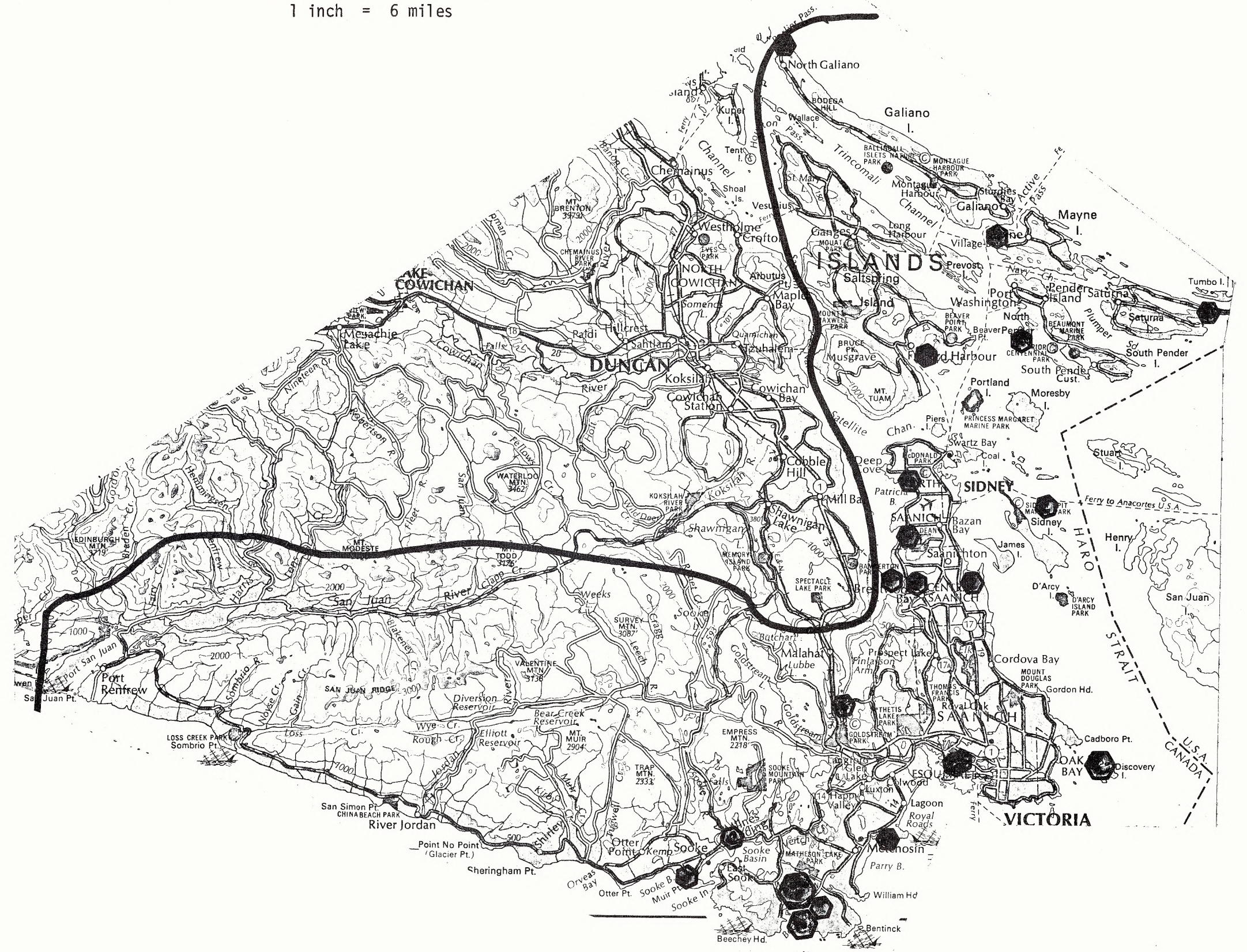


THE CAPITAL REGION

(In Relation to British Columbia)



Map Showing
LOCATION OF INDIAN RESERVES
in Relation to
BOUNDARY OF CAPITAL REGION
1 inch = 6 miles



PURPOSE AND SCOPE

An accurate analysis of regional socio-economic conditions is an integral part of a land use report, a development feasibility study, or an appraisal of market value. A land use report essentially relates physical characteristics of a specific parcel of land to socio-economic conditions in order to determine the highest and best use of the parcel. A development feasibility study examines the capability of a parcel of land to produce an income if developed for a specific use. An appraisal of market value or an appraisal of loss or damage caused by a taking of land begins with an analysis of regional socio-economic data. This analysis is the one basic component of an appraisal which influences all other calculations.

Basically, these three exercises:- land use studies, land appraisals and development feasibility studies, are involved with establishing land use priorities which must be compatible with regional socio-economic conditions. In fact, it is not unusual to abandon a development project after completing a regional socio-economic study. If socio-economic conditions do not invite profitable development of a parcel for a specific use, there is nothing to be gained by continuing the study to include a detailed analysis of the engineering aspects of the proposal.

The purpose of this report, therefore, is to examine the resources of the region; to offer a historical account of the development of these resources; to examine significant existing developments within the region and finally to co-ordinate these findings to reach significant conclusions regarding future trends. Finally, these conclusions will relate to the use and development of land within the region in order that land managers, such as individual Indian Bands, can use the information as an aid in deciding whether or not a land appraisal, a development proposal or a land use study would be beneficial. Further, it is anticipated that this presentation can be used as a reference document by land use consultants and appraisers in the completion of assignments contracted with the Band or the Indian Affairs Department. When several such assignments have been commissioned within a region, it is repetitious and costly for each researcher to retrace the same routes as his colleagues in search of socio-economic data. He can use this document as a reference text and briefly

comment on its content in his report, thus reducing the bulk of material presented and the final cost of the project.

The usefulness of the document will decrease as time passes. Current statistics and predictions of future trends will eventually become history and the report will be obsolete. However, at the present time Regional Planning is bearing a strong influence on the development of the entire Capital Region. Recreation, tourism and urban development have expanded by leaps and bounds and with very little direction. It is anticipated that the Regional District administration will curb development in some areas and encourage further development in others and, therefore, changes in development patterns will result. Land owners, land developers and speculators will observe these changes with interest and, therefore, a report of this nature is timely in that it will likely serve its greatest utility during the next five years.

This report does not attempt to analyze world-wide economic conditions as they affect the value and use of land within the region. It is recognized, however, that international economic conditions have a direct effect on the sale and marketing of goods produced within the region and, therefore, significant international economic developments will affect socio-economic conditions of the region. For example, the attitude that various nations have towards the International Common Market, the rise and fall of the interest rate in the United States or the exchange rate of the Canada-U.S. dollar all have a significant effect on the development of the region.

It is emphasized that the scope of the report is restricted to only those socio-economic factors that affect the value and use of land and, therefore, the data will have limitations if used for other purposes.

PART I
GENERAL ANALYSIS

DEVELOPMENT HISTORY

While other parts of British Columbia were being discovered and settled by early pioneers in search of furs and good agricultural land, Fort Victoria was established for a political reason. James Douglas chose the location for a Hudsons Bay post in 1842 when the location of the international boundary was in question. The Hudsons Bay Co., at that time, operated its main post on the west coast at Fort Vancouver in Washington which was below the 49th parallel. The company felt that if the boundary was established at the 49th parallel they would be in a vulnerable position with all its stores at Fort Vancouver.

The southern tip of Vancouver Island was selected by James Douglas because it was accessible to the North Pacific mainland trading district and a considerable acreage of semi-opened land existed which could be cultivated without having to be cleared.

By 1845 the significance of Fort Vancouver as a trading post had decreased substantially and supply ships were directed to Fort Victoria rather than Fort Vancouver. The following year the International Boundary was established along the 49th parallel, excluding the southern tip of Vancouver Island which was well established as a Hudsons Bay trading post. In 1849 Vancouver Island was declared a Crown colony by the British Government and that same year 21 settlers arrived increasing the total population to 471. By this time a school, church and several houses had been erected, a small dairy herd had been established at the head of James Bay and other farms were struggling near Colwood and Craigflower. Although the dense forests were considered to be an obstacle to agricultural expansion, products from the forests were traded abroad as early as 1848. Spars for sailing vessels were the most common item exported. The first sawmill was constructed by Hudsons Bay Co. at the head of the Esquimalt Harbour in 1848. Although the mill was erected primarily to meet the local demand for lumber, some shipments were made to Fort Langley and San Francisco, Shanghai, Australia, Hong Kong, Sandwich Island, South America and England. In 1853 the population of the entire Vancouver Island was only about 450 persons. Most of these were settled at Victoria and Sooke with the remainder, approximately 125, at Nanaimo and Fort Rupert.

James Douglas was appointed Governor in 1851 and history records no significant events until 1858 when the Fraser and Cariboo gold rushes commenced. At this time the Fort included one small wharf and a half dozen houses. Fort Victoria became the outfitting center for the miners and almost over night Victoria became a lively frontier town. Historical records estimate that over 20,000 miners arrived at Victoria from California and Australia over a period of only a few weeks. The British Columbia Police force was established that year to preserve law and order in the booming community. Five newspapers were established including the British Colonist, which was the forefather of the Daily Colonist, still being published in Victoria. Also in 1858 the Crown colony of British Columbia was created with James Douglas as Governor. The following year the first Parliament Buildings were completed in Victoria and by 1860 the population of Victoria was reported to be 2,020 people while Seattle contained only 200-300 persons. Indians were attracted to the area from northern regions of the island to trade or to simply observe the activity. It is estimated that over 8,000 Indians were living in and around Victoria by 1859. In 1862 Victoria was incorporated as a city and the following year the Victoria Chamber of Commerce was organized. By this time the commercial center of the city was overrunning the old fort and by 1864 the last of the fort buildings was demolished.

Victoria was the only port on the Pacific northwest during these times and Esquimalt was established as a Royal Navy base as early as 1846. In 1855 the Royal Navy Hospital was erected at Esquimalt in anticipation of receiving casualties from the Crimean War. In 1865 a permanent Naval base was established adjacent to the hospital. By this time over 10,000 permanent settlers were in the area and the number increased each winter as men returned from the gold fields to enjoy the mild climate and the gaiety of the robust town.

The Crown colonies of Vancouver Island and British Columbia were united in 1866 and in 1868 the capital was moved from New Westminster to Victoria.

Although the Cariboo gold rush slumped during the 1880's Victoria continued to grow both commercially and industrially. The Canadian Pacific Navigation Co. was incorporated at Victoria in 1882. Over 50 sealing boats made their headquarters at Victoria Harbour supporting a

PHYSICAL DESCRIPTION

The area studied comprises the most southern extremity of Vancouver Island. It reaches from Port Renfrew in the west to Victoria City in the east, including Saanich Peninsula and the Gulf Islands. The district extends inland from the southwest shores of Vancouver Island, a distance of approximately 14 miles to include the San Juan River Drainage. It includes the communities of Sooke, Metchosin, Langford, Esquimalt, Victoria City, Oak Bay, Saanich, Central Saanich, North Saanich and Sydney. The most prominent Gulf Islands included within the region are Salt Spring, Galiano, Mayne, Saturna, North Pender and South Pender. The total east-west length of the region is approximately 50 miles while its north-south depth ranges between 10 and 15 miles. The Gulf Islands extend northward beyond this defined area. In total, the region contains 933.7 square miles. Urban development has been restricted to the eastern portion of the island and to a lesser extent on the Gulf Islands. The western portion supports sparse ribbon development along the highway to Port Renfrew with the remaining area comprised of forest land.

GEOLOGICAL HISTORY

Most of the eastern coastal lowland of Vancouver Island is composed of shale, sandstones and conglomerates. Generally the island is underlain by volcanic rocks which are rich in calcium, iron and magnesium. Limestone occurs frequently along with chert, argillite, tuff and greywacke. Shales and sandstones are other common materials.

The soils found today have resulted from several glacial actions which moved across southwest British Columbia. The last two glacial invasions were responsible for most of the present deposits.

Prior to the last glaciation the eastern coast of Vancouver Island was buried by rivers in finely cut deep channels before being scoured by the glacial action. This last movement of glacier ice deposited much of the sand and gravel which now exists along the east coastal bench. This glaciation period saw the depression between Vancouver Island and the mainland filled with ice. As the ice sheet melted rivers formed beneath the ice and along its margins. When the ice completely disappeared an irregu-

lar surface of rigids, humps and hollows and terraces composed of gravels and sands remained as washouts from these streams. The sea entered the Strait of Juan de Fuca after the glaciers retreated and it is believed that there was an upheaval since the retreat of the glaciers because marine deposits have been found 50 feet above sea level along the west coast of the island and 300 feet at Victoria and Alberni. Shells and marine deposits similar in character to those now found along the southern coast of Alaska would suggest that climate at that time was much different than it is today. The seashore in its present location has existed for several thousand years and significant deltas and flat flood plains have developed at the mouths of most larger rivers.

TOPOGRAPHY AND DRAINAGE

The mountains of Vancouver Island extending north to the Queen Charlotte Islands form the Insular Mountain Range. The seaway between the islands and the mainland is referred to as the Coastal Trench. The lowlands, close to sea level, are part of the Coastal Trench while further inland lies the foothills of the Insular Mountains. The transition zone between the mountains and the trench is often referred to as the Coastal Plain. The eastern portion of the Capital region lies on the Coastal Plain characterized by an undulating surface with a rugged coastline, wave cut cliffs, steep promontories and rocky islands or islets offshore.

The western portion of the region displays low mountain peaks reaching to 3,000 feet above sea level. Slopes to the seashore are generally fairly steep with plateau type terrain sitting at the 2,000 foot level. The shoreline of the eastern portion of the western sector displays extremely irregular configurations. Large shallow bays bounded by rocky fingers occur frequently. Sooke Basin extending inland for nearly 4 miles is an unusual coastline formation containing considerable recreational appeal.

Proceeding westward past Jordan River to Port Renfrew, the coastline is not so irregular but contains several distinct promontories and large crescent shaped bays. Steep cliffs up to 100 feet high have been eroded from the soft sedimentary rocks.

The San Juan River parallels the north boundary of the region and enters the sea near Port Renfrew. Other smaller rivers and creeks such as Lost Creek, Jordan River and Sooke River flow southerly to the sea in the western sector. Within the eastern section, several smaller streams such as the Colquitz, Mill Stream, Graigflower Creek, and Goldstream meander slowly to the sea and often dry up completely in the summer time.

SOIL

Soils of the Coastal Plain are extremely varied in relatively small areas. The 1959 Soil Survey Report No. 6 has classified and mapped several main series which are distinguished from each other by their agricultural capability. A description of the most prominent soil types encountered within the region is presented below.

Rough mountainous terrain unsuitable for agricultural purposes primarily because of adverse topographic conditions predominates in the western sector and is most extensive in a broad band reaching from the Sooke Basin, in a northeasterly direction towards Elk Lake and Finlayson Arm. Mount Newton, situated in Central Saanich and encompassing most of Indian Reserve No. 3, is also represented by rough mountainous terrain. Isolated islands or knolls have been mapped throughout the Peninsula which are described as rough and mountainous or rough and stony. Mount Tolmie, McNeill Bay, Gordon Head, Mount Douglas, Barehill and Observatory Hill are such areas.

Probably the most extensive arable soil series within the region is the Saanichton clay. It occurs extensively in the immediate vicinity of Victoria City, extending northward to Elk Lake. Other extensive areas are found in an area extending north from Brentwood Bay and including Indian Reserve No. 1 and an equally large area at the northern end of the Peninsula in the vicinity of Patricia Bay and Sydney. In all, the series covers 15,355 acres within the Victoria-Saanich Peninsula area. It is primarily a clay, ranging to a clay loam. The top layer, generally 3 inches thick, is a dark brown granular permeable clay overlaying 16 to 18 inches of yellowish brown sub-angular blocky permeable clay. Beneath this a slowly permeable amorphous marine clay is found. Topography is gently sloping and the soil is well drained with high to medium perme-

ability. This fine textured, fertile soil is considered to be the best agricultural soil on Vancouver Island. It is well supplied with nitrogen and phosphorous with a well developed soil structure. Its moisture holding capacity is high and, therefore, it is quite drought resistant. Areas presently under production are generally cropped intensively and are successfully growing small fruits, vegetables, bulbs and foliage crops.

The Tolmie series ranging from a fine sandy loam to a sandy clay loam is found in an irregularly shaped band extending along the east coast of the Peninsula from Oak Bay to Bazan Bay. A relatively small portion of East Saanich Indian Reserve No. 2 contains this series. The top 6 to 9 inch layer is dark brown to black in color with a texture ranging from granular fine sandy loam to sandy clay loam. The top layer generally sits over a 4 inch layer of gray to grayish brown slowly permeable sub-angular blocky sandy clay loam beneath which the clay content increases and it becomes less permeable. Although the top layer is fairly permeable the lower horizons are very slowly permeable, therefore, the soil is described as being poorly drained. It is a fertile soil often requiring drainage and suitable for a variety of crops such as potatoes, small fruits, hay and pasture.

The Saanichton series and the Tolmie series are the main agricultural soils within the region. Other less important soils, from an agricultural viewpoint, are described as follows.

The Langford series is well represented in the vicinity of Victoria City and Metchosin. Although it is a fertile agricultural soil, most of it is under urban development and, therefore, it does not contribute significantly to the agricultural output of the region. The top layer, generally 10 to 12 inches thick, is a dark brown very permeable loamy sand or sandy loam. Below 12 inches the soil becomes gravelly with some stoniness evident.

A fairly extensive area of Shawnigan gravelly sandy loam is found north of Elk Lake and in the vicinity of Broom Hill, west of Sooke. This soil belongs to the Brown Podzolic group and is characterized by an 18 to 20 inch top layer of brown to light yellowish brown permeable granular gravelly sandy loam overlying a permeable gravelly sandy loam till. Although topography is generally the factor limiting development of these soils, high clearing costs, stoniness and low fertility also prohibit

intensive development.

The Cadboro gravelly sandy loam is found most extensively north of Victoria City and extending eastward to Cadboro Bay and northward to Cordova Bay. 3,945 acres have been mapped. The top 8 to 10 inch layer is a dark brownish black to black permeable granular sandy loam which graduates into a yellowish brown compact gravelly sandy loam in the sub-layers. This soil type generally supports the oak-grass forest association, common to the Victoria area. It is a fertile agricultural soil well supplied with organic matter, nitrogen and phosphorous. It displays high permeability and a low moisture holding capacity. It is best suited for such crops as strawberries, vegetables and cut flowers. It is not well suited to dairying or pasture unless irrigation is supplied. Much of this soil series has been consumed by urban development.

Rough mountainous terrain prevails over 95% of the area of the Gulf Islands. Although agriculture is practiced in small communities, the products are generally for local use only. The most extensive acreages of arable land lies on Salt Spring Island between Ganges and Booth Bay and extending northward to St. Mary Lake and onto the northeast coast of the Island. This area is represented by the Tolmie series which was described above.

In summary it is evident that the Capital region contains a greater percentage of arable soils than the neighbouring regions to the north. Coarse textured sandy gravelly loams prevail in the regions to the north while finer textured sandy loams and clays prevail in the Capital region. Thus, it becomes apparent why agriculture is more intensively practiced in the Capital region than in other regions on Vancouver Island. Further, agriculture within the Capital region enjoys the advantage of being located adjacent to a large population centre and, therefore, marketing of the product generally presents no problem.

FOREST COVER AND NATURAL VEGETATION

The climax forest type of adjacent regions has been described as the Douglas Fir, Western Hemlock and Salal association. This is the most common forest association of Vancouver Island. Although it covers much

of the western portion of the region, the eastern portion is exposed to different climatic conditions and an entirely different forest association has developed. The open park-like characteristics represent the forest-grassland association. It was these characteristics which attracted the attention of Sir James Douglas when he first visited the area in 1843. The natural forest is characterized by such species as Garry Oak (*Quercus Garryana*) and Douglas Fir (*Pseudotsugh Mensiesii*). *Arbutus* (*Arbutus Menziesii*) is prevalent on shallow rocky soils which are commonly found along the coastal fringe of the region. Grand Fir (*Abies Grandis*) often occurs in poorly drained areas. It should be noted that the oak-grass type of vegetation never occurs above 150 feet a.s.l.

Several species found within the area are common to the Capital region only and they all contribute to the overall pleasing park-like appearance which attracts so many tourists to the area. Such tourist attractions as the Bouchard Gardens have taken advantage of the regions natural ability to grow exotic species and a botanical paradise has resulted.

CLIMATE

Climatic factors bear an important influence on forest growth, agricultural crop growth and the quality of the recreational environment. A summary of climatic normals, therefore, offers an indication of what land uses are likely to thrive. Victoria is often described as having the most "comfortable" climate in British Columbia. Some variations occur throughout the region and, therefore, the following table presents climatic normals reported at Victoria, Saanichton, and Salt Spring Island.

CLIMATIC NORMALS

(from Canada Department of Transport, Meteorological Branch)

	Victoria 228' asl	Saanichton 200' asl	Salt Spring Island 36' asl
Hours with bright sunshine	2,216	2,064	--
Earliest, last spring frost	--	--	Jan. 26
Latest, last spring frost	April 8	May 10	May 10
Earliest, first fall frost	Oct. 29	Oct. 23	Sept. 23
Latest, first fall frost	--	Dec. 28	Dec. 8
Longest frost free period	609	378	273
Shortest frost free period	227	184	145
Mean annual rainfall	26.26"	31.56"	38.25"
Mean snowfall	11.5"	13.9"	25.9"
Mean total precipitation	27.41"	32.95"	40.84"
Number of days with measurable rain	138	141	133
Number of days with measurable snow	10	7	11
No. of days with meas. precipitation	143	145	140
Maximum precipitation in 24 hours	3.19"	3.24"	3.67"
Mean daily temperature (annual)	50.2 ^o	49.4 ^o	49.3 ^o
Mean daily temperature (July)	60.1 ^o	61.9 ^o	62.3 ^o
Mean daily temperature (January)	39.4 ^o	37.5 ^o	36.5 ^o
Maximum temperature	95 ^o	94 ^o	101 ^o
Minimum temperature	6 ^o	7 ^o	5 ^o

It is interesting to observe the climatic variations throughout the region although the most significant differences will occur between the average for the region and normals for other parts of the province. Regional variations are noted as follows.

Victoria enjoys nearly 200 hours more sunshine during the year than

other areas within the region. It is not uncommon for Victoria to experience a full 360 days with no frost while Saanichton and the Salt Spring Islands can experience frost in May and as early as October. Usually, however, the frost free period in Saanichton and Salt Spring Island extends to December. On the average the threat of frost is more common on Salt Spring Island than it is at Saanichton but the longest frost free period of 273 days indicates that the danger is not significant. The 26 inches of rainfall at Victoria increase to 31 inches at Saanichton and to 38 inches on Salt Spring Island. The chance of snowfall is greater on Salt Spring Island but the number of days with measurable rain does not vary significantly between Victoria and Saanichton and the Island. The mean daily annual temperature is only 1 degree higher at Victoria while the average temperature in July is 1 degree higher at Saanichton and Salt Spring Island. January temperatures tend to be 3 degrees higher at Victoria. Although minimum temperatures do not vary significantly between the three stations, maximum temperatures could exceed 100 degrees Fahrenheit on Salt Spring Island while they have never exceeded 95 degrees at Victoria and Saanichton.

From an agricultural and recreational viewpoint the differences between the three stations are not too significant. Victoria enjoys more sunshine and more moderate conditions while the other two stations received a little more rain, and slightly higher temperatures in the summer time.

Compared to other parts of the province the average normal for the Capital region varies significantly. Victoria with its 2,216 hours of sunshine exceeds all other regions of the province. The frost free period is much longer and summer temperatures are not as extreme as the Okanagan Valley. Compared to other coastal areas, the Capital region enjoyed similar moderate temperatures but without the high rainfall. The threat of frost is also less.

Finally, the Capital region, both from a recreational and agricultural viewpoint, appears to enjoy the best climatic characteristics of all parts of the province without inheriting the unpleasant or extreme characteristics. The Capital region is indeed a "comfortable" place to live.

HUMAN RESOURCESPOPULATION (1966 Census)

City - Victoria	57,453
Districts	
Central Saanich	3,640
Esquimalt	13,180
North Saanich	2,891
Oak Bay	18,123
Saanich	58,845
Town - Sydney	3,165
Electorial Districts	
Colwood	6,370
Langford	7,084
Metchosin	1,114
Sooke	2,953
View Royal	3,500
Salt Spring Island	2,240
Outer Gult Islands	<u>808</u>
Total	181,366

GROWTH

The following population estimates from 1971 to 2001 were derived by the Capital Regional District planners after considering such growth factors as past trends, birth and death statistics, immigration to the region, building permits issued, density of existing developments in specific areas and the amount of land available for development by areas.

The estimated 1971 population for the entire region is 208,860 representing a 3% annual increase over the 1966 Census figure. The annual increase to 1981 is estimated at 2.5%, from 1981 to 1991, at 1.9% and from 1991 to 2001, 2.4%. Thus, the rate of growth in the future can be expected to decline slightly from the rate established between 1966 and 1971.

An examination of the annual growth rate by area offers some indica-

CAPITAL REGIONAL DISTRICT - POPULATION ESTIMATES, 1971 - 2001*

	1971	Annual Growth %	1981	Annual Growth %	1991	Annual Growth %	2001
Victoria	65,300	1.2	73,000	0.8	79,000	0.4	82,100
Saanich	67,000	3.3	89,000	2.2	109,000	3.8	150,000
Oak Bay	19,300	1.7	22,500	0.9	24,500	1.0	27,000
Esquimalt	14,400	1.6	16,500	1.2	18,500	1.3	21,000
Central Saanich	4,900	3.9	6,800	4.4	9,800	4.3	14,000
North Saanich	3,600	3.9	5,000	3.9	6,950	2.9	9,000
Sidney	4,900	3.0	6,350	3.0	8,250	3.3	11,000
Langford, Colwood, View Royal Metchosin	<u>21,440</u>	3.7	<u>29,340</u>	2.8	<u>37,450</u>	3.0	<u>48,550</u>
Metropolitan Victoria	200,840	2.4	248,490	1.8	293,450	2.3	362,650
Sooke Electoral Area	4,290	3.6	5,830	3.6	7,930	2.6	10,000
Salt Spring El. Area	2,690	3.4	3,600	3.3	4,800	3.2	6,350
Outer Gulf Is. El. Area	<u>1,040</u>	2.5	<u>1,200</u>	2.5	<u>1,500</u>	2.7	<u>1,900</u>
Capital Regional District	208,860	2.5	259,120	1.9	307,680	2.4	380,900

* as of June of each year

Source: Capital Regional District, Victoria

tion of where the most significant growth will occur. It is predicted that Central Saanich will accommodate most of the urban growth in the future. Its annual growth rate for the next 30 years will range between 2.9% and 4.3%, the highest in the region. Saanich, North Saanich, Sydney, Sooke and Salt Spring Island are not far behind Central Saanich, with an annual growth rate approaching 3.5% over the next 30 years. The outer Gulf Islands, and Langford, Colwood, View Royal and Metchosin will grow at a rate ranging between 2.5% and 3.5%. The slowest growth rates are expected within the heavily populated urban areas of Victoria City, Oak Bay and Esquimalt. Because of the higher percentage of older people within these areas the birth rate will be less and further there is a shortage of land available for residential development. The annual growth rate of these three centres will range between a low of .4% between 1991 and the year 2001 for Victoria to 1.7% between 1971 and 1981 at Oak Bay. This is much below the provincial average.

POPULATION CHARACTERISTICS

The table on the following page shows population by age and sex according to the 1966 Census. The most startling figure on this table is the percentage of the population in the 65 plus age class. Sooke, at 11%, is followed by metropolitan Victoria at 15%, Salt Spring Island at 23% and the outer Gulf Islands at 27%. The significance of these figures can only be judged by a comparison with similar figures in other areas of the province.

Cranbrook	6.8%	Vancouver	13.5%
Nelson	9.7%	Coquitlam	6.1%
Trail	5.5%	North Vancouver	6.3%
Penticton	12.5%	Powell River	6.3%
Golden	3.4%	Prince Rupert	4.0%
Salmon Arm	10.1%	Terrace	4.4%
Vernon	11.0%	Vanderhoof	4.4%
Kelowna	13.3%	Prince George	2.7%
Kamloops	5.3%	Peace River North	2.9%
Williams Lake	3.0%	Nanaimo	9.2%
Merritt	3.9%	Summerland	14.5%
Chilliwack	10.5%	Kitimat	0.8%
		Fort Nelson	1.7%

CAPITAL REGIONAL DISTRICT -- POPULATION BY AGE AND SEX - 1966

		Total	0-14	%	15-44	%	45-64	%	65+	%
Metropolitan	T	173,455	47,178	27	64,085	37	35,947	21	26,245	15
Victoria	M	84,187	24,091		32,125		16,464		11,507	
	F	89,268	23,087		31,960		19,483		14,738	
Sooke	T	3,478	1,100	32	1,268	36	743	21	367	11
Electoral Area	M	1,770	539		660		372		199	
	F	1,708	561		608		371		168	
Salt Spring	T	2,240	493	22	565	26	654	29	528	23
Electoral Area	M	1,085	224		268		288		305	
	F	1,115	269		297		366		223	
Outer Gulf	T	1,022	169	17	232	23	343	34	278	27
Islands	M	527	91		116		166		154	
Electoral Area	F	495	78		116		177		124	

Sources: Capital Region Planning Board of B.C., Social Characteristics, 1966,

Victoria, B.C., 1968

Dominion Bureau of Statistics - 1966 Statistics

Sooke at 11% is surpassed only by some Okanagan communities which range between 11% and 14%. Metropolitan Victoria at 15% exceeds all other regions of the province but Salt Spring Island and the outer Gulf Islands at 23% and 27% respectively is indeed outstanding. Thus, the effects of a moderate comfortable climate is illustrated.

From a land use point of view, it is evident that urban development designed to please the retirement class would have a good chance to succeed.

The sex distribution is approximately 50% of each, similar to the provincial average. With such a large percentage of the population in the 65 year plus group it is natural that the percent of the population in the 0 to 14 year age class will be much less than the provincial average. It is interesting to observe how this particular age class distribution affects incomes.

INCOMES

The following table compares income sources for Victoria with the British Columbia average.

SOURCES OF INCOME IN METROPOLITAN VICTORIA AND BRITISH COLUMBIA, 1966

	Victoria	% of Total B.C.
Wages and Salaries	75.2	84.3
Interest and Dividends	10.3	5.3
Pensions	6.4	2.5
Business and Professional Income	6.3	5.9
Other Income	1.8	2.0

Source: Economic Survey of Metropolitan Victoria

With such a high percentage of the population in the 65 plus age group it can be expected that income derived from interest and dividends and pensions would be much higher in Victoria than in the remainder of the province. The total for Victoria is 16.7% while that of British

Columbia is only 7.8%. Income from investments alone is much greater in Victoria than in any other centre across Canada.

The average income from all sources, for the Victoria population, was \$5,721 per year according to the 1968 Income Tax Returns. In relation to the rest of Canada Victoria ranked 13th out of the 19 main metropolitan areas in Canada.

LABOUR FORCE

The following table shows the labour force estimates within the region for 1961 to 1971 and projected to 1981. The proportion of labour force to total population in the past has been similar to that of the remainder of the province. The Gulf Islands, however, with its extremely high percentage of people 65 years and older contains a low number of people in the labour force compared to total population but this does not significantly affect the regional average. It could be concluded, therefore, that the region possesses a healthy economic environment for those industries heavily dependent upon labour, other factors being equal.

CAPITAL REGIONAL DISTRICT - LABOUR FORCE ESTIMATES

	1961*	1966	1971	1981
Metropolitan Victoria	44,450	64,200	78,000	99,300
Sooke Electoral Area	851	1,050	1,450	2,090
Gulf Islands	<u>883</u>	<u>950</u>	<u>1,100</u>	<u>1,530</u>
CAPITAL REGIONAL DISTRICT	57,184	66,200	80,550	102,920

* Dominion Bureau of Statistics, 1961 Census

Source: Capital Regional District Planning Department

It is interesting to note where the people work. The following table classifies the labour force by industry. The proportion of the population working in public administration and defense is much higher than other regions. Victoria, being the seat of Provincial Government, headquarters for several Federal Government Departments and with the military well represented by the Esquimalt Naval Base, should contain more public

administrators and service men than other areas.

LABOUR FORCE BY INDUSTRY IN METROPOLITAN VICTORIA

1966

Industry	Number of Employees
Community, Business and Personal Services	15,556
Public Administration and Defence	14,889
Trade	9,998
Manufacturing	6,361
Transportation, Communications and Other Utilities	4,504
Construction	2,943
Finance, Insurance and Real Estate	2,404
Primary	2,147
Other	1,840
TOTAL	60,642

Source: Department of Community Development.

NATURAL RESOURCESFORESTRY

Statistics, measuring the impact of the forest industry to the economy of the region, are ten years old and may not represent the current situation. Several recent economic reports have been compiled by the Capital Regional District but the topic of forestry was treated lightly, providing only general descriptions of the forest lands and the industries. Although the forest products industry is the largest employer of all the manufacturing industries, its impact to the total economy has probably been overlooked in view of the large percentage of the labour force employed in other sectors. Only 11% of the labour force is employed in manufacturing with 30% of the manufacturing work force employed by the forest industries. Therefore, only 2-4% of the total working force is employed by the forest industry. Hence, it is easy to neglect this industry in regional economic studies. With over 50% of the labour force employed in the service industries, public administration and defense, these areas of concern become more important. However, the forest products industries are basic industries and, therefore, their input to the economy is significant and it is unfortunate that current statistics have not been compiled which would assist in more accurately defining the industry. The lack of information becomes even more critical when one considers the attention that other single users are presently giving to forest land. Recreationists and environmentalists are claiming greater land use priorities in the region's forests without an accurate assessment of benefits opposed to losses.

The most recent forest inventory of the region was completed in 1958. In the 13 year interval the inventory has likely changed significantly and the changes have not been accurately recorded. The western sector contains several timber leases within Tree Farm Licences No. 22 and 25 held by B.C. Forest Products and Rayonier Canada (B.C.) Ltd. The remaining portion of the Regional District is nearly 100% privately owned and, therefore, annual harvest has been unregulated. For this reason, it has not been in the best public interest for the Provincial Forest Service to spend public funds on a reassessment of the inventory.

However, the 1958 inventory shows the following breakdown of forest cover classes within the region. The western sector is the heavy forested area while the remaining eastern portion is heavily urbanized and supports fairly extensive agricultural development. Therefore, the forest resources in this eastern sector are much less than that of the western sector.

Class	Acreage	
	West Sector	East Sector
Mature Timber	212,090	1,384
Immature Timber	95,466	15,039
Not Satisfactorily Stocked	32,939	2,496
Non Commercial Stands	14,618	2,169
Non Forest	82,681	37,158

Since 1958 it can be assumed that the acreage of mature timber has decreased and the acreage of non forest lands have probably increased through urban expansion. As the acreage of mature timber decreases we hope that the acreage of immature timber increases rather than the area not satisfactorily restocked.

The region enjoys fairly high forest sites and, therefore, the Tree Farm holders have been planting the N.S.R. areas within their holdings. It is likely, therefore, that the total N.S.R. acreage has been decreased.

The 1961 study reports that logging and sawmilling are the most important economic activities in the western sector providing employment for 550 men. The total annual payroll of the logging industry alone was nearly 1.7 million dollars. The 1960 cut was over 30,000 M.c.f. with Douglas Fir being the main species. Nine sawmills and one shake mill operated during 1960 producing over 16,000 M.b.m. and employing nearly 100 men. Several sawmills have changed ownership since 1960; some have been dismantled and some have been modernized.

Logging is of little importance in the eastern sector but the Victoria area ranks third in place on Vancouver Island as a sawmilling centre. During 1960 12 sawmills operated in the area producing over 166,250 M.b.m. and employing 785 men. In addition to the sawmills there were two shingle mills and two plywood plants employing an additional

600 men. Total forest industry payroll at that time was estimated to be over \$6.5 million.

Today, the largest plant in Victoria is the British Columbia Forest Products Ltd. mill which produces 500 M.f.b.m. per shift plus 115 M.M. square feet of plywood on a 3/8" basis. In 1970 Sooke Forest Products Ltd. installed a new planer, trimmer, sorter and packaging machine which operates under a computerized selective memory system. The total cost of installation was \$1,200,000. Also in 1970 it was estimated that the logging industry in the western sector employed 500-600 persons producing over 40 million cubic feet with an approximate log value of \$15 million. The total value of forest products manufactured in Victoria in 1966 was \$120 million.

Finally, in terms of employment and personal income the forest industry plays a relatively small part in the total economy of the region. However, it is a basic and stable industry involving large capital investment and it will continue to form an important part of the manufacturing sector in the future. It is only because of the large percentage of service industries and public employees that the forest industry appears to assume insignificant proportions.

From a land use point of view many of the private lands within the region are located on good forest growing sites and are supporting a thrifty stand of immature trees. The market for private logs is good and, therefore, the private land owner can enjoy significant incomes through the harvest of his forest crop until a higher use becomes evident. The high growing sites give the forest land owner an opportunity to employ silvicultural practices to improve both the quantity and quality of his crop. Tree farming is commonly accepted within the region as a profitable form of land management.

MINING

Although history reports a flurry in gold mining on Goldstream Creek the region has experienced no major mining activities. Explorations have uncovered iron in the San Juan Valley and showings of copper have been observed at Beecher Bay, East Sooke and Jordan River. It is also reported that minor amounts of gold have been found at the head waters of Koksilah,

Jordan, Sooke and San Juan Rivers. De Maniel Creek, a tributary of Sooke River, has produced bauxite showings while talc of commercial grade has been found on Wolfe Creek. Coal exists here and there throughout the entire region.

Exploration activity within the region is summarized in the Annual Report of the Provincial Department of Mines. Sunloch and Gabbro copper deposits are located one mile north of the mouth of Jordan River. The company is exploring 51 contiguous claims. Five men are employed maintaining the plant and other equipment.

The Kirby property located 10 miles from Sooke contains 32 claims which are presently being analyzed. The Otter claims located 2 miles west of Sooke are also being analyzed. Sooke copper contains 100 claims on Sooke Peninsula. Geological mapping and drilling is presently in progress. The TZZ claims also on the Sooke Peninsula are being surveyed by magnetometer.

All properties are producing good copper showings. The chances of developing a producing mine will depend on world market conditions and the extent of the deposits. Activity is fairly brisk within a relatively confined area and some authorities believe that a "producer" will eventually emerge.

Extensive areas of claims have been staked in the vicinity of Jordan River, Diversion Reservoir, Sooke River and south of Sooke Basin. The Indian Reserves at Beecher Bay and Sooke lie adjacent to an area which is heavily staked.

AGRICULTURE

Fort Victoria was established by James Douglas in 1843. Better harbours existed at Sooke, Pedder Bay and Esquimalt but Victoria was selected because of the abundance of good farm land bordering the harbour. It was important that the fort should become self sufficient. The agricultural segment of the early economy expanded rapidly to provide food for the provisioning of American whalers, Royal Navy ships and the Russian fur trading forts further north. As a result of this demand for agricultural products, the Hudsons Bay Company initiated an energetic colonization program in 1858 and the colony grew in all aspects. Farm acreage expanded until the early part of the 20th century when some farm land was lost to urban encroachment. The acreage of farm land has continued to decline as the population of Victoria and surrounding municipalities have grown. Intensive use of the remaining farm land along with better varieties of crops have enabled the available land to provide much of the food requirements of the area.

Approximately 9,000 acres of land are classified as agricultural in the Capital Region. Agricultural production is focused on the local market, although improved ferry transportation off the Island has brought about minor changes in production. The Saanich Peninsula is the main area of production supplying the Victoria area with farm products for many years. Victoria's rapid growth since 1945 and the ensuing urban infringement on agricultural land has brought about a rapid change to an intensive type of agriculture.

The soils in the area are composed of a full range of soil classifications from clays to coarse textured sandy loams with considerable variations in soil fertility. A mild climate gives considerable advantage to farming, and extended hours of sunshine (2,200 per year) compensates for the low summer temperatures which reach a mean daily maximum of 68⁰F and a mean daily minimum of 52⁰F in July. The frost free period averages 282 days per year and temperatures in the winter are seldom below 20⁰F, although they have reached as low as 12⁰F. Precipitation averages 27 inches per annum although this is unevenly distributed throughout the

year with less than one inch in May and an average of barely two inches total in June, July and August. This has obvious implications on agricultural activity and tends to encourage irrigation on the more productive land leaving about one half the land, classified as agricultural, in rough pasture land.

There is a strong demand for fresh farm produce in the Victoria area, but the available productive acreage is small. Therefore, mixed farming has given way to dairy farming, which in turn, has been replaced by highly efficient poultry farms and horticultural crops.

Twelve dairy farms are still in production in the region while most of the milk required for the Greater Victoria market is produced in the Duncan to Courtenay areas. A small number of beef cattle, sheep and hogs are raised in the area and goats are popular although their numbers are not significant. Light horses for recreational purposes continue to be a significant user of the poorer classes of agricultural land. An expanding population has placed considerable emphasis on nursery crops for the beautification of homes and gardens. Also, due to climatic advantages, the area exports field grown cut flowers in the early spring.

Loganberries and strawberries, accounting for 150 acres each, are significant crops with most of the strawberries marketed as a fresh product in Victoria, and also in the Vancouver area, as they are the earliest strawberry crop in the province. Loganberries are sold on the fresh market and also to the local wineries. The Saanich Peninsula is the only area where loganberries can be grown successfully in B.C. and the demand for this crop is strong. Some grapes are grown but the acreage is not significant.

Apples occupy about 125 acres and the acreage is expected to increase while cherries are decreasing and are not expected to be grown as a commercial crop in a few years time. Holly production is decreasing with about 80% of the total B.C. crop produced in the region, valued at approximately \$43,500.

Poultry and egg production is significant in the area, with two poultry killing and eviscerating plants in operation. These plants draw some of their production from the northern part of the Island. One large egg grading station is in operation and a number of small operators sell direct to the consumer.

Truck farming accounts for about 744 acres in the region and includes potatoes, cabbage, carrots, onions, and several other crops. Green house production of tomatoes, cucumbers and flowers cover approximately 600,000 square feet of space, or about 14 acres, and much of this production includes two crops per year from the same green houses.

The following table gives an indication of production value in the Capital Region.

Farm Gate Value for Farm Products Marketed
Through Commercial Channels* in 1970

<u>Item</u>	<u>Value</u>
Dairy Products	\$ 700,000
Poultry Products	2,800,000
Livestock	200,000
Fur Farms	480,000
Vegetables	1,800,000
Berries	422,000
Tree Fruits	66,000
Flowers and Bulbs	1,280,000
Nursery Stock	360,000
Holly	43,000
Honey	<u>50,000</u>
Total	\$8,201,000

* This does not include products sold from produce stands on farm property for which no estimate is available.

The trends in agricultural production will depend to a large extent on the zoning bylaws which are promulgated in the area and what preference agriculture is given in these bylaws. Modern planning generally accepts the need for open space and green belts and if this approach is taken, agriculture will continue its trend of intensification, but the extensive type which uses rough pasture land could still exist in a limited way. If planning does not protect the land, only the more intensive forms of agriculture which are able to compete with urban development on the economic return basis will survive. As intensification of

agriculture takes place, less people will be employed in these activities although these individuals will become more highly skilled.

The demand for blackberries and loganberries by the wineries is good. This could be a profitable crop for Indian Reserves with suitable land and available water.

RECREATIONA. SAANICH, VICTORIA, SOOKE AREATOURISM

In 1963 it was estimated that tourism generated more than \$150 million within the British Columbia economy. At that time it was predicted that the total would double in the near future. In 1970 the total receipts reached \$473 million, a rise of 10% over 1969. It should be noted, however, that the 1970 estimate is based on a broader field of research conducted by the Dominion Bureau of Statistics. However, it is a safe assumption that the 1970 figure is at least twice that of the 1963 amount.

It has been estimated by the Greater Victoria Visitors and Convention Bureau that tourism contributed \$80 million to the economy of Vancouver Island alone in 1970. Acres Western Limited, in their study entitled, "Market Analysis and Economic Feasibility Downtown-Inner Harbour Renewal Scheme, Victoria, B.C., 1968" analyzes the impact of the tourist industry to the metropolitan Victoria area. The report states that in 1966 the annual visitor expenditures was \$9,550,000 while the estimated 1981 expenditure would be \$28,130,000. It is difficult to compare these figures to the \$80 million figure mentioned above because the study is confined to the metropolitan Victoria area only and undoubtedly is based on a narrower field of research. However, of considerable interest is the fact that the study showed that the volume of tourist expenditures is expected to double over a 15 year period from 1966 to 1981 within the metropolitan Victoria area. Looking at the figures in retrospect it is apparent that the estimate was conservative. Because it indicates an average annual increase of only 7% while the Provincial annual increase is closer to 10%.

The most recent study on tourism within the province was completed by the British Columbia Government in 1963. The study uncovered several interesting factors. Although the figures are now out of date and were not specific to the Victoria region, the following quotes from the text are worth repeating.

"Vancouver and Victoria enjoy a good deal of volume from short term city seeking visitors. They stay less than a week, spend at a far higher rate per day than the norm, and leave usually with the intention of coming back to see more of the province on another, longer visit."

"Vancouver Island was the most popular attraction in the province to Californians. This one day visitor spends \$38.10 per day on the average."

"Considering the tourist parties expenditure by region, Vancouver Island enjoyed by far the highest total, with an average more than double the average of all other regions. The lower mainland stood second, some distance back; the Okanagan was close behind with all other areas closely grouped again some distance back."

The 1963 study dealt with tourism throughout the entire province but regional information can be extracted. The study showed that the majority of people visiting Vancouver Island stayed two or three days. They were primarily interested in viewing the city, shopping, enjoying the scenery and examining the historical sites. The number of tourists interested in swimming, camping, fishing and boating was not too great. However, in view of the attractive sandy beaches, accessible marinas and boat launching sites and good fishing spots within the Nanaimo region, it is likely that the percentage of tourists enjoying these activities would be greater in the Nanaimo region than in the Victoria region.

A more recent study completed by the Capital Regional District pertains specifically to the Victoria region and lists the following recreational activities in order of prominence.

Walking for pleasure	Driving for pleasure
Bicycling for pleasure	Visiting the beach
Playing outdoor sports	Fishing
Boating	Picnicking
Sightseeing	Golfing
Attending outdoor sports	Horseback riding
Camping	Nature walks

It is emphasized that the above analysis deals with recreational habits of the local population and, therefore, the activities may vary somewhat from what a tourist might prefer. However, a large percentage of the tourist population are visiting friends and relatives and, therefore, it is likely that many tourists would join their hosts in these recreational pursuits.

The Victoria region is peculiar from the rest of the province in its recreational composition. Probably no other region within the province can claim walking, driving, and bicycling as prime recreational activities. However, the region is generously blessed with attractive parks, interesting historical monuments, attractive and unique flora, exciting seashore environments, extravagant residential neighbourhoods and a quaint downtown section with mini neighbourhoods closely resembling a piece of old England and frequented by characters out of a Dicken's novel. The Tudor style architecture with the outdoor tea gardens and several shops advertising English Bone China compliment the scene. The tourist can best enjoy these facilities on bicycle or on foot or by driving bumper to bumper along the scenic routes which have been marked for the convenience of the tourists.

These are the unique components of the Capital region's recreational assets. They are simple but they attract tourists from all directions and in increasing numbers each year. It is interesting to examine records compiled by the B.C. Ferry Authority to determine the origin of tourists. 16.3% of the 1,500,000 vehicles travelling to Vancouver Island in 1970 had out of province licences. During July and August this percentage increased to almost 30%. 46% of all out of province vehicles are Canadian with the remaining 54% being American. Over half of the Canadian vehicles are from Alberta followed in order of importance by Ontario, Saskatchewan and Manitoba. 80% of the U.S. traffic is from California and Washington. 78% of the out of town ferry traffic occurs during the months of June, July, August and September. The Canadian visitors spend more than the American because they stay longer, however, the visitor from southern California arrives more frequently, stays for a shorter period of time but spends much more money per day than visitors from other areas. The 1963 study on tourism states that the average expenditure per party, at \$81.50 for Vancouver Island, far exceeded that of all other regions

within the province. This is largely attributable to the fact that much of the recreation involved "browsing" through the shops.

Not all ferry traffic is tourist traffic. The ferry service is an important commercial link with the mainland used by several sectors of society. However, an examination of the increase in the use of British Columbia Coastal ferries during the past 10 years might very closely resemble the percentage increase in tourist traffic during this same period. The following table shows the volume of ferry use during the years 1962, 1965, 1970 and 1971.

<u>Year</u>	<u>Passengers</u>	<u>Vehicles</u>
March 31, 1962	2,040,000	697,000
March 31, 1965	3,300,000	1,885,000
March 31, 1970	5,671,000	2,102,000
March 31, 1971	5,963,511	2,228,412

If we accept the concept that the increase in tourist traffic is directly proportional to the increase of all ferry traffic, the above table shows that the volume of tourism on Vancouver Island has more than tripled during the past ten years.

Another interesting statistical analysis prepared by the B.C. Ferry Authority shows the number of mobile homes, campers and trailers using the ferries from each terminal during each month of the year for 1969 and 1970. The figures are not too reliable for the purpose of measuring tourist traffic on the Island because some of the counts will include inhabitants who are travelling to the interior for their holidays. Further, the traveller might enter the Island at Swartz Bay terminal and leave at Departure Bay terminal and thus be counted twice. However, certain interesting trends are indicated by the figures.

MOBILE HOMES, CAMPERS AND TRAILERS USING B.C. FERRIES

<u>Terminals</u>	<u>1969</u>	<u>1970</u>	<u>% Increase</u>
Tsawwassen	13,841	14,926	8%
Horseshoe Bay	14,155	18,164	28%
Swartz Bay	17,384	21,666	30%
Departure Bay	20,912	24,935	20%
Total	66,292	79,691	20%

The number of recreational vehicles using the ferries increased by 13,399 or 20% from 1969 to 1970. This figure does not include those tourists who camp in a tent. The number of units using the Tsawwassen terminal increased by 8% while the number using the Swartz Bay terminal increased by 30%. From this we might conclude that most travellers who travel from Tsawwassen to Swartz Bay leave the island by Departure Bay while those who leave the mainland from Horseshoe Bay generally return via Departure Bay. In other words, most tourists travel from Horseshoe Bay to Departure Bay then down to Victoria and back to Departure Bay to leave the Island. Or, the figures might indicate that the destination of most campers who use the Horseshoe Bay and Departure Bay terminal is some point north of Nanaimo and, therefore, their return journey is also via Departure Bay. At any rate, it is evident that the Nanaimo region likely enjoys a greater exposure to camper traffic than the Victoria region does. Further, a total increase of 20% in one year is indeed startling. If the trend is to continue a brisk expansion program is necessary to meet the demands for camping space.

On examining the ferry use by recreational vehicles for various months the following trends are of interest.

1. The number of units using the Tsawwassen terminal decreased in 1970 during the month of April, May, June and July but increased substantially during the remaining months.

2. The use of all other terminals increased at a rate varying between 20% and 60% during the summer months; increased moderately during the fall months but increased at rates often exceeding 100% during the months of January, February and March.

From this it might be concluded that travellers prefer the short highway drive to Horseshoe Bay over the longer trip to Tsawwassen. The increase in use during the first four months of the year might indicate that several inhabitants of the Island travelled to the southern states during the winter and further it might indicate that camper use by tourists is experienced all months of the year on Vancouver Island and the trend is increasing. The latter is particularly true in the vicinity of Victoria where several camps are kept open the full year.

<u>Type of Accommodation</u>	<u>No. of Establishments</u>	<u>No. of Units</u>
Motel and lodges	92	1,937
Hotels	22	1,645
Camping and Trailer Parks	13	671

Included in the 22 hotels is the 250 room Empress Hotel which is recognized throughout the world as a "fine old hotel". Since much of the recreational activity is centred around the downtown core, it is natural that the region should contain more hotels than most regions throughout the province. Many of the hotels are equipped with banquet and convention facilities.

92 motels providing 1,937 units is indeed a startling number but it is surprising to note that the amount of motel accommodation does not significantly exceed that of the Nanaimo region. The Nanaimo region contains 78 motels and lodges with 1,243 units. Most of the motel development is centred around Greater Victoria in well defined motel communities. The Gorge Road, for example, advertized "40 motels". In the Nanaimo region, on the other hand, motel communities are scattered throughout the district along the coastline.

It is not uncommon, during the tourist season, to observe mobile camping units parked at motels because of the lack of camping space. The Victoria region contains only 671 camping units compared to Nanaimo's 1,686. The Victoria region may be turning away a significant volume of tourist trade because of the lack of camping facilities. Included in the number of camping units are 189 units provided by the Provincial Government Parks Branch. The Parks Branch has compiled detailed records regarding the characteristics of campers since 1968 as shown in the following table.

PARK ATTENDANCEProvincial Parks Branch CampsitesWITHIN THE CAPITAL REGIONAL DISTRICT

Year	Number of Visitors			Camper Origin Percentage			Camper Accommodation Percentage			
	Day Use	Camper Nights	Total	B.C.	Can.	U.S.	Camp.	Tylr.	Tylr.	Tents

GOLDSTREAM

153 Camping Units, 46 Picnic Tables

1968	75,256	51,352	126,608	34.0	25.7	40.3	--	--	--	--
1969	118,660	58,372	177,032	40.3	22.5	37.2	17.1	17.2	15.4	50.3
1970	117,200	65,416	182,616	43.4	18.0	38.6	18.2	15.3	15.0	51.5

McDONALD

36 Camping Units

1968	--	9,492	9,492	33.4	32.7	33.9	--	--	--	--
1969	--	12,308	12,308	32.8	29.0	38.2	26.5	17.4	14.6	41.5
1970	--	13,908	13,908	35.3	27.5	37.2	24.3	20.4	14.4	40.9

Over the three year period the number of camper nights has increased 27% at Goldstream and 47% at McDonald with an average increase per year of 12%. If this rate of increased use is indicative of future trends, the over flow from Provincial Government Campsites will increase significantly and with only 482 private camping units available to absorb the overflow it is apparent that an even greater shortage of accommodation will develop in the future unless more units are constructed. The Provincial Parks Branch reports that there is a significant surge of campers to their campgrounds during the Easter weekend, the 24th of May weekend and Labor Day weekend. Mild climatic conditions allows enjoyable camping during these periods within the region while other areas within the province are not as fortunate. Thus, the camping season is extended significantly.

The percentage of visitors from British Columbia increased each year while the percentage from other parts of Canada decreased. The percentage from the United States decreased at the Goldstream campsite and increased at the McDonald campsite. These trends seem to vary throughout the province. The percentage of B.C. visitors is much greater in the Nanaimo region while the percentage of visitors from other parts of Canada is much less. Further on a percentage basis, the Victoria campsites attract twice as many U.S. visitors as the Nanaimo campsites. This might indicate that significant numbers of American campers enter the Island by way of the Port Angeles ferry, camp a few nights in the Victoria region and then return to the mainland. Or, alternatively, it might simply indicate that B.C. campers are not attracted to the type of recreation offered by Victoria to the same extent as campers from other Canadian centres and the United States.

Campsites can be profitable. However, as with any business catering to the tourist industry, good management and careful planning of the original design are important factors controlling success. Further, the expense involved in satisfying the Provincial Department of Health regulations often limits the viability of the campsite operation. Sewage disposal systems other than septic tanks are expensive and might seriously jeopardize the economics of a venture. A campsite designed to meet the minimum size requirements of 900 square feet per unit is crowded and offers no privacy whatsoever. If a campsite developer wishes to reduce the cost of development by increasing the use density he should do so with caution. Some authorities have suggested that a percentage of the campers enjoy a crowded Coney Island type environment and, therefore, the most profitable design would include a high density use area, at approximately 20-25 campsites per acre with all service hookups plus a low density area, providing more privacy at 6-8 campsites per acre with no hookups. Good management, effective advertising and the availability of a prime recreational focal point such as a good beach are imperative to the successful operation of any campsite.

In view of the apparent shortage of campsite space within the region the potential for successful development appears good. However, transportation routes throughout the region are relatively complicated and, therefore, the importance of adequate advertising and signposting can not

be over emphasized. A campsite located in a relatively isolated area will undoubtedly possess appealing characteristics but if it is difficult for the stranger to find, it may require a few years of operation before it becomes known and successful. Alternatively, in view of the concentration of tourist attractions within and adjacent to Greater Victoria it is conceivable that a dense development on relatively high value land close to the urban centre might succeed. The visitor would simply be searching for a convenient spot to park his unit which is not too far from the urban attractions. Such a campsite would command a much higher rental than more rural campsites. Zoning regulations may prohibit such use.

Finally, from a land use point of view, it is evident that the demand for tourist facilities is increasing each year and will likely continue to increase in the future. The reputation of the region as an unique recreational area is gaining international prominence. It should be noted that an additional influx of tourists arrives from the United States by water, navigating their own craft leisurely through the Gulf Islands. The extent to which this mode of transportation is influencing tourism throughout the region has not been accurately measured recently but the Provincial Government's recent activity in constructing marina campsites on the islands was prompted by a strong demand for such facilities.

The following table is part of a study completed in 1968. At that time the researcher had 1963 and 1966 figures to work from and made predictions for 1981. Today, in 1971, we are able to examine the figures in retrospect and it appears that the prediction may have been conservative. However, the table shows some interesting trends. In 1966 Victoria captured 19% of all tourist visitors to B.C. In 1981 it is expected that this percentage will decline slightly to 18.5%. It is interesting to note that only 45% of the Victoria tourists arrive during the summer season. This figure is expected to increase to 59% in 1981. Probably no other recreational area within the province supports such a large percentage of winter visitors. In 1981 the total annual visitor expenditure is expected to be three times what it was in 1966 or \$28,130,000. Probably no other industry within the region is expected to experience growth equivalent to the tourist industry.

ESTIMATED VOLUME AND EXPENDITURES OF VISITORS TO METROPOLITAN VICTORIA

1963 - 1981 (1)

('000)

	1963	1966	1981	% Change 1966-81
Total arrivals to (thousands) Vancouver Island (2)	1,120	2,184	n.a.	---
Annual tourist visitors to B.C. (thousands) (3)	--	3,900	8,100	108%
Tourist Visitors to metro- politan Victoria (thousands)	609	735	1,497	104%
Summer season tourist visitors to Victoria (thousands) (4)	274	331	895	170%
Percent summer season visitors	45	45	59	---
Average per diem visitor expenditure	n.a.	\$13.00	\$18.79	45%
Total annual visitor expenditure	n.a.	\$9,550,000	\$28,130,000	194%
- Food		2.43	7.15	
- Lodging		1.84	5.41	
- Retail		1.61	4.74	
- Transportation		2.57	7.56	
- Entertainment/Services		1.10	3.27	
		<u>9.55</u>	<u>28.13</u>	

- Notes: (1) A visitor is defined to be a person who travels for 24 hours or more in a region other than that in which he resides.
 (2) Arrivals by ferry and air transportation as estimated by Victoria Visitors' Bureau.
 (3) Visitors arriving from out-of-province origins
 (4) 92-day season -- June, July, August -- estimated at an increasing rate of 45% to 60% of annual visitors
 n.a. -- not available

Sources: Victoria Visitors' Bureau. Acres Western Limited

Table reproduced from Acres Western Limited. Market Analysis and Economic Feasibility Downtown - Inner Harbour Renewal Scheme.
 Victoria, B.C., 1968

An economic survey completed by the Planning Department of the City of Victoria in 1969 states in part,

"The major problems of the tourist sector in the future will be the seasonal factor and the ability of the existing transportation facilities to provide adequate service during the peak summer periods."

Evidently, the economic study anticipates that a large expansion of tourist facilities will be necessary to accommodate the increased tourist trade during the peak summer period and winter occupancy will be low. However, Victoria with its mild winter temperatures attracts many winter vacationers and people who make a habit of migrating to warmer climates for the winter and, therefore, the decline of business during the winter months will certainly not be as severe as what is experienced in other regions. The ability of existing transportation facilities to cope with the anticipated expansion of the tourist industry could certainly become a critical factor. Congestion at the ferry wharf and on road systems throughout the region will undoubtedly occur unless preventive action is taken.

SPORTS FISHING

The 1963 survey on tourism points out that 73% of the parties interviewed came to Vancouver Island simply to see the cities while only 12% arrived to enjoy the sports fishing. The socio-economic report for the Nanaimo region (Land Use Services, 1971) suggests that these proportions are certainly not representative of that region but might be representative of the Victoria region. The report emphasized that sports fishing contributes significantly to the recreation industry in the Nanaimo area and, therefore, a comparison of catch statistics between the Victoria and Nanaimo regions would be of interest.

Period	Nanaimo Total Catch	Victoria Region Catch		
		Saanich Penin.	Victoria-Sooke	Total
1967	22,450	34,125	55,875	90,000
1968	30,600	33,550	39,980	73,530
1969	28,575	33,350	69,825	103,175
1970	<u>31,650</u>	42,875	23,325	<u>66,200</u>
	113,275			332,905

Source: Salmon Sports Fishing Catch, Statistics for Tidal Waters of British Columbia - 1970, Department of Fisheries and Forests.

During the past four years three times as many sports fish were caught in tidal waters adjacent to the Victoria region than in waters adjacent to the Nanaimo region. There are no statistics available distinguishing between tourist and non tourist fishermen. In view of the larger population within the Victoria region it is conceivable that many fishermen are non tourist and, therefore, the impact of the sports fishing industry to the total recreation sector of the Victoria region may not differ from the Nanaimo region as drastically as the comparison would indicate. However, the figure would certainly indicate that sports fishing is just as important to tourism within the Victoria area as it is within the Nanaimo area. Therefore, it is likely that the number of tourists that travel to the region to fish might exceed the 12% figure indicated in the 1963 survey. The following table analyzes catch figures for various months of the year.

SALMON SPORTS CATCH, FISHING EFFORT AND SUCCESS
by Month, in the SAANICH INLET, VICTORIA, SOOKE AREA, 1970

Period	Total Catch	Boat Days	Average Catch/ Boat Day
January to April	18,525	11,675	1.6
May	4,925	4,900	1.0
June	5,425	5,100	1.1
July	4,575	9,425	0.5
August	5,200	9,125	0.6
September	5,900	7,300	0.8
October	10,775	7,300	1.5
November	4,375	2,575	1.7
December	5,625	2,800	2.0

Source: Salmon Sports Fishing Catch Statistics for Tidal Waters of British Columbia, 1970, Department of Fisheries and Forests.

The above table shows that July and August are heavy use months. However, the early spring period and early winter period produces better catches. Thus, winter salmon fishing could contribute significantly to the success of operating a seaside tourist resort, catering to fishermen.

The impact of tidal water sports fishing on the tourist industry on Vancouver Island was analyzed in a 1969 survey completed by the Federal Department of Fisheries and Forests entitled, "Participation by United States Residents in West Coast Tidal Sports Fisheries." The survey revealed that,

"During any single day of the four months, May, June, July and August, of 1969, the potential number of U.S. self contained units visiting Canada primarily to participate in the west coast tidal fishery is 400. Of the 400 approximately 320 would be located on Vancouver Island and 80 on the mainland. It was found on the average these units contained two to three persons. This means that there were on the average approximately 920 American visitors in British Columbia primarily to participate in the tidal fishery each night during the summer of 1969."

The survey analyzes in detail the characteristics of the fisherman, his likes and his dislikes, his length of stay and the amount of money he spends. It studies those Americans who enter Canada by boat as well as those who travel in camping units.

From a land use point of view it is concluded that tidal water sports fishing is a very important segment of tourism within the region and, therefore, accommodation establishments which cater to fishermen should enjoy a much greater chance of success. However, it should be noted that in order to attract family groups, facilities to encourage beach activities and swimming are an asset. Therefore, developments most likely to succeed would be located on the seashore, possess an attractive beach and provide a nominal number of cabins, at least 100 camping spaces with some service hookups, a boat ramp, moorage facilities, boat rentals and a marine supply outlet.

Fresh water fishing is of much lesser importance to tourism. The trout fisherman would likely be attracted to other regions of the

province. However, inhabitants of the region enjoy fishing the potholes in the Sooke River and undoubtedly their guests join them in the sport. Of the 41,610 steelhead landed in B.C. in 1968, 40% or 16,509 were caught on Vancouver Island. However, only 618 were caught in the San Juan River, the main steelhead stream in the region. It is, therefore, evident that avid fishermen would not journey to the Capital region specifically to catch trout.

SUMMER HOMESITES

Seashore summer homesite colonies are not common within the region. This is due to two main factors.

1. Seashore summer cabin developments are generally associated with such recreational pursuits as swimming, boating and beach activities. Sandy beaches are relatively scarce within the region and most existing beaches are polluted and not safe for swimming. Family groups, therefore, in pursuit of a summer homesite on water would not be attracted to the region's seashore.

2. Land suitable for residential development and fronting on the seashore is generally high priced beyond the means of most summer homesite users and, therefore, such land is usually occupied by permanent residences and those who prefer to locate on the seashore simply to enjoy that particular type of environment. Beach activity is generally confined to launching and docking a fishing boat. Seashore residential developments for retirement people are much more common than similar developments for summer homesite purposes. Some authorities class retirement subdivisions as part of the recreational spectrum but for the purpose of this report they are considered as part of the urban development sector.

B. GULF ISLANDS

The Gulf Islands are treated separately in this study because they possess characteristics which differ significantly from the main island. They are more attached to Vancouver Island in an economic sense than they

are to the mainland because ferry transportation to the islands is from the main Island. However, the islands possess a quality of isolation and remoteness which is generally not experienced on the main Island and they are exposed to a relatively new breed of tourist. The yachtsman, fisherman and family groups who tour the islands in their runabouts make frequent calls at various points on the Gulf Islands as they leisurely make their way through the protected waters in their small crafts. It is not uncommon for family groups or individuals to tour the islands in their private boats either on weekend excursions or as part of their annual holiday.

The Provincial Parks Branch have recognized the need to accommodate this type of tourist and have constructed several campsites on the islands. Although the campgrounds are experiencing fairly heavy use, reports to date indicate that use has not been as intensive as what was anticipated. The Parks Branch feel that more attention should have been given to constructing picnic grounds or campsites with boat launching facilities on the main island to compliment the developments within the Gulf Islands. This would provide tourists on the main island the opportunity to visit the Gulf Island campsites in their small boats from their head camp on the main island. However, the marine park concept began only 14 years ago in 1957 with the development of Montague Harbour Provincial Marine Park on Galiano Island. Other campsites have been added to the system and it is anticipated that the growth of this type of recreation will soon put a strain on existing facilities. Existing parks within the Capital region include the following.

1. Princess Margaret Marine Park - undeveloped sandy beaches on Portland Island.
2. Beaumont Marine Park - providing camping, picnicking in Bedwell Harbour on South Pender Island.
3. Montague Harbour Marine Park - camping and picnicking on Galiano Island.
4. Sidney Spit Marine Park - camping and picnicking

Use statistics for three of the marine parks within the district are presented on the following tables.

PARK ATTENDANCEProvincial Parks Branch Marine CampsitesWithin the CAPITAL REGION

Year	Number of Visitors		
	Day Use	Night Campers	Total
<u>BEAUMONT MARINE PARK</u>			
1968	--	1,884	1,884
1969	--	2,000	2,000
1970	--	2,200	2,200
<u>MONTAGUE HARBOUR MARINE PARK</u>			
1968	--	17,092	17,092
1969	35,136	8,636	43,772
1970	30,756	9,932	40,688
<u>SIDNEY SPIT MARINE PARK</u>			
1968	--	2,544	2,544
1969	--	3,896	3,896
1970	7,956	1,742	9,700

The use of marine parks appears rather erratic according to the above statistics but the general trend has been towards a substantial increase in use. The following table shows further details for Montague Harbour Marine Park.

PARK ATTENDANCEMONTAGUE HARBOUR MARINE PARK

Year	Camper Origin Percent			Camper Accommodation Percent			
	B.C.	Canada	U.S.	Camper	Trailer	Tent	Tylr. Tents
1968	83.8	2.5	13.2	--	--	--	--
1969	88.9	3.0	8.1	11.1	12.4	9.9	66.6
1970	80.8	8.5	10.7	7.6	8.8	13.8	69.8

The percentage of British Columbia users is much higher in marine parks than in other Provincial Parks while users from other parts of Canada and the United States are much less. It is likely that if boat

launching parks were constructed on the main island to provide more direct access to the marine parks, the number of users from other parts of Canada and U.S. would be greater.

It is difficult for marine vessels to carry any camping shelter other than a tent. It is, therefore, natural that the percentage of tent users should be higher within the marine parks. Montague Harbour Marine Park is provided with road access and, therefore, some tourists arrive with campers and trailers.

From a land use point of view the marine campsite is interesting because the demand for such facilities will likely accelerate in the future. The Strait of Georgia and particularly the Gulf Islands offer some of the finest cruising waters in the world. Hundreds of smaller islands provide sheltered coves, sandy beaches, interesting fiords and protective waters for boating enthusiasts.

The summer population on the Gulf Islands very nearly equals the permanent population. Although the permanent population is showing very little growth the summer population has more than doubled during the past four years. The islands have indeed become a popular area for summer homesites. It has been estimated that over 7,500 acres have been subdivided into lots of two acres or less in size. From 1959 to 1968 3,144 lots were created by subdivision. It is reported that some subdivisions on the islands are larger than any subdivisions within the entire Capital region. One such development on North Pender Island could support approximately 5,000 people when fully developed. The planning study of the Gulf Islands prepared by the Capital Regional District in 1970 reports that 55% of all lots on Salt Spring Island have been built upon compared to 40% on the outer Gulf Islands. Over half of the lots built upon are for permanent residences with the remainder for seasonal residences. The report further points out that most of the new lot purchasers are from the Greater Vancouver area with only about 10% from the United States.

There is indeed a strong demand for recreational property on the Gulf Islands and it is likely that a subdivision for summer homesite purposes on Indian Reserves with favourable recreational characteristics would succeed. However, the demand will grow much stronger in the future because the Regional District have recently approved a subdivision bylaw restricting the size of subdivided lots to 10 acres. A lot shortage may develop before the restriction is lifted.

WATER

Approximately 15,000 acres or 12% of the total metropolitan land area are included within the Greater Victoria watershed boundaries. Although logging is permitted within the watershed it is carried out in accordance with a plan which is compatible with good watershed management.

The Greater Victoria Water District serves:

- City of Victoria
- Oak Bay District Municipality
- Central Saanich Water District
- Esquimalt District Municipality
- Saanich District Municipality

Although isolated areas occur throughout the region where water is not available, a very adequate source exists within the watershed and an additional untapped source lies within the San Juan River Basin. It is unlikely that a shortage would ever develop. However, the high cost of distributing water could create problems in certain areas which are not already served by a community water system.

Water supply is more critical on the Gulf Islands than it is on the main island. Salt Spring and North Pender Island contain a number of lakes providing a good source for domestic water. However, Mayne Island and several of the smaller islands do not contain lakes and water is often supplied from individual wells. It is reported that water from deep wells is generally of good quality but the possibility of intrusion by salt water is always present. Water supply will be the main factor limiting development on some of the islands.

FISHERIES

The fishing fleet based within the region has declined during the past ten years. In 1960 there were 550 vessels based in the Greater Victoria area with 181 based in the Sooke-Jordan River area. 220 men were employed in commercial fishing in the Sooke-Jordan River area at that time along with 725 in the Greater Victoria area.

In 1970 430 fish boats were based in the metropolitan Victoria area supporting 655 fishermen. There are no current statistics available for the Sooke-Jordan River area but it is expected that the number has declined significantly.

In 1969 there were 7,131 fishing vessels in British Columbia with Greater Vancouver and Prince Rupert being the main home ports. It, therefore, becomes evident that the Greater Victoria area supports only a small portion of the total industry on a provincial basis. The 1970 catch was valued at \$3.6 million while the comparable provincial figure is \$60 million with a wholesale or marketed value of \$120 million.

From a regional point of view, the percentage of the labour force employed as fishermen was 2.7% in the western sector and 0.3% in metro Victoria according to the Dominion Bureau of Statistics, 1961. The estimated gross income from farm products within the Regional District was \$8,600,000 in 1968 which exceeds the value of the 1970 fish catch by nearly three times. The average net fishing income, before tax, in the Victoria region is \$3,320, barely a living wage. Although this average exceeds that of Nanaimo it is far behind the Vancouver average at \$4,131.

There are no canneries within the region and, therefore, it is evident that the fishing industry contributes very little to the total economy of the region. The fisherman purchases supplied and supports his family within the region and probably repairs and stores his boat within the region. However, the product is sold and processed outside the region and the fisherman's income is not sufficient to significantly affect the regional economy one way or the other. It is a way of life for some people and the presence of fish boats in the harbour adds considerable esthetic appeal. It is not anticipated that the industry will grow and in fact it may decline slightly.

TRANSPORTATION

The effect of transportation routes on land use within the metropolitan area is an extremely complex subject which is continually being studied by planners. The Capital Region sponsored a transportation study in 1965 and today planners are still reviewing and redesigning in an effort to relieve the strain on traffic routes caused by increased volume particularly during the summer months. The widening of the north-south highway from Victoria to Swartz Bay ferry terminal is very nearly complete with construction still in progress here and there. A freeway into the heart of the downtown section has been proposed to relieve congestion. Planners find it is difficult to move traffic efficiently and quickly without conflicting with the quaint shopping mall atmosphere and the esthetics of some neighbourhoods. It is beyond the scope of this report to present a comprehensive analysis of such a complex planning problem. Many of the scenic tours around the peninsula are extremely attractive because the roads are winding and narrow. It is difficult to please the slow moving tourist and at the same time provide commercial traffic with quick direct routes. Present transportation facilities include the following.

FERRIES

The British Columbia Ferry Authority provides hourly sailings in the summer and one sailing every two hours between Swartz Bay and Tsawwassen. The Black Ball Line offers four sailings per day in the summer and two in the winter between Victoria and Port Angeles, Washington. The Washington State ferries make three trips in the summer and one in the winter between Sidney and Anacortes, Washington. Canadian Pacific Steamships make one trip daily between Victoria and Seattle in the summer only.

AIRLINES

Fifteen Air Canada flights depart daily from Victoria International Airport. Pacific Western Airlines provide direct connections from Victoria to Vancouver and Seattle. Smaller airlines provide 5 flights a day from downtown Victoria to downtown Vancouver.

RAILROADS

The Esquimalt and Nanaimo Railway (C.P.R.) provide passenger and freight service between Victoria and other points on Vancouver Island. The Canadian National Railway operates a freight service from Victoria to the mainland.

HARBOURS

Designed to handle both deep sea shipping and coastal traffic.

HIGHWAYS

Three major Provincial highways serve the metropolitan area. To the north, the main highway connects with the Swartz Bay ferry terminal; to the west, the communities of Sooke, Jordan River and Fort Renfrew are served. To the west and north, west of Saanich Inlet the Island Highway enters the region.

COMMERCIAL BUS LINES

Vancouver Island Coachlines (B.C. Hydro) offer eight return trips per day to downtown Vancouver.

COMMERCIAL TRUCKING

Five major trucking firms and seven local firms serve the area and points beyond.

In 1961 the B.C. Ferry authority initiated ferry service between the mainland and the Gulf Islands. Daily sailings are provided from Tsawwassen, docking at Galiano, Saturna, Mayne, Pender and Salt Spring Islands. These same islands are served by four sailings a day from Swartz Bay on Vancouver Island. The islands contain approximately 88 miles of pavement and 154 miles of gravelled roads. Half of this network serves Salt Spring Island. The mileage of road is increasing annually as new residential subdivisions are created.

The use of ferries increases substantially annually. During the summer months it is necessary to reach the ferry terminal at least an hour before sailing time to gain a space on the ferry. It is evident that existing facilities will soon be inadequate to handle summer traffic effectively.

INDUSTRY

The following table shows the distribution of labour in numbers and percentage among the various segments of industry in the Capital Region. This table is an estimate based on projections from actual figures gathered in 1966.

<u>Segment</u>	<u>No. Employed 1971</u>	<u>% 1971</u>
Service Industries	17,700	27.4%
Public Administration and Defense	15,100	23.4%
Trade	10,900	16.9%
Manufacturing	6,600	10.0%
Utilities	4,700	7.2%
Construction	3,000	4.6%
Finance, Real Estate and Insurance	2,700	4.1%
Primary	2,300	3.5%
Other	<u>1,900</u>	<u>2.9%</u>
Total	64,900	100.0%

The value of factory shipments was 121 million dollars in 1966 and is estimated to be between 125-130 million dollars for 1971.

The service industry tends to be slightly higher in the Victoria area than in the Canadian economy in general and reflects the large numbers of retired people in the area along with a larger than normal tourist trade generated by the excellent summer climate and other tourist attractions in Victoria and the surrounding area. The University of Victoria with about 5,000 students also tends to enlarge this segment of the economy.

Public Administration and Defense is the largest basic industry in the region and accounts for 23.4% of the employment in the area. While the defense part of this segment is declining, the other parts, such as the Provincial Government and the Municipal Government are expanding to meet the demands for more services from an expanding population. The following table gives a breakdown of this part of the economy as a percent of the total number of people employed within this segment.

Defense (Civilian and Military)	48.0%
Federal Government	14.5%
Provincial Government	28.8%
Municipal Government	<u>8.7%</u>
Total	100.0%

Because Victoria is the seat of government for British Columbia and headquarters for several Federal Government services, over 70% of the employment in the section is basic. In other words, it is not paid for by the taxpayer of the area. Local government services are classified as non-basic as the money spent is generated within the area.

The manufacturing segment of the economy is relatively small due to the cost of transportation off the island and, to a certain extent, a lack of raw materials. Approximately 50% of manufactured products are shipped out of the area with forest products accounting for the majority of this output. The Region has little in the way of forest resources within its boundaries with only 2% of the land covered with mature timber. However, due to location and labour supply, manufacturing of forest products takes place in the region. There are five major companies producing forest products which include lumber, plywood and shingle and shakes.

Transportation equipment is the next largest part of the manufacturing segment and is represented by shipbuilding and repair services. Due to lower labour costs in other parts of the world this business is confined to local ships which are too small to visit foreign yards and to the construction of barges and other vessels used in local waters. This business has undergone significant changes in the past few years with the demise of the shipbuilding section of Victoria Machinery Depot, although the company was able to successfully change to metal fabrications. The Federal Government's progressive reduction of subsidies to the industry is expected to continue and the existence of the industry in the area will depend to a large extent on its ability to attract local customers for special equipment and on the build-up of a local shipping industry requiring service and refit facilities. The aircraft repair business has declined steadily with the down grading of the Patricia Bay Airport over the past five years.

Other industries such as Food and Beverage manufacturing are the normal types of business found in any area and are largely non-basic in their output.

The following table from the Dominion Bureau of Statistics illustrates the employment in manufacturing industries in 1961 in the Greater Victoria area.

<u>Industry</u>	<u>1961 Employed</u>	<u>% of output that is basic</u>
Wood Products	1,689	82.0%
Transportation and Equipment	1,454	82.8%
Food and Beverages	1,041	5.7%
Printing, Etc.	772	31.0%
Chemical Products	252	43.7%
Other Industries	<u>546</u>	<u>--</u>
Total	5,754	52.8%

Fishing must be mentioned although no canneries are situated in the area and little fish processing takes place. There are, however, over 400 fishing boats based in Victoria. This generates a demand for repair facilities, fishing gear and marine products.

Construction is becoming an important factor in the economy, showing a growth rate of 5.1% per annum, when increased labour and material costs are discounted. Building permits for the Greater Victoria area were issued for a value of \$5,210,000 in 1968.

The future of industry in the region is limited by the growth in population. Some factors which mitigate against extensive expansion of industry in the area are the supply of labour, which, while readily available, is more expensive than in other parts of Canada. Wage rates are generally higher by as much as 5%, although they are slightly lower than those paid in the Vancouver area. Transportation costs are a major consideration in any island economy. Those industries which deal in large volumes of material will tend to locate close to markets or close to their supply of raw material, whichever is most convenient. Some industries are capable of locating in any area because the cost of transporting the raw

and finished materials are small in comparison to the cost of the product. These industries tend to locate where labour (usually specialized) is available and is stable and where processing costs can be controlled. The competition among the Regional and Municipal Governments for this type of industry is intense. The possibility of the Victoria region attracting this type of industry would appear to be only fair.

Employment Opportunities should be reasonably good in the wide diversity of industry in the Capital Region. Special training in clerical skills and other service oriented skills would be of considerable value for individuals seeking employment in this area.

Development Potential is considered to be limited by the geographical location although Government services at all levels are expected to expand and will result in growth of the overall economy.

REGIONAL DISTRICT
ADMINISTRATION, REGULATIONS AND ZONING

Legislation was adopted in 1965 providing for the establishment of Regional Districts in British Columbia. Before the end of 1965 six Regional Districts were formed and by the end of 1968 twenty-eight Regional Districts were established encompassing the entire province.

The Capital Regional District, covering 933.7 square miles, was incorporated February 1, 1966. At that time it was comprised of 18 directors, serving a total population of 181,936 people. It includes the following areas.

City; Victoria

Districts

Central Saanich

Esquimalt

North Saanich

Oak Bay

Saanich

Town; Sidney

Electoral Areas

Colwood

Langford

Metchosin

Sooke

View Royal

Salt Spring Island

Outer Gulf Islands

The Capital Region Planning Board is comprised of 8 representatives and 7 staff members. The office, in downtown Victoria, is well staffed to perform all the functions of a Regional District. It is probably the most active Regional District office in the province and has completed several studies related to planning and development of the region. Their bulletins entitled, "The Western Sector" and "Life on the Land" both offer detailed descriptions of the region and form a good basis for

planning. Their Socio-Economic Survey, March 1971, provides statistics relative to the economics of the region. "Gulf Islands Study, 1970" examines development problems on the islands.

In August 1969, The Regional District published a bulletin entitled, "Regional Parks". The study examines existing park facilities including National Parks, Provincial Parks, Regional Parks and Municipal Parks and outlines a plan for acquiring sufficient public use areas to satisfy the requirements of the expanding population. The survey points out that walking is the most popular recreational function within the region and, therefore, the study proposes a network of walking and nature trails.

The development of Regional Parks requires financing for acquisition, development, maintenance, operation, administration and planning. The people are taxed at the rate of $\frac{1}{2}$ mill to provide the funds for these functions. The province then, contributes $\frac{1}{3}$ of the amount raised by taxation. The Capital Regional District has been developing land for Regional Park purposes on this basis for several years and they are constantly studying prospective acquisitions. Although the subject was never studied in the report, it is possible that certain Indian Reserves within the region would represent considerable value for Regional Park purposes. As population pressures increase and the large open spaces decrease, large acreages of recreational land will become a valuable commodity to the people of the region.

Other projects sponsored by the Regional District include the construction of a swimming pool serving Colwood, Langford and Metchosin; a family and children's court in Victoria, Saanich, Oak Bay and Esquimalt; trunk sewers and sewage disposal systems; Regional Parks at Colwood and Langford; and an ice arena and recreational complex at Colwood and Langford.

Thus, it is illustrated how areas which were formerly unorganized and unable to finance community facilities can enjoy these amenities through the functions of the Regional District. The Regional District is primarily concerned with good land use and the preservation of a pleasant environment.

One of the most significant regulations presently administered by the Regional District is subdivision control. The present subdivision bylaw restricts the size of lots within subdivisions to 10 acres over

most of the district. Isolated localities have been defined where the minimum sized lot is 2 acres or 5 acres. The entire Gulf Islands is subject to the 10 acre minimum. Subdivision was proceeding at an uncontrolled and rapid pace, particularly in the Gulf Islands. The pleasant open areas were being consumed and the Regional District felt that controls were necessary in order to avoid a hodgepodge of lots which would be difficult to service with water and sewer in the future. When a detailed subdivision and zoning bylaw is completed for the region, the restriction may be lifted from certain areas.

Indian Bands would benefit through cooperating with the Regional District in their developments plans. It is conceivable that services such as water, road and sewer will eventually reach lands adjacent to Indian Reserves and thus the value of reserve lands will increase. It is difficult to plan profitable developments within Indian Reserves without being conversant with Regional planning. Likewise, Regional planning should include a consideration of Indian Reserves and, therefore, Indian Bands and the Regional District have a common basis for a profitable relationship.

LAND VALUES

The following value ranges are suggested for various land uses and can be used as a guide to estimate the approximate value of specific parcels. However, because of the many factors affecting value within the region these figures should not be interpreted to be representative of true market value for a specific parcel.

Residential developments are scattered through the region in different localities and lot values vary within and between neighbourhoods. The following schedule, therefore, examines residential land values more closely.

RESIDENTIAL

Victoria City

- With view of water - \$200-\$250 per front foot
- Prestige neighbourhoods - \$175-\$200 per front foot
- Older good class homes - \$125-\$200 per front foot
- Older medium class homes - \$125-\$150 per front foot
- Older, poorer class neighbourhoods - \$100-\$125 per front foot.

Oak Bay

- Water front - \$300-\$400 per front foot
- Prestige neighbourhoods - \$300 per front foot
- Newer good neighbourhoods - \$175-\$195 per front foot
- Older good neighbourhoods - \$160-\$185 per front foot
- Older poorer neighbourhoods - \$135-\$150 per front foot

Saanich

- Water front - \$200-\$300 per front foot
- Newer good class neighbourhoods - \$100-\$150 per front foot
- Older good neighbourhoods - \$100-\$120 per front foot
- Older poorer neighbourhoods - \$80-\$100 per front foot

Esquimalt

- Water front - \$200 per front foot
- Newer good class neighbourhoods - \$100-\$125 per front foot
- Older medium class neighbourhoods - \$90-\$110 per front foot
- Older poorer class neighbourhoods - \$80-\$100 per front foot

View Royal

Water front - \$200 per front foot

Newer good class neighbourhoods - \$100-\$125 per front foot

Older good class neighbourhoods - \$70-\$90 per front foot

Older poorer class neighbourhoods - \$50-\$60 per front foot.

Note - lots serviced with water and sewer are generally valued at the upper limit of the range while lots without sewer are at the lower limit.

RESIDENTIAL ACREAGE

Once again it is difficult to generalize because so many factors affect the potential of acreage to be developed for residential purposes. Further, the present Regional restrictions limiting the size of lots developed by subdivisions to 2, 5 and 10 acres has actually caused some parcels to become relatively valueless. If a parcel can not be legally subdivided for residential purposes, it might then represent value for agricultural purposes only and, in most cases, the value per acre would, therefore, decline. Assuming that there is no restriction to residential subdivisions, the value of acreage with a subdivision potential ranges between \$2,000 and \$10,000 per acre. Acreage can be purchased in the western sector at the lower limit of this range while acreage adjacent to developed neighbourhoods and perhaps with a sea view would be valued at the upper limit. The size of the parcel would also influence the value. Parcels less than five acres would command a higher value per acre than parcels more than five acres in size. The availability of services and amenities would also influence price. Generally, an average residential development potential would be valued in the mid range, between \$4,000 and \$7,000 per acre.

AGRICULTURAL LAND

Once again, the demand for acreage for residential development purposes has escalated to a level where it has no relationship to the income producing potential of the farm. Values range between \$3,000 and \$4,000 per acre.

DOWNTOWN COMMERCIAL

Prime neighbourhoods - \$15 per square foot
Secondary neighbourhoods - \$8 per square foot

INDUSTRIAL

\$1.75 to \$3.00 per square foot

OPERATING FARMS

Dairy farm, 40 to 50 cows - \$120,000 - \$150,000
Mixed farm, 10 to 15 acres in small fruit
and vegetables - \$50,000-\$70,000

URBAN DEVELOPMENTWESTERN SECTOR

The western sector has experienced a growth rate higher than average during recent years. Between 1961 and 1966 this rate ranged between 4% and 7%. Most of the growth took place in and adjacent to the existing settlements of East Sooke, Sooke, Jordan River and Fort Renfrew.

Sooke is developing a reasonably dense core surrounding the existing commercial centre and merchants report that their business has increased considerably in volume during the past five years. Sooke is within commuting distance of Victoria. The growth at Jordan River has been less than average because it is essentially an industrial centre. Its recreation potential may cause its growth rate to accelerate in the future. Fort Renfrew serves the logging division of B.C. Forest Products Ltd. and its growth will depend on the growth of that industry. East Sooke has no commercial centre. It is essentially composed of a sparse scattering of homesites.

Recreation and retirement is becoming a more prominent growth force within the western sector. Realtors report that nearly half of their property purchasers are from outside the region. People from the United States and the Prairies are well represented. Hotels, motels and resorts are enjoying an increase in business. The area is relatively sparsely populated and can support much more growth.

The value of building starts by year provides an indication of growth trends. However, no such statistics are available for the Sooke area but the following population figures showing past growth and anticipated future growth will provide some measure.

<u>Year</u>	<u>Population</u>
1961	2,817
1966	3,478
1971	4,290
1981	5,830
1991	7,930
2001	10,000

METRO VICTORIADWELLING UNIT STARTS IN METROPOLITAN VICTORIA1961-1970

(including duplex dwelling units but not apartments)

	1961		1964		1967		1970	
	D.U. Starts	% of Total Starts	D.U. Starts	% of Total Starts	D.U. Starts	% of Total Starts	D.U. Starts	% of Total Starts
Victoria	83	10.2	63	6.7	66	7.4	37	4.7
Saanich	409	50.1	496	53.0	411	46.2	216	27.3
Oak Bay	89	10.9	57	6.1	30	3.4	11	1.4
Esquimalt	68	8.3	31	3.3	36	4.1	39	4.9
Central Saanich	31	3.8	73	7.8	78	8.7	90	11.4
Sidney	20	2.4	36	3.8	62	6.9	94	11.9
North Saanich	65	7.9	36	3.8	48	5.3	42	5.3
View Royal, Langford, Col- wood, Metchosin	52	6.4	144	15.4	159	17.8	262	33.0
Totals	817		936		890		792	

Source: Central Mortgage and Housing Corporation

VALUE OF BUILDING PERMITS IN METROPOLITAN VICTORIA, 1961-1970 (\$'000)

<u>Municipality</u>	<u>1961</u>	<u>1966</u>	<u>1968</u>	<u>1970</u>
Victoria	10,738	17,203	26,309	22,280
Saanich	8,701	13,928	20,474	14,477
Oak Bay	3,067	2,012	2,665	2,509
Esquimalt	1,894	2,264	1,822	3,453
Central Saanich	492	1,345	2,232	2,148
Sidney	397	788	2,544	2,319
North Saanich	565	787	1,194	1,406
Langford, Colwood Metchosin and View Royal, excludes Highlands	742	2,590	4,114	5,923
Totals	26,596	40,917	61,354	54,515

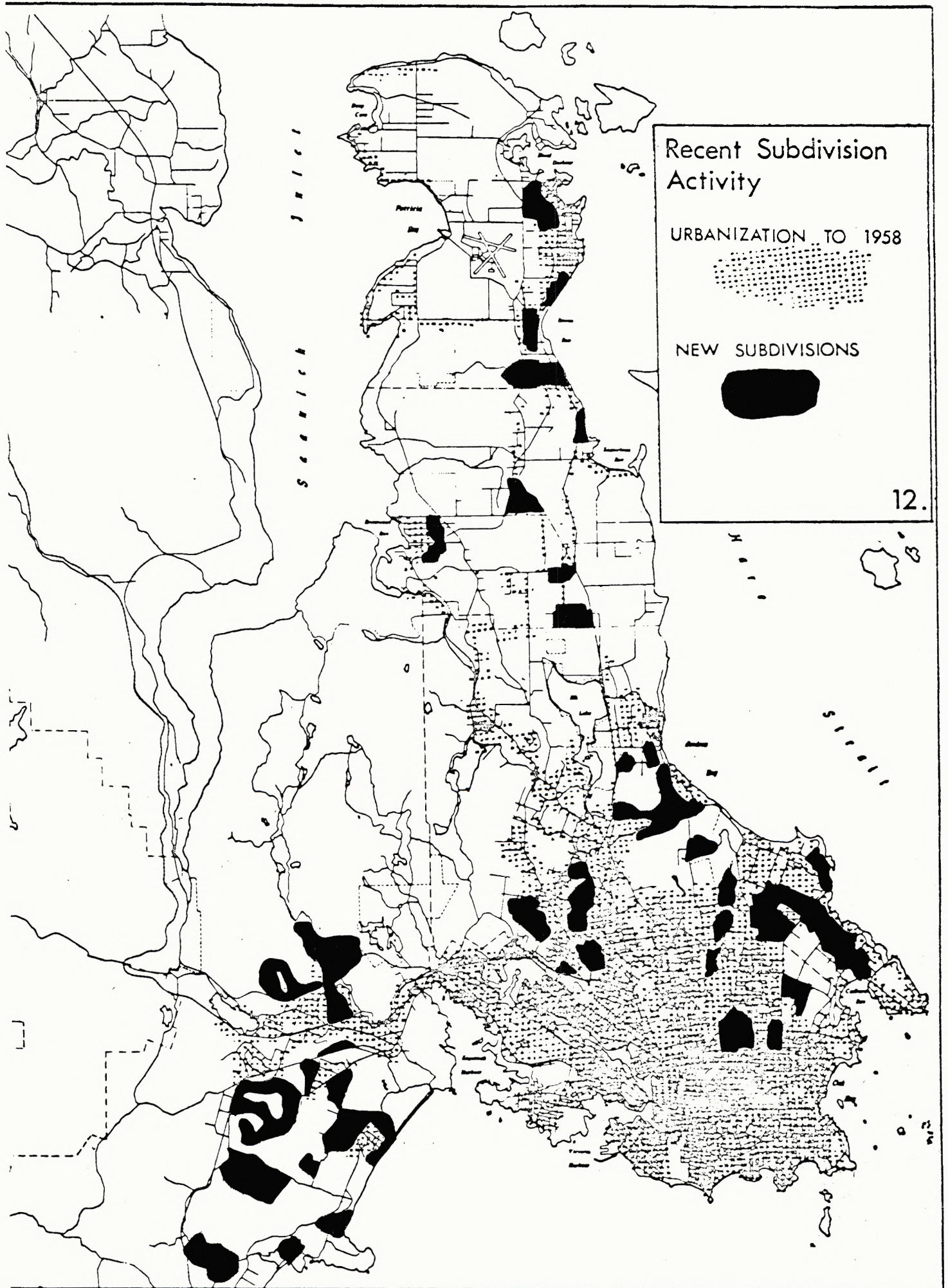
Sources: Building Departments of the listed municipalities and of the Capital Regional District; B.C. Government records.

Saanich has been the leader in house construction since 1960. And this trend is expected to continue. It is interesting to note, however, that Central Saanich and Sidney become more prominent each year. The projection to the year 2001 shows most growth to take place in Central Saanich. The growth in apartment dwellings (not included in the above table) has been astronomical within the City of Victoria in 1970, 25 apartment dwelling units were started for every single family dwelling. 1964 was a big year for apartment construction when 1,434 units were constructed within the City of Victoria. During this same year only 63 single family dwelling units were started.

The Capital Regional District is anxious to preserve the open spaces and discourage urban sprawl. Some communities are still being developed in a loosely knit, poorly coordinated pattern but for the most part, development has been contained within existing neighbourhoods. The Saanich Municipality is aware of the dangers of urban sprawl and have endorsed an Urban Containment Policy which is designed to fill in the gaps and encourage low cost servicing. The following map, prepared by the Capital Regional District, shows recent subdivision activity in relation to urbanized areas which developed prior to 1958. For the most part, subdivisions were confined to the areas which were already experiencing urban growth.

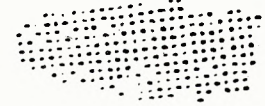
In view of the present subdivision regulation which limits the minimum size of subdivided lots to 10 acres, it is not possible to isolate specific areas which will experience significant growth in the future. However, the population estimates show that Central Saanich will experience the greatest growth and, therefore, it is fairly evident that most of the urban development will occur in that area in the future. The Regional District, however, will approve subdivisions only in specified growth areas in order to discourage urban sprawl and, therefore development will likely occur adjacent to existing population centres.

From a land use point of view and particularly from the view point of Indian Band members, the future growth in the Central Saanich area will be of interest. Some of the most attractive Indian Reserves lie within this region and, therefore, their development can be coordinated with development planning for the entire region.



Recent Subdivision Activity

URBANIZATION TO 1958



NEW SUBDIVISIONS



12.

GULF ISLANDS

The Gulf Islands contain a total permanent population of nearly 4,000 people. If summer residents were included, the figure would nearly double. During the past ten years land subdivision has been proceeding at an alarming rate and the Capital Regional District is very much concerned with the quality of subdivision and the fact that it is not in accordance with an overall development plan.

Since 1960 the sale of large acreage parcels has been brisk. Most purchasers were land developers anxious to develop his own community. The following table shows the number of parcels over five acres in size sold from 1960 to 1968.

VACANT LAND SALES
LARGE PARCELS,* 1960-1968

Island	Major Activity		Parcels	
	Date	Number	Acres	
Saturna	1964	4	640	
S. Pender	1966	2	72	
N. Pender	1963	15	623	
Mayne	1960	20	869	
Galiano	1964	15	740	
Saltspring N.	1960	83	3,805	
Saltspring S.	1960	21	2,127	
Saltspring (Ganges)	1961	4	33	
Total		164	8,909	

* Figures for parcels of over 5 acres each include resales, mainly on Saltspring Island.

It is interesting to observe subdivision activity from 1959 to 1968, illustrated on the following table.

SUBDIVISION ACTIVITY* 1959-1968

Islands	Number of Lots Subdivided										Total Develop. 1959-68	No. Areas
	1959	1960	1961	1962	1963	1964	1965	1966	1967	1968		
Saltspring	122	144	103	15	57	197	74	118	129	168	1107	19
<u>Outer Gulf Islands</u>												
Saturna	84	64	6	--	6	5	1	17	52	21	256	4
Mayne	29	146	63	67	198	23	55	32	38	11	662	8
Galiano	30	29	23	10	30	28	25	51	46	48	320	11
N. Pender	2	28	16	6	61	169	67	10	145	229	733	9
S. Pender	1	37	4	--	4	--	11	--	5	4	66	2
Total	268	448	215	98	356	402	233	228	415	481	3144	53

* Lots of two acres or less.

Over 3,000 lots have been created by subdivision since 1959. North Pender Island alone contained only 500 registered lots by the end of 1967 and it is now reported to contain approximately 1,500 lots. Nearly half of the lots subdivided have been built upon and half of the developed lots support permanent residences. The remainder are developed as summer homesites.

Between October 28, 1969 and March 30, 1970, subdivision applications involved approximately 1,900 lots. This surge of activity was the result of B.C. Regulation 274/69, enacted on October 28, 1969 to require a ten acre minimum lot size for all new subdivisions in the Gulf Islands. The subdivision approving officers could entertain no new subdivision proposals submitted after that date but all existing proposals, in various stages of development, were given until March 31, 1970 to complete their submissions. Therefore, developers were frantic to have their subdivisions approved prior to March 31, 1970. Consequently, at the present time, the supply of subdivided lots exceeds the demand but eventually the situation will reverse.

From a land use point of view it is evident that the Gulf Islands represent a good potential for the development of recreational neighbourhoods. However, development in the past has been unregulated without providing adequate services. At the present time a surplus of lots have flooded

the market and it may not be a good time to embark on a land development scheme. However, it is conceivable that a particularly attractive parcel might have much more appeal than any of the existing subdivisions and its chance of being developed successfully would be good. It is difficult to generalize without examining in detail the characteristics of existing developments.

EMPLOYMENT OPPORTUNITIES

It is difficult to be specific on the subject of employment opportunities when we are dealing with a region containing a large metropolitan centre like Victoria. With the several manufacturing plants, both large and small, service outlets, and warehouse facilities, etc., the usual opportunities exist for those who persist. However, the untrained will have difficulty in finding and keeping a job. Canada Manpower have recognized the need for qualified workers and in an attempt to reduce unemployment, the centre offers educational and training programs for those who are unemployable because of lack of training. The untrained worker, therefore, will have difficulty in holding his job because he will always be exposed to the danger of being replaced by a more qualified worker.

Victoria, being the Provincial seat of Government, offers a better chance for the employment seeker than most other regions. The total labour force within metro Victoria exceeds 60,000 persons. Nearly 15,000 or one quarter of the total is employed in public service. Acres Western Limited in their Economic Survey of Metro Victoria have estimated that by 1981 over 18,000 people will be employed in the public service. Thus, over 3,000 jobs will be created within the next ten years in this sector of the labour force alone. Further, Victoria is the hiring headquarters for summer assistance. Thousands of summer assistants are hired during the summer each year by departments who conduct field work throughout the province. It is not uncommon for a summer job to develop into a permanent job at the end of the field season.

The Federal Department of Fisheries and Forests, with head offices in Vancouver and Victoria, also hires summer assistance in their research projects. Such jobs, whether Provincial or Federal, provide an opportunity for young men and women to find out where their interest lie while gaining technical training.

Private research companies, consultant forestry and engineering firms and other private sectors who are concerned with natural resources often increase their staff during the summer time. Once again, the employee might be laid off when the field season terminates but he gains experience which puts him in a better position for eventually holding a permanent job.

The Department of Industrial Development, Trade and Commerce publish

an annual bulletin entitled, "A Summary of Regional Investment Opportunities in British Columbia". Chambers of Commerce and Boards of Trade from centres throughout the province contribute information to the document. It is concerned primarily with development opportunities, but development breeds employment and, therefore, it is interesting to examine the bulletin.

CENTRAL SAANICH MUNICIPALITY

Tourist traffic to and from Victoria from the ferry terminal at Sidney increases substantially annually. With the new highway nearly completed, an opportunity exists for new hotels and motels adjacent to the highway. Restaurants and a shopping centre should succeed. With increased tourist traffic, marina and park facilities will be in demand.

SAANICH MUNICIPALITY

More accommodation will be required to meet the increased tourist flow. Financing is required for residential construction. Tourist facilities such as camping and trailer grounds and restaurants will be required. Industrial parks and warehousing will be in demand.

SIDNEY TOWN

Demand will increase for hotels and motels with expanding tourist trade. Restaurants, retail outlets, moorage for pleasure craft and fish boats, all will require expanding as populations increase.

Industrial: Warehousing, assembly and distribution of outboard motors, electrical engines and equipment, power tools and small farm implements; a seed growing and packaging industry; poultry and egg processing plant; meat packing plant.

SOOKE

Opportunity for further motel and hotel development. Potential exists for further development of harbour area.

GALIANO ISLAND

Demand for motels and hotels will increase with expanding tourist trade.

Commercial: Cafe, bakery, coffee shop, barber shop, lady's hair-dressing salon.

Recreation: An opportunity exists for the development of a recreational complex catering to marine traffic.

Agriculture: Bulb or flower growing, small fruits or berries and market gardens.

SALT SPRING ISLAND

An opportunity exists for the development of a deluxe resort area.

SUMMARY AND FUTURE OUTLOOK

British Columbians can be thankful that James Douglas had the foresight to secure Fort Victoria in the name of the Hudsons Bay Co. at the time when the international boundary was being disputed. Victoria, British Columbia's capital city, has grown as one of the foremost beauty spots of the world primarily because of her natural climatic and physical advantages. It has become a mecca for summer tourists and a winter retreat and retirement paradise for British Columbians and to a lesser extent to people from all over the world.

The region is blessed with areas of fertile soil supporting a thrifty agricultural industry, feeding the metropolitan area. Its natural vegetation is extremely attractive and, in fact, park-like in certain areas offering a pleasing recreational environment.

It is the only region in British Columbia where a full 365 consecutive days without frost might occur. It is the only coastal region where the advantages of seaside living are present without the usual high rain falls. Its 2,216 hours of bright sunshine per year is exceeded nowhere within the province.

The present population, estimated at 208,860 people, is expected to increase to 380,900 by the year 2001, representing an average annual increase of 2.3%. In view of the many advantages of the area, as a place to live, it is surprising that the estimated rate of population increase is not higher. However, planners and economists must recognize the limitations of an island economy when formulating their projections. The Capital Region displays unusual population characteristics. The percentage of people over 65 years of age ranges between 11% and 27%, higher than any other region in the province. Over 25% of the labour force is employed in public service and 10.3% of the total income is derived from interest and dividends. No other region within the province can exceed these figures. From a land use point of view, it is apparent that land development and housing schemes should certainly be directed towards satisfying the needs of older people.

The forests of the region are, for the most part, privately owned with some public areas within the western sector. A significant number of people are employed in the logging industry in the western sector and

some large manufacturing and processing plants are located throughout the district, however, only 11% of the labour force is employed in manufacturing with 30% of the manufacturing work force employed by the forest industry. Forestry, therefore, does not bear a strong influence on the total economy of the region.

Tourism contributed \$80 million to the economy of Vancouver Island in 1970 with the largest portion being spent within the Capital Region. It has been predicted that this expenditure will double in ten years and will likely exceed \$30 million in the Capital Region alone by 1981. Tourist facilities are crowded during the summer months and a shortage of campsites is evident. With such brisk expansion forecasted it is likely that significant development projects will be completed in the future to meet the demand. With the mild winter climates the Capital Region enjoys a longer tourist season than other areas in the province. Winter sports fishing in tidal waters is a significant contributor to tourism with record catches often recorded from December to April. Summer homesites are much more prevalent within the Gulf Islands than on the main island. In fact the recent uncontrolled increase in summer homesite subdivisions on the Gulf Islands has been phenomenal. Marine campsite parks have been constructed by the Provincial Government within the islands to serve the increasing number of families who spend their holidays travelling the water ways between the islands. Recreation will undoubtedly strongly influence land use planning in the future.

The number of people employed in the commercial fishing industry is declining within the region but this activity still represents an important way of life to many people. The industry does not contribute significantly to the region's economy and its significance is not expected to increase in the future.

Agriculture enjoys great advantages within the region. The productive farms of the Saanich Peninsula lie only a few miles from a large metropolitan centre providing a ready market for products. Production has been intensified, farm incomes are high and land values are increasing. Fresh horticultural and dairy products are marketed with the season for fresh produce extended by the use of greenhouses. Approximately 744 acres are devoted to truck farming. Agriculture is a profitable land use within the Capital Region.

The B.C. Government ferry system plays an important role in the transportation facilities of the region. Besides providing an important commercial link with the mainland and the Gulf Islands, the system is a valuable tourist attraction during the summer months. Congested ferry terminals is a common complaint nowadays and the Provincial Government is constantly reviewing plans to improve the service.

Over 50% of the population of the region is employed in the service industries, public administration and defense. Only 10% of the total labour force is employed in manufacturing. However, the value of factory shipments in 1971 will exceed \$125 million and, therefore, it represents an important segment of industry. Manufacturing is not expected to grow proportionally within the region because its potentials are limited by the disadvantages of an island economy.

The Capital Regional District performs its functions under a staff of qualified planners devoted to encouraging good land use and the preservation of a pleasant environment. The people participate in land use planning through various committees and the effectiveness of the layman planner is improved significantly by the several bulletins published by the Regional District. Several service facilities and recreational conveniences have been provided and paid for through regional taxation. The Regional Park concept is well advanced with three such parks being developed and a land acquisition program under way. The Regional District is anxious to cooperate with the Indian Bands to assist them in planning orderly development of their lands in a pattern which compliments planning throughout the region.

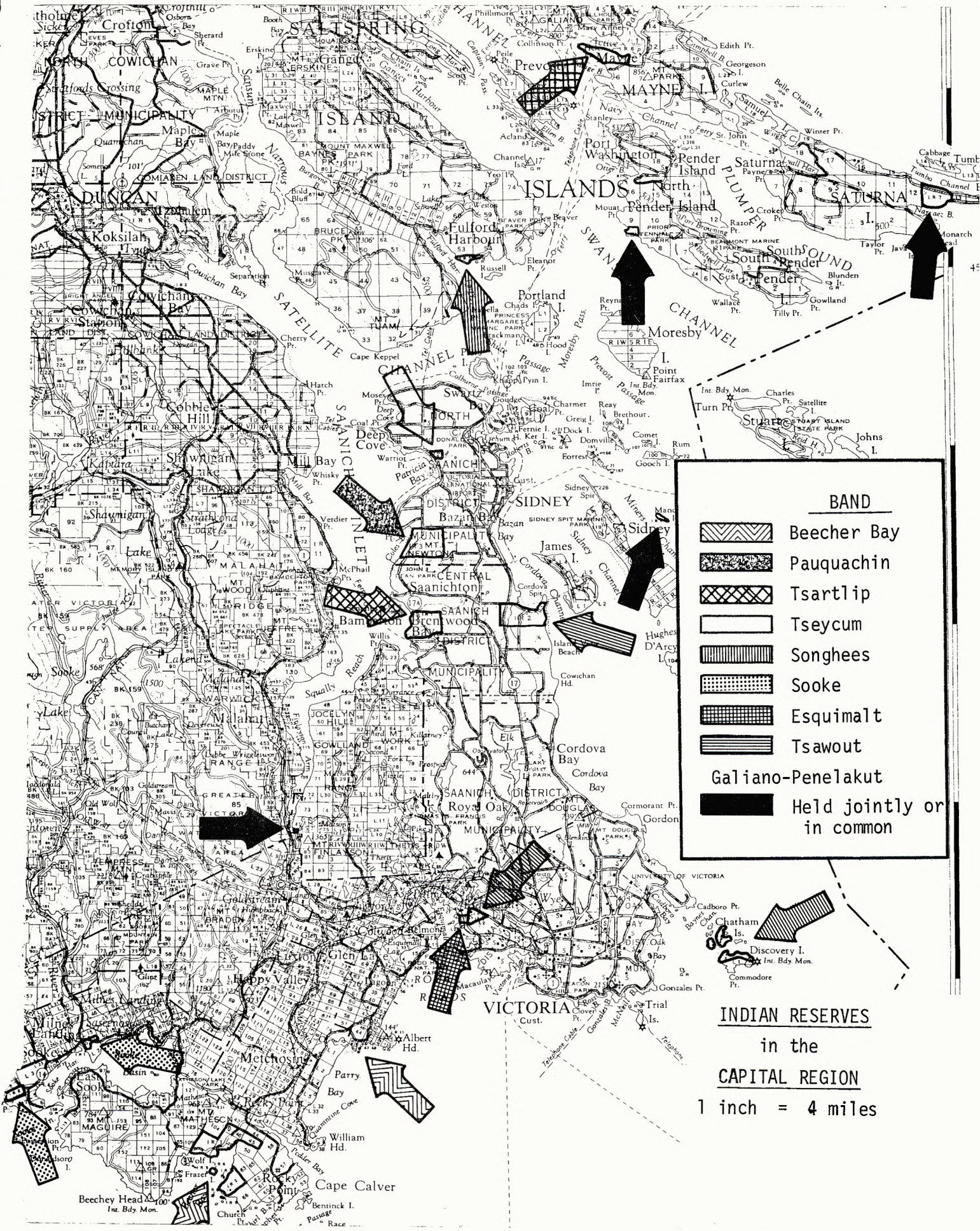
Residential land values within the metropolitan area are high and the effect of urban encroachment into agricultural areas is pushing up farm land values.

Saanich has experienced the most brisk urban development in recent years. As lands suitable for residential development become occupied it is expected that the movement will extend into Central Saanich. The 30 year forecast anticipates more urban development within Central Saanich than in other areas of the region. The western sector has experienced slightly above average growth in recent years primarily due to the influx of retirement people. This growth is expected to accelerate in the future along with an expansion of commercial and recreational facilities to serve




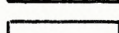
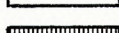
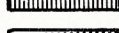

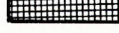

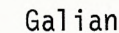
the escalating population. Subdivision activity within the Gulf Islands creating recreational and retirement lots has been exceptionally brisk during recent years. The development has been relatively uncontrolled and not in accordance with an overall plan of development for the islands and, therefore, the Regional District has given much attention to encouraging more orderly development. To discourage any further urban development on the main island and scattered satellite developments on the Gulf Islands, a regulation was enacted in 1969 limiting the size of subdivided lots to 2, 5 or 10 acres. Thus, residential subdivisions have virtually been halted until an overall land use and subdivision plan has been approved for the region.

Although most segments of the region's economy will experience normal growth in the future, recreation and residential development to serve the influx of retiring people will increase in relative importance to the economy. The Regional District's enthusiasm for preserving open spaces will likely encourage further agricultural development. As the population increases it is not likely that the present farm production could feed the large metropolitan area. Already considerable produce is being imported. The owners of large acreages are indeed in an enviable position. There will be a shortage of land for specific uses and properly planned land development schemes can proceed with very little risk of failure.

PART II
REFERENCE
to
SPECIFIC RESERVES



BAND

-  Beecher Bay
-  Pauquachin
-  Tsartlip
-  Tseycum
-  Songhees
-  Sooke
-  Esquimalt
-  Tsawout
-  Galiano-Penelakut
-  Held jointly or in common

INDIAN RESERVES

in the
CAPITAL REGION

1 inch = 4 miles

RESERVE AND BAND DATAINDIAN BANDS WITH LAND IN THE CAPITAL REGION

	Beecher Bay	Esquimalt	Songhees	Sooke	Tsawout	Tseycum	Pauquachin	Tsartlip	Penelakut	TOTAL
Residents on Reserve	62	40	112	32	192	35	104	290	307	1,174
Residents off Reserve	30	28	34	9	63	38	35	50	74	361
Total Population	92	68	146	41	255	73	139	340	381	1,535
Number of Reserves	8	1	3	2	2	1	1	3	1	22*
Total Area	732.76	44.31	303.87	163.26	645.44	67.80	698.2	801.65	71.84	3,529.13**
Number of Leases	4	6	7	2	1	0	2	1	12	34
Annual Rental (\$)	2,000	7,800	15,600	--	600	--	3,900	400	2,600	39,900
Chief	J. Charles	E. Joe	J. Albany	J. Cooper	H. Pelkey	S. Jones	M. Henry	P. Paul	A. James	
Pupil Enrollment	23	19	33	8	10	--	42	117	86	335
Welfare (Annual) (\$M)	16.2	1.8	12.5	3.2	32.0	12.6	29.8	56.8	58.9	223.8
Employment (Permanent)	2	6	14	7	21	2	17	34	35	139

* - Plus 4 reserves held in common or jointly = 26

** - Plus 406.00 acres held in common or jointly = 3,935.13 acres

INDIAN RESERVES
WITHIN THE CAPITAL REGION

BEECHER BAY BAND

Beecher Bay No. 1	473.26 acres	
Beecher Bay No. 2	235.00	
Lamb Island No. 5	.50	
Fraser Island No. 6	14.00	
Village Islands No. 7	3.00	
Whale Island No. 8	2.00	
Long Neck Island No. 9	4.00	
Twin Island No. 10	<u>1.00</u>	
		732.76 acres

ESQUIMALT BAND

Esquimalt Reserve		44.31 acres
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SONGHEES BAND

Chatham Islands No. 4	57.00 acres	
Discovery Island No. 3	90.00	
New Songhees No. 1A	<u>156.87</u>	
		303.87 acres

SOOKE BAND

Sooke No. 1	62.26 acres	
Sooke No. 2	<u>101.00</u>	
		163.26 acres

Held in Common or Jointly

Saturna Island No. 7 Tseycum and Tsawout Bands	360.00 acres	
Pender Island No. 8 Tseycum and Tsawout Bands	8.00	
Bare Island No. 9 Tseycum and Tsawout Bands	26.00	
Goldstream No. 13 Tsartlip, Tsawout, Malahat and Pauquachin Bands	12.00	
		406.00 acres

	<u>TSAWOUT BAND</u>	
Saanichton No. 2		602.44 acres
Fulford Harbour No. 5		<u>43.00</u>
		645.44 acres
	<u>TSEYCUM BAND</u>	
Union Bay No. 4		67.80 acres
	<u>PAUQUACHIN BAND</u>	
Cole Bay No. 3		698.20 acres
	<u>TSARTLIP BAND</u>	
Main Island No. 6		323.00 acres
Senanus Island No. 10		3.90
South Saanich No. 1		<u>474.75</u>
		801.65 acres
	<u>PENELAKUT BAND</u>	
Galiano Island No. 9		<u>71.84</u> acres
TOTAL		3,935.13 acres

POPULATION CHARACTERISTICS
OF INDIAN BANDS IN THE CAPITAL REGION

(1969)

Age Group	Male	Population	Female	Total
<u>BEECHER BAY</u>				
0-14	15		24	39
15-19	5		6	11
20-54	13		12	25
55-69	3		4	7
70-84	3		1	4
	<u>39</u>		<u>47</u>	<u>86</u>
<u>ESQUIMALT</u>				
0-14	12		22	34
15-19	2		3	5
20-54	10		11	21
55-69	2		1	3
70-79	1		1	2
	<u>27</u>		<u>38</u>	<u>65</u>
<u>PENELAKUT</u>				
0-14	73		87	160
15-19	20		21	41
20-54	55		65	120
55-69	16		14	30
70-94	6		6	12
	<u>170</u>		<u>193</u>	<u>363</u>
<u>PAUQUACHIN</u>				
0-14	27		31	58
15-19	6		11	17
20-54	24		27	51
55-69	4		2	6
70-84	2		2	4
	<u>63</u>		<u>73</u>	<u>136</u>
<u>TSARTLIP</u>				
0-14	86		81	167
15-19	15		22	37
20-54	58		65	123
55-69	3		4	7
70-79	6		5	11
	<u>168</u>		<u>177</u>	<u>345</u>

Age Group	Male	Population	Female	Total
<u>TSAWOUT</u>				
0-14	48		70	118
15-19	16		16	32
20-54	49		43	92
55-69	6		4	10
70-89	6		3	9
	<u>125</u>		<u>136</u>	<u>261</u>
<u>TSEYCUM</u>				
0-14	9		11	20
15-19	3		5	8
20-54	15		15	30
55-69	3		3	6
70-89	--		2	2
	<u>30</u>		<u>36</u>	<u>66</u>
<u>SONGHEES</u>				
0-14	22		33	55
15-19	6		4	10
20-54	27		37	64
55-69	7		7	14
70-89	3		2	5
	<u>65</u>		<u>83</u>	<u>148</u>
<u>SOOKE</u>				
0-14	6		10	16
15-19	2		4	6
20-54	7		6	13
55-69	1		2	3
70-84	1		1	2
	<u>17</u>		<u>23</u>	<u>40</u>

DEVELOPMENT POTENTIALS

Part I of this report studies regional socio-economic conditions with an occasional reference to factors which affect the value and use of Indian Reserve lands. It is not the purpose of the report to recommend development projects and, therefore, individual reserves were not examined in detail. Those reserves which could be reached by road were examined casually in order to gain an impression of what development potentials might exist. Time would not permit an examination of reserves within the Gulf Islands. Information on reserves which were not visited was supplied by officers of the Indian Affairs Branch at Nanaimo.

Part II of the report will offer a brief description of each reserve and relate its physical characteristics to socio-economic factors presented in Part I in order to identify development potentials if any. Several reserves have already been studied in detail as part of previous land use or development feasibility studies. It is not the purpose of this report to critically analyze existing development proposals, rather to suggest whether or not the present economic climate would support the development.

BEECHER BAY BAND

Beecher Bay No. 1 was studied by the Regional Planning Board in 1969. The report recommended selective logging, Band housing, a marina, campsite, and picnic site; a residential subdivision and sheep ranching. The development of a marina and campgrounds is presently in progress taking advantage of the attractive sea frontage and the increasing demand for such facilities within the region. The islands fronting Indian Reserve No. 1 and 2 comprise Indian Reserves No. 5, 6, 7, 8, 9 and 10. They are presently unused but represent an attractive chance for picnicking associated with recreational developments on reserves 1 and 2.

ESQUIMALT BAND

Esquimalt Reserve is committed to industrial uses. B.C. Forest Products hold a foreshore lease fronting the reserve and Victoria Plywood Co. Ltd. operate a plywood manufacturing plant thereon. The reserve is

BEECHER BAY NO. 1

VILLAGE ISLAND NO. 7

BEECHER BAY NO. 2

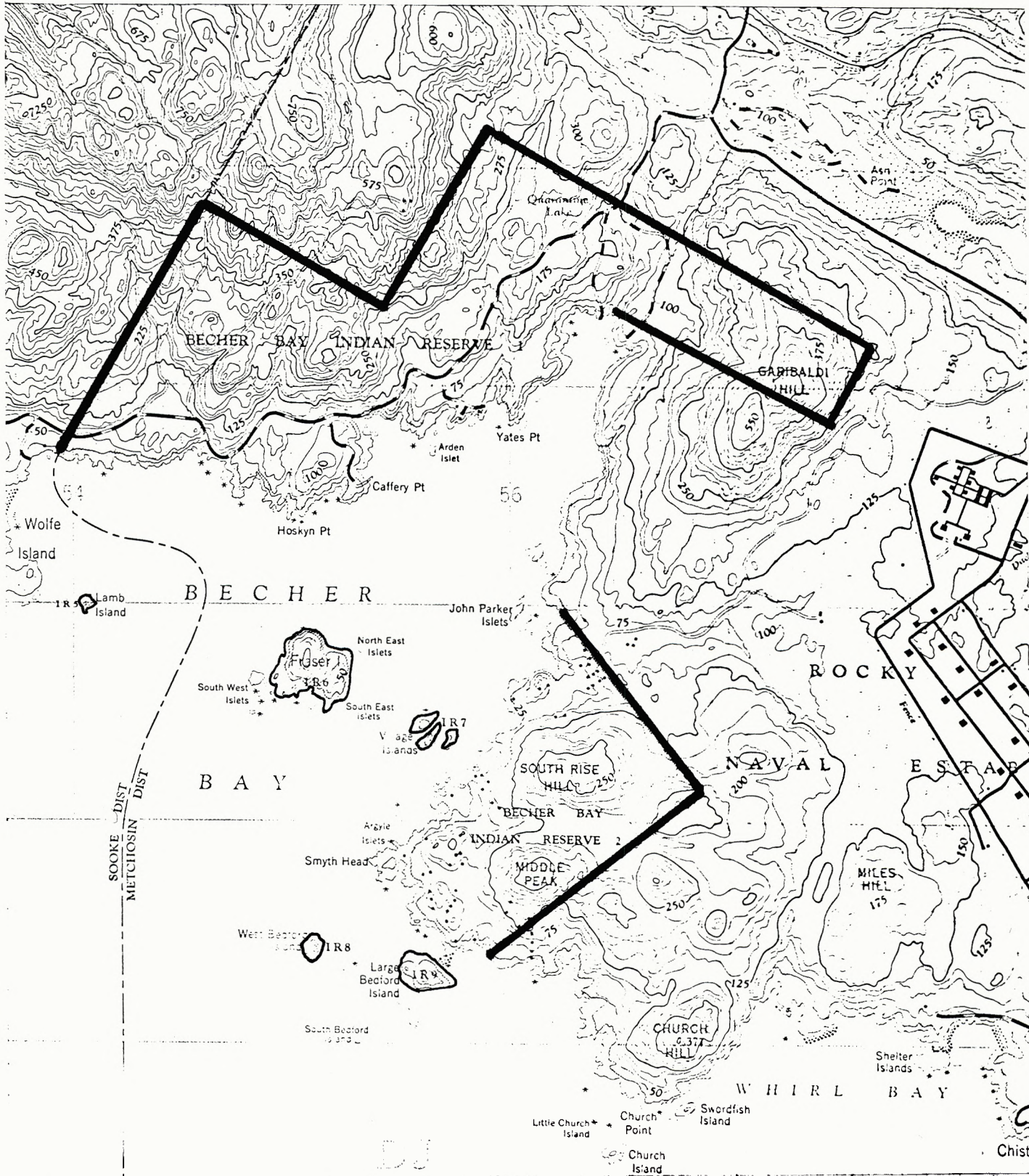
WHALE ISLAND NO. 8

LAMB ISLAND NO. 5

LONG NECK ISLAND NO. 9

FRASER ISLAND NO. 6

Scale: 2½ inches = 1 mile



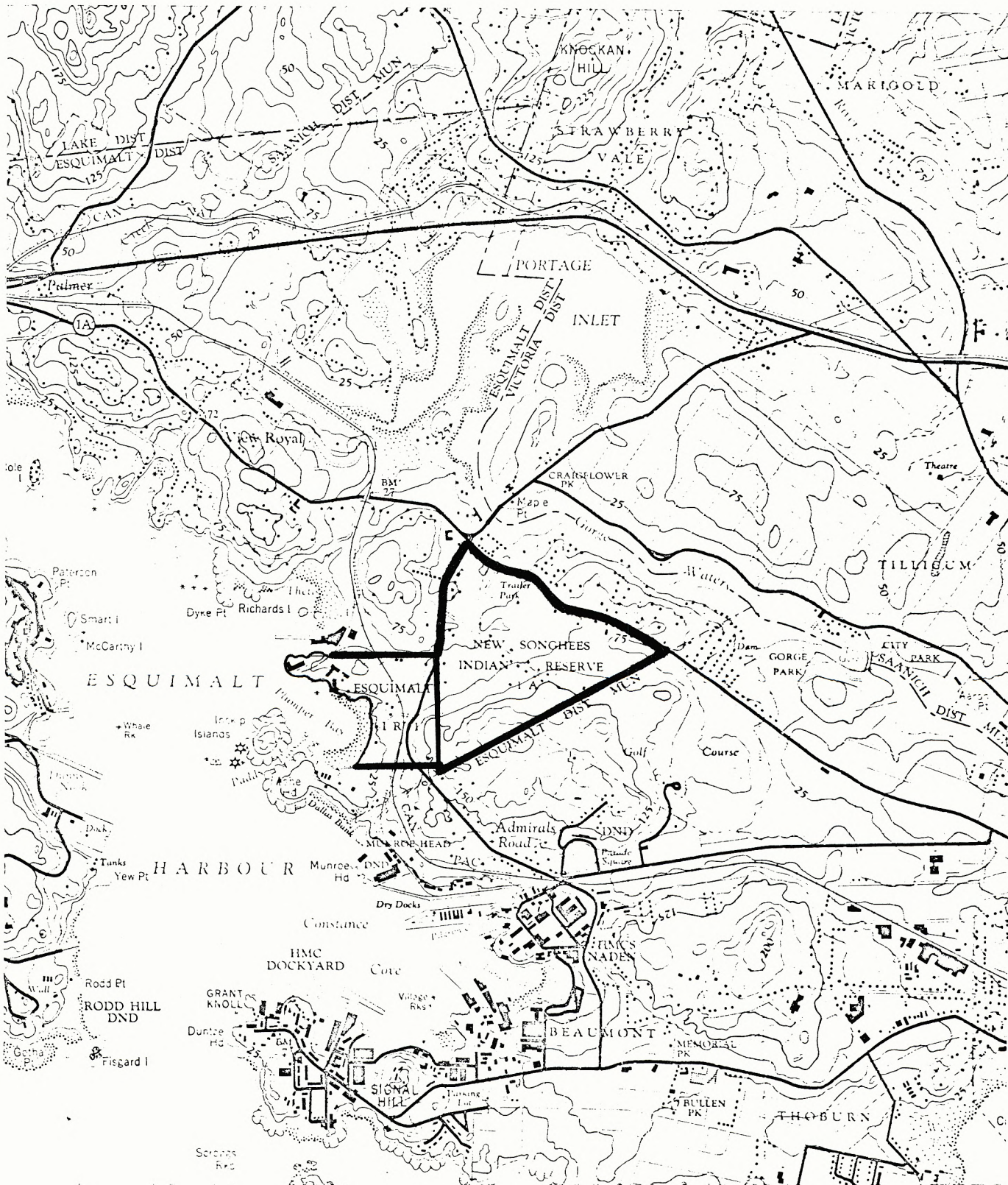
TWIN ISLAND NO. 10

Scale: 2½ inches = 1 mile



ESQUIMALT NO. 1
NEW SONGHEES NO. 1A

Scale: 2½ inches = 1 mile



traversed by a paved highway and the Canadian Pacific Railway line. The Band is presently entertaining applications for warehouse space.

SONGHEES BAND

Robert Williams and Associates studied the New Songhees Indian Reserve 1A in 1966 and recommended a residential complex with building sites, commercial area and park. The reserve is strategically located for such uses, in a geographical sense. However, it is exposed to the undesirable influences of commercial uses within Esquimalt Indian Reserve No. 1 lying adjacent to its west boundary. Further, it would be necessary to move several Indian homes before the plan could be activated. The portion of the reserve in the northern extremity is presently being leased for trailer park purposes. Reserves No. 3 and 4 on Discovery Island and Chatham Islands respectively are presently undeveloped but possess attractive recreational characteristics. Lying only a mile from Cadboro Point they are well positioned for attracting the weekend boaters from metropolitan Victoria.

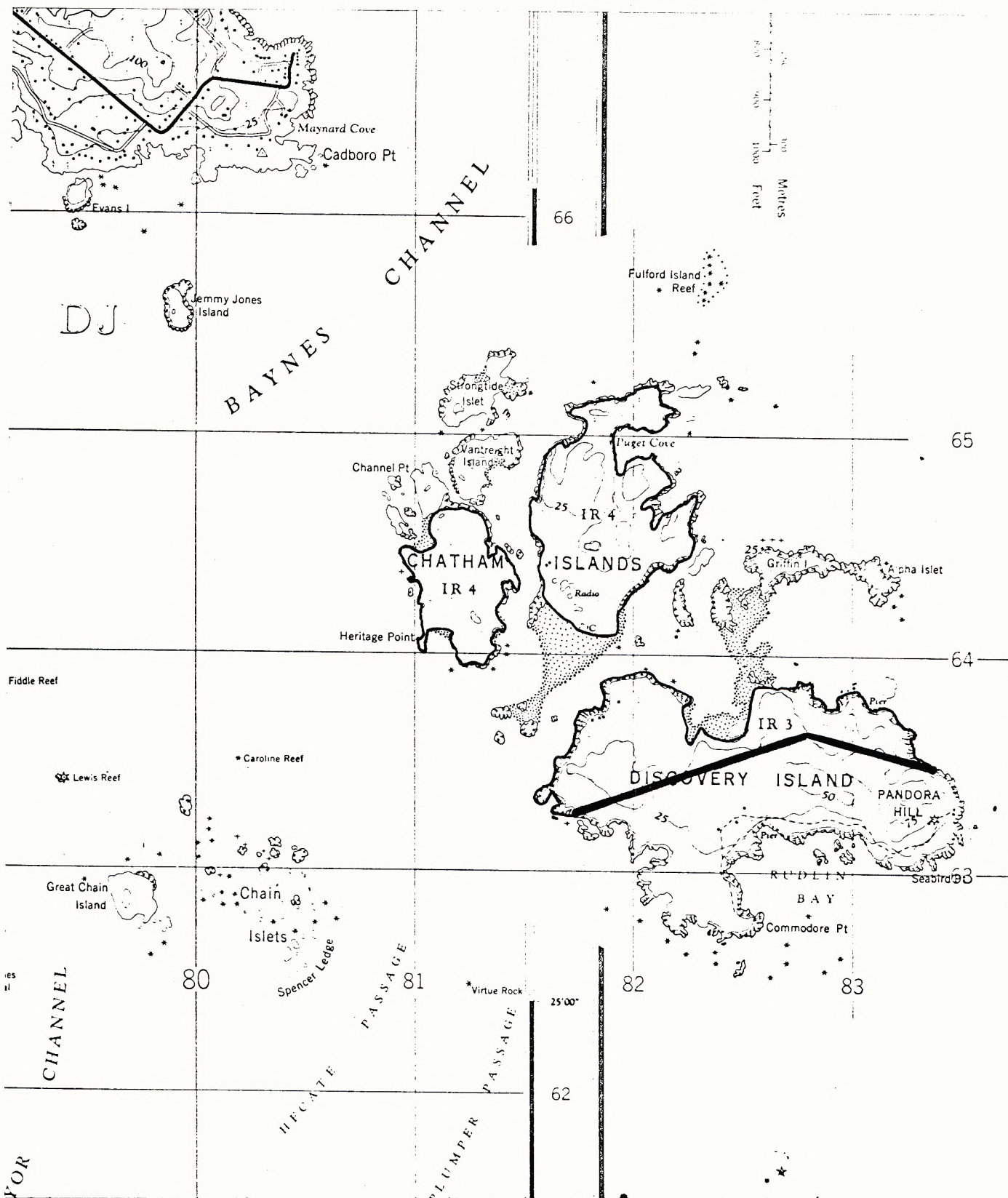


Development on Beecher Bay No. 1

DISCOVERY ISLAND NO. 3

CHATHAM ISLANDS NO. 4

Scale: 2½ inches = 1 mile



SOOKE BAND

Sooke Indian Reserve No. 1 is attractively situated on the seashore in Sooke Harbour. The location of the Indian residences within the reserve would interfere with any proposed development. Indian Reserve No. 2 is located also on the seashore and its potential for recreation or residential uses will become more apparent as populations increase.

TSAWOUT BAND

The development potential of East Saanich Indian Reserve No. 2 was examined in a report composed by P. S. Ross and Partners in 1968. They identified potentials for agriculture, residential, commercial, trailer camp and marina developments. A trailer camp and campgrounds has been constructed and the potential for successful development of the other uses is good. Indian Reserve No. 5 at Fulford Harbour on Salt Spring Island is undeveloped but possesses a good potential for a marine campsite.

TSEYCUM BAND

Union Bay No. 4 is attractively situated on the shores of Patricia Bay. The potential for development is good but the Band village is located thereon leaving little room for development.

PAUQUACHIN BAND

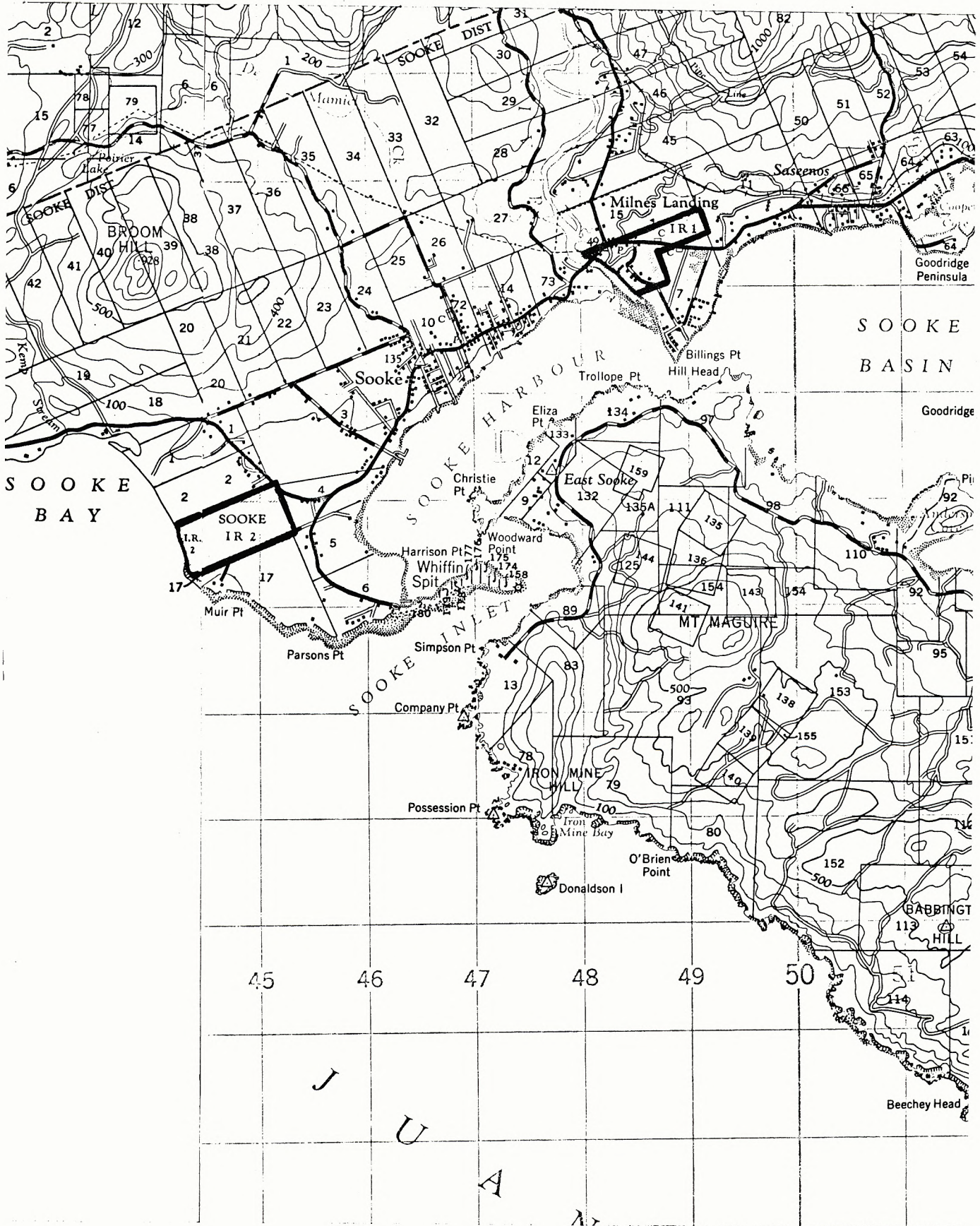
Cole Bay Indian Reserve No. 3 was studied by W. A. Kerr and Associates in 1966 and again in 1968 by the Capital Regional Planning Board. The latter report recommended that 125 acres be leased to the Capital Regional District for park purposes. It recommended further that the boundary be established around the existing building-stone quarry. Other development potentials identified include a campsite, a riding academy, selective logging and residential development. The reserve is strategically located within the growing community of North Saanich. Its potential for successful development is good.

TSARTLIP BAND

Mayne Island No. 6 contains 323 acres fronting on Active Pass. Active

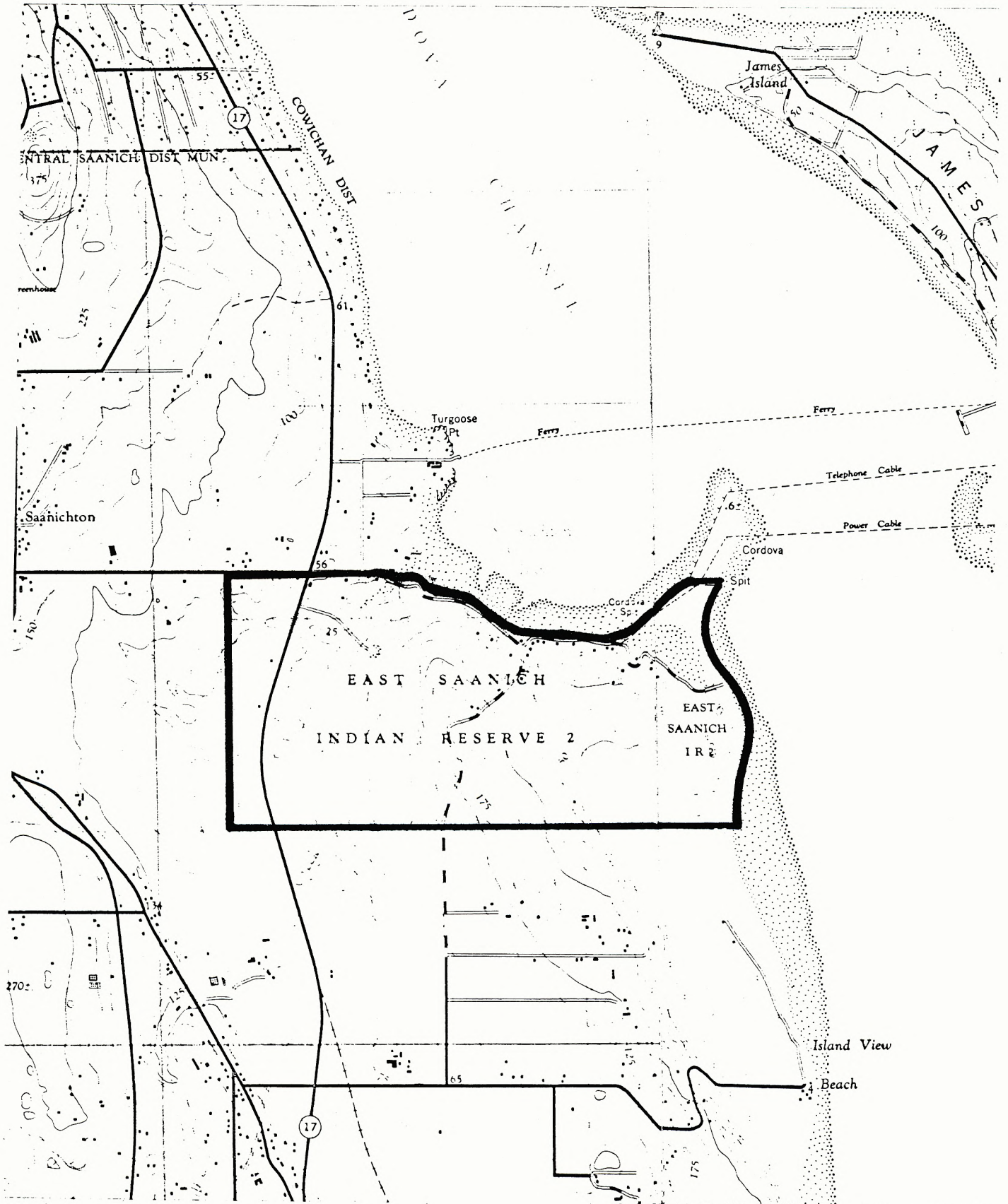
SOOKE NO. 1 & 2

Scale: 1 1/4 inch = 1 mile



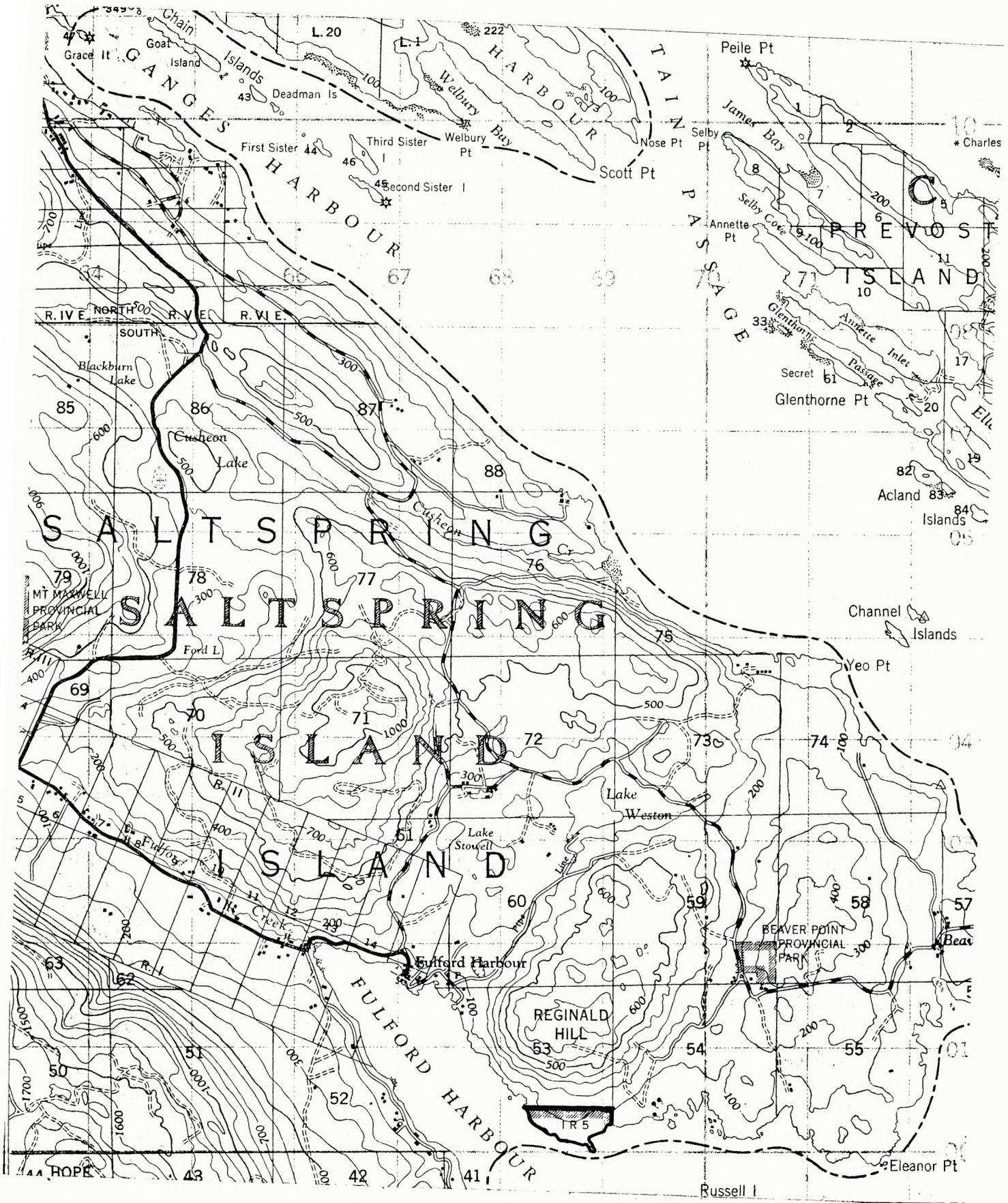
EAST SAANICH NO. 2

Scale: 2½ inches = 1 mile



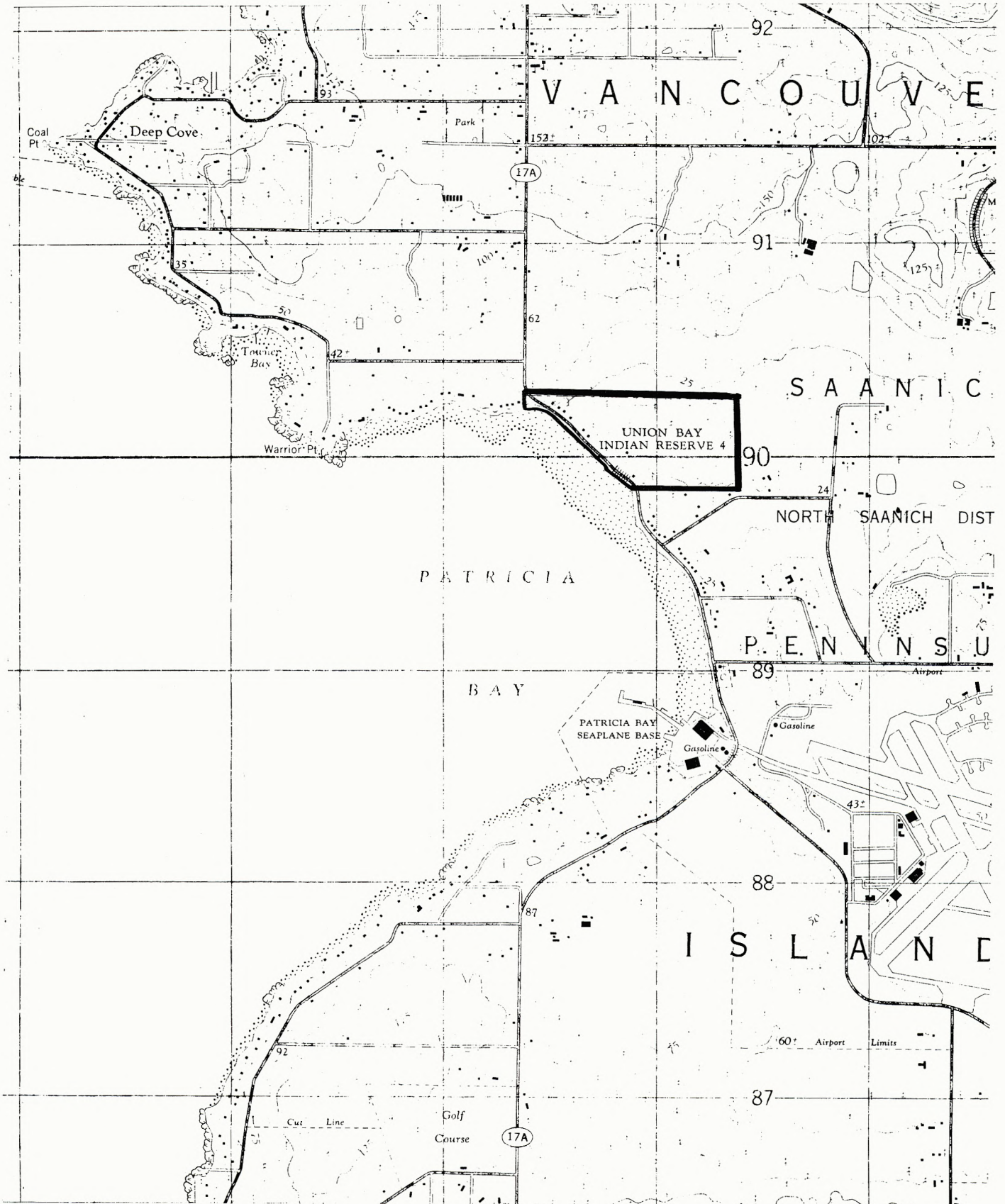
FULFORD HARBOUR NO. 5

Scale: 1 1/4 inch = 1 mile



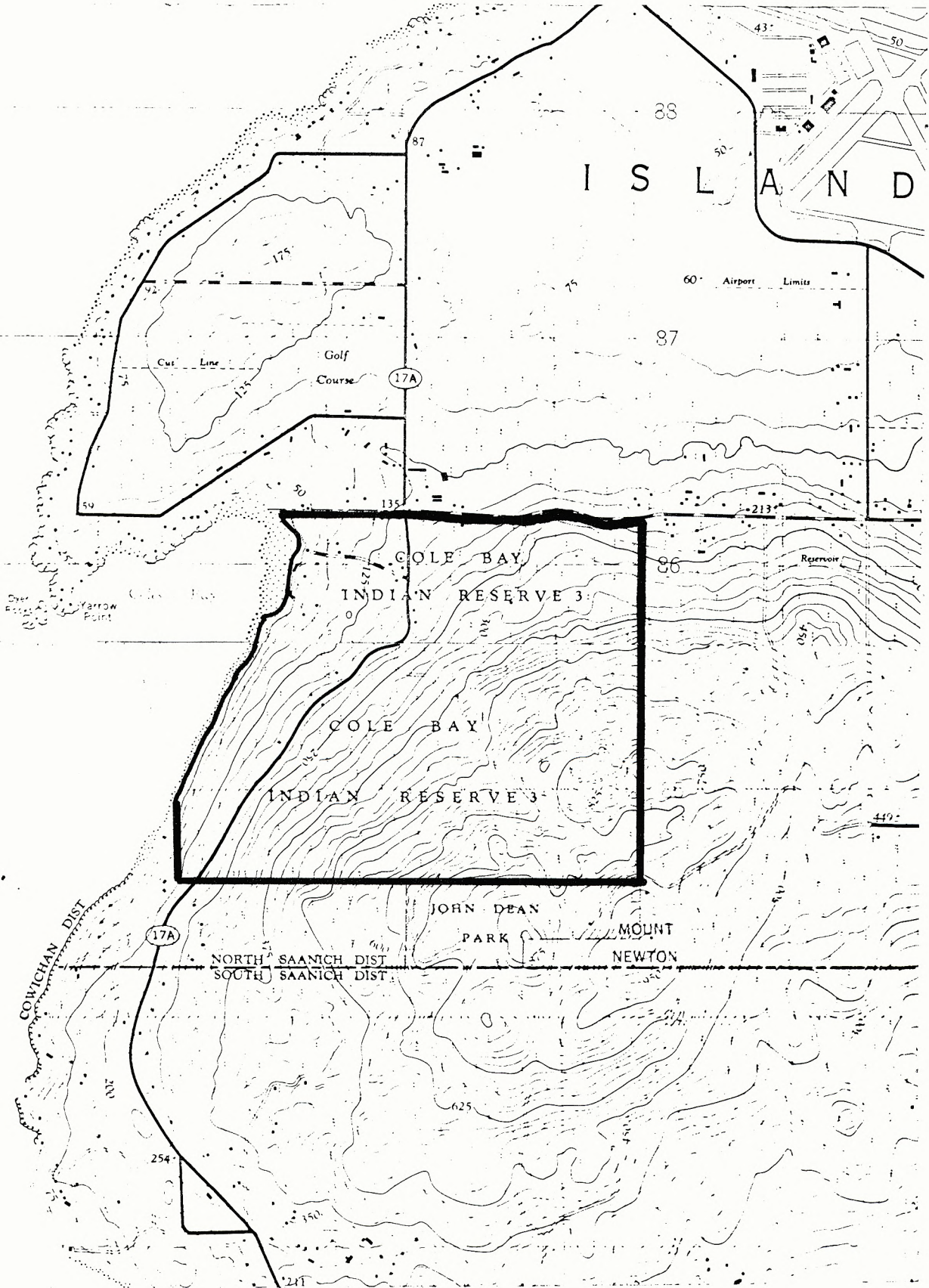
UNION BAY NO. 4

Scale: 2½ inches = 1 mile



COLE BAY NO. 3

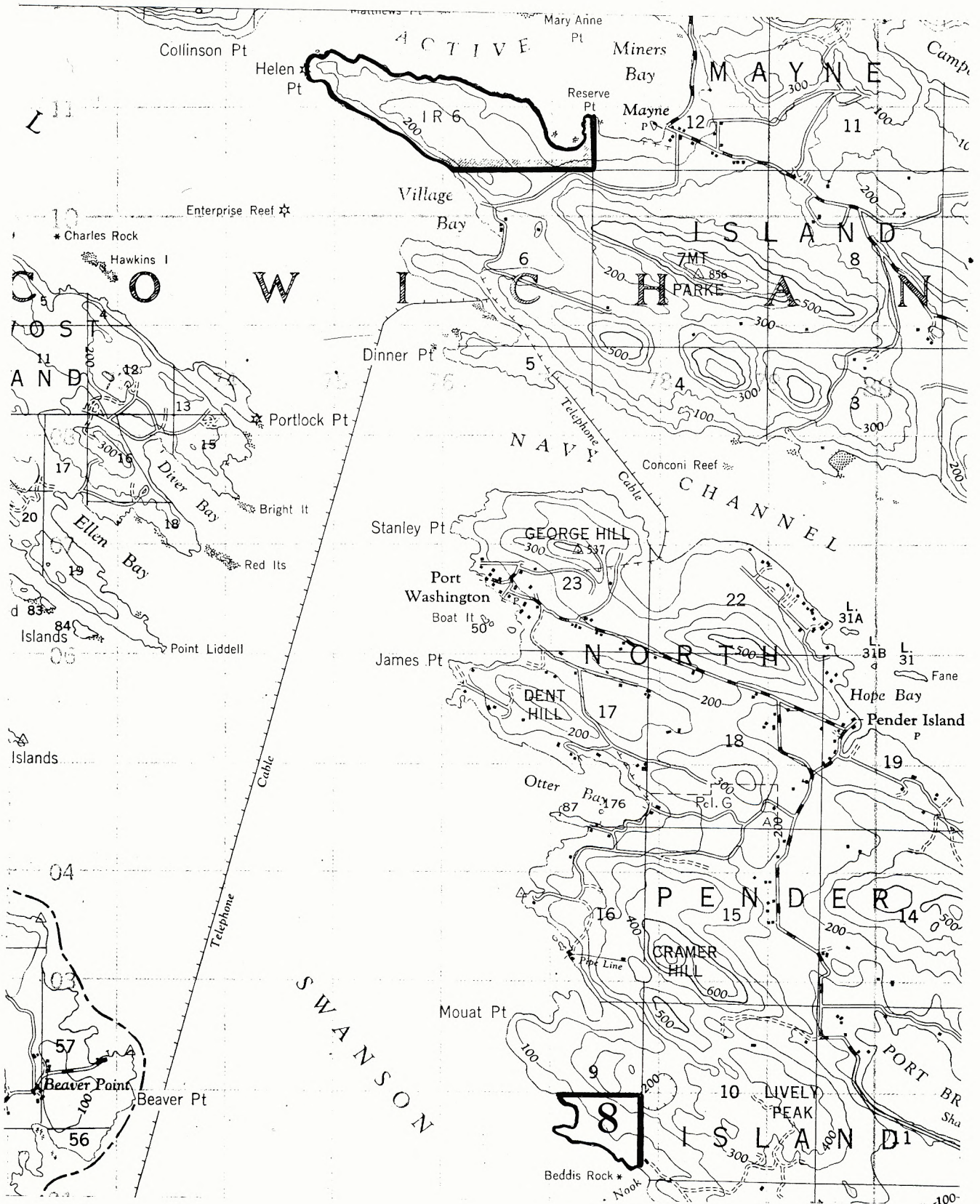
Scale: 2½ inches = 1 mile



PENDER ISLAND NO. 8

MAYNE ISLAND NO. 6

Scale: 1 1/4 inch = 1 mile



Pass is the route taken by ferries and most other vessels when travelling from Victoria to Vancouver. It is a heavily travelled water route and as such might cause I.R. 6 to be a "busy place". Whether or not this would be an advantage or disadvantage from a recreational viewpoint would depend on the likes and dislikes of potential users. Some people prefer a more secluded summer camp while others would enjoy the scene. At any rate, I.R. 6, with road access and also fronting on a busy marine passage way, has a good potential for recreational development. It is presently unused.

Senanus Island No. 10 is committed to lighthouse use. South Saanich No. 1 is the subject of a Regional Planning study. It possesses several interesting characteristics. The community of Brentwood, essentially a resort area, lies adjacent to its south boundary. It contains attractive sea frontage and most of its upland acreage is usable. The Band has developed a small campsite and a boat launching pad within the reserve. When the reserve was visited, on a Sunday afternoon in late November, 11 ramp users had parked their trailers adjacent to the pad and a Band member was in attendance. Members had hoped that their development would enjoy greater use and produce more income but the occupancy appears reasonable when considering that the development is fairly new. A more effective advertising campaign might increase occupancy. Evidently, there are restrictions regarding the posting of signs on the main highway to Swartz Bay ferry.

PENELAKUT BAND

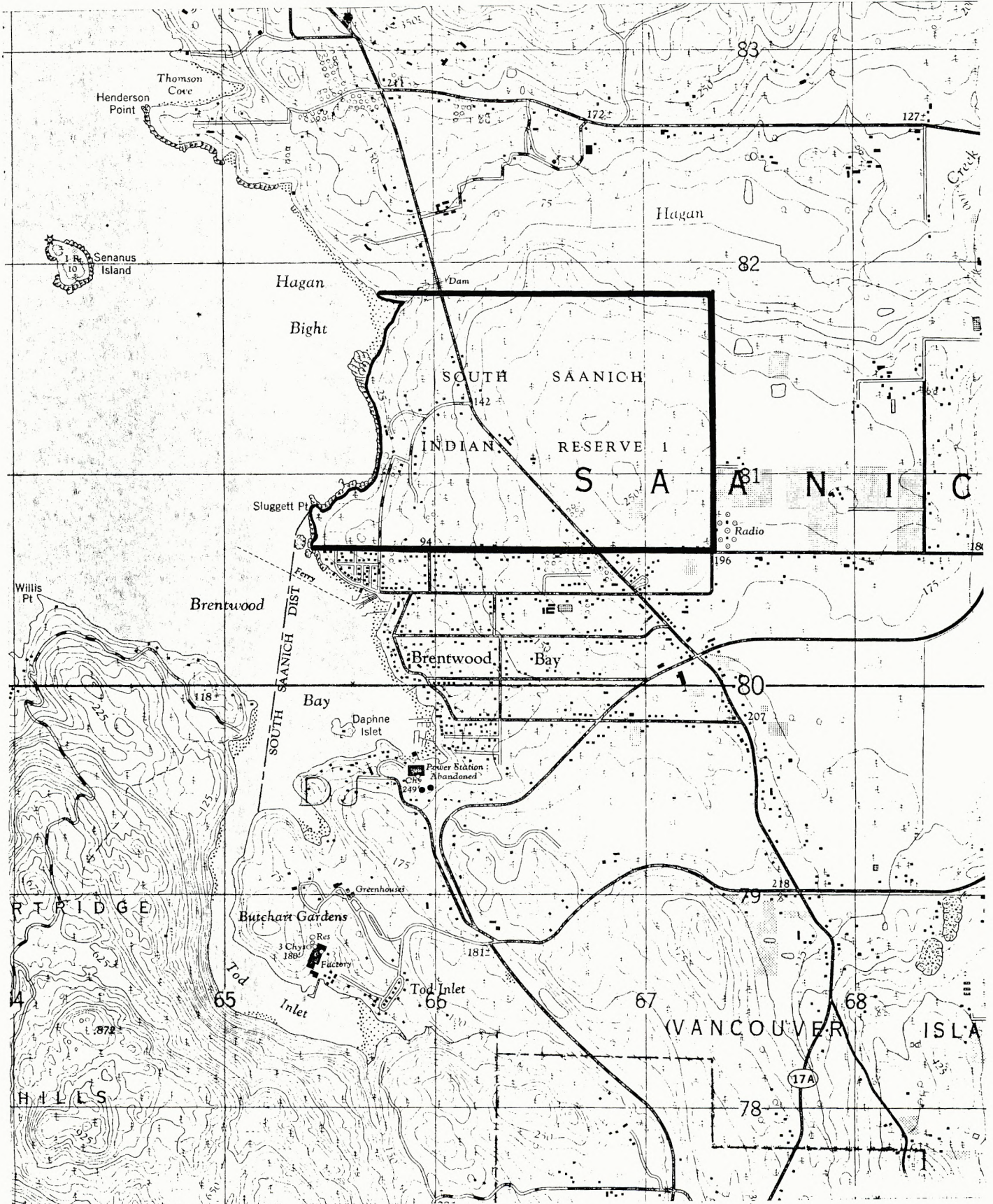
Although the Penelakut Band holds three reserves, only one is located within the Capital region. Galiano Island No. 9, located at the northern extremity of Galiano Island, presently supports a store and marine gas station. Like Mayne Island Reserve No. 6 it fronts on a fairly busy marine passage way and, therefore, is strategically located to attract water tourists.

RESERVES HELD IN COMMON OR JOINTLY

Saturna Island No. 7, held by the Tseycum and Tsawout Band, is located on a narrow neck of land at the eastern extremity of Saturna Island. It

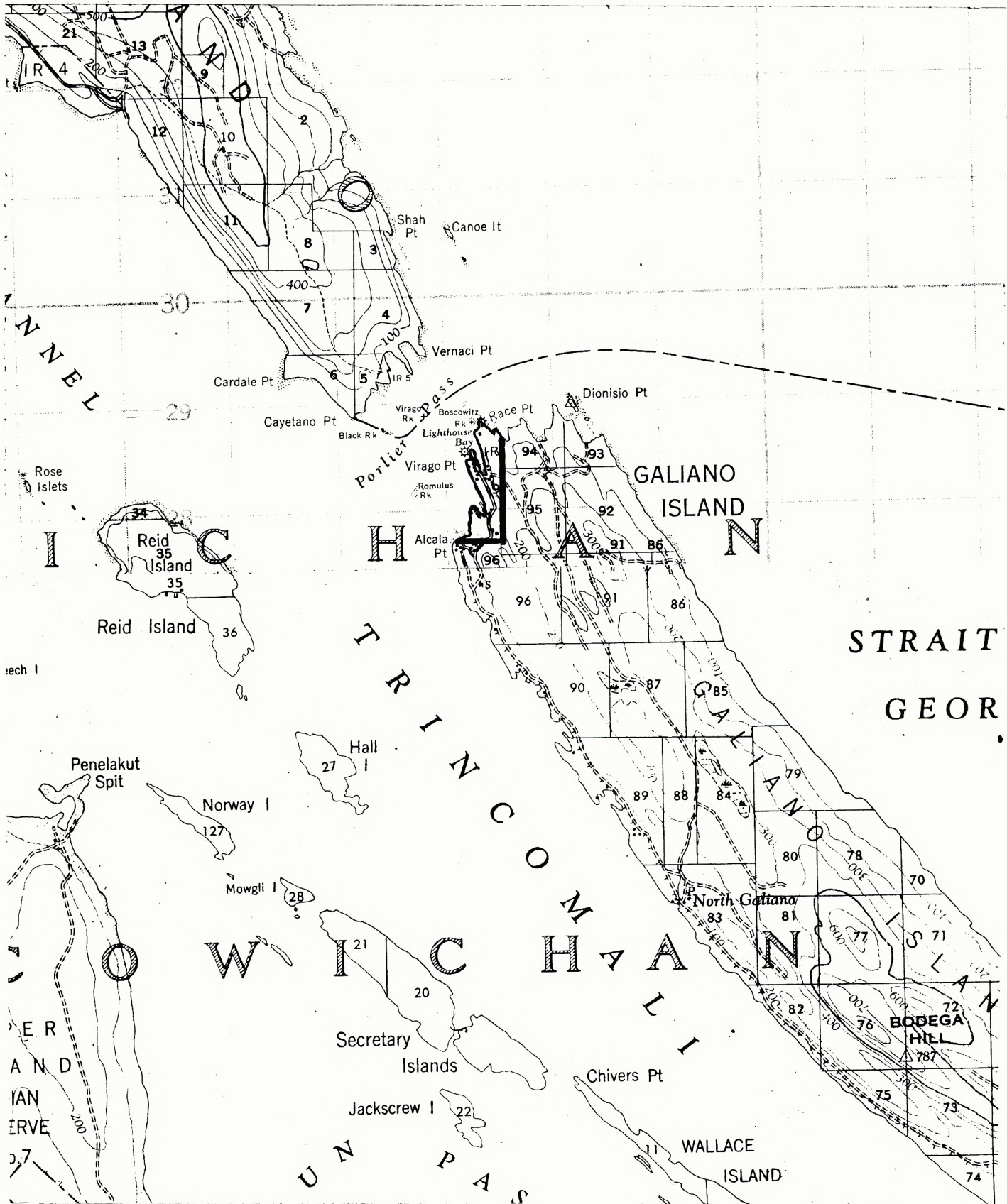
SOUTH SAANICH NO. 1

Scale: 2½ inches = 1 mile



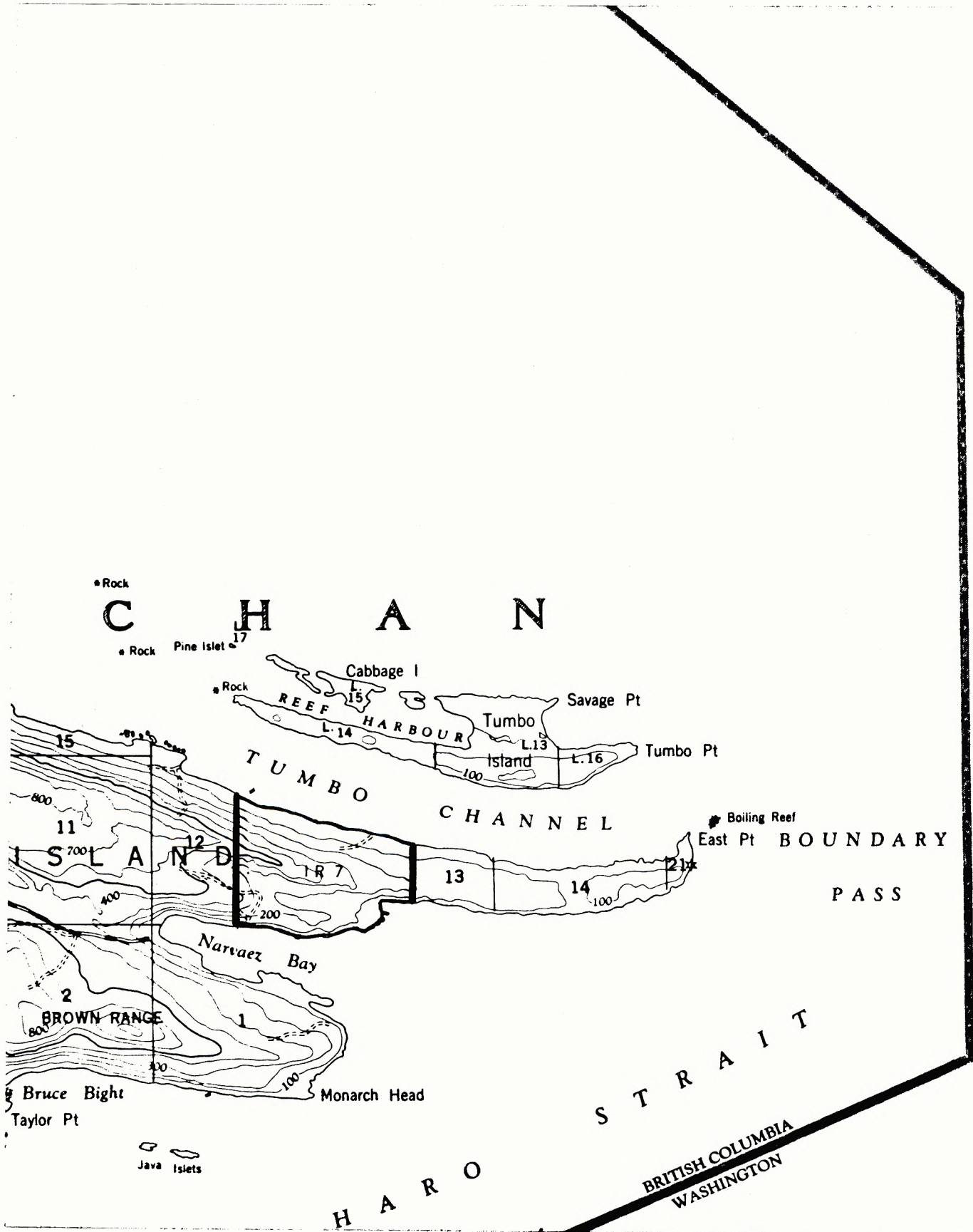
GALIANO NO. 9

Scale: 1 1/4 inch = 1 mile



SATURNA ISLAND NO. 7

Scale: 1 1/4 inch = 1 mile



contains sea frontage at both its north and south boundaries and, therefore, might have a good potential for summer homesites if a domestic water source can be secured.

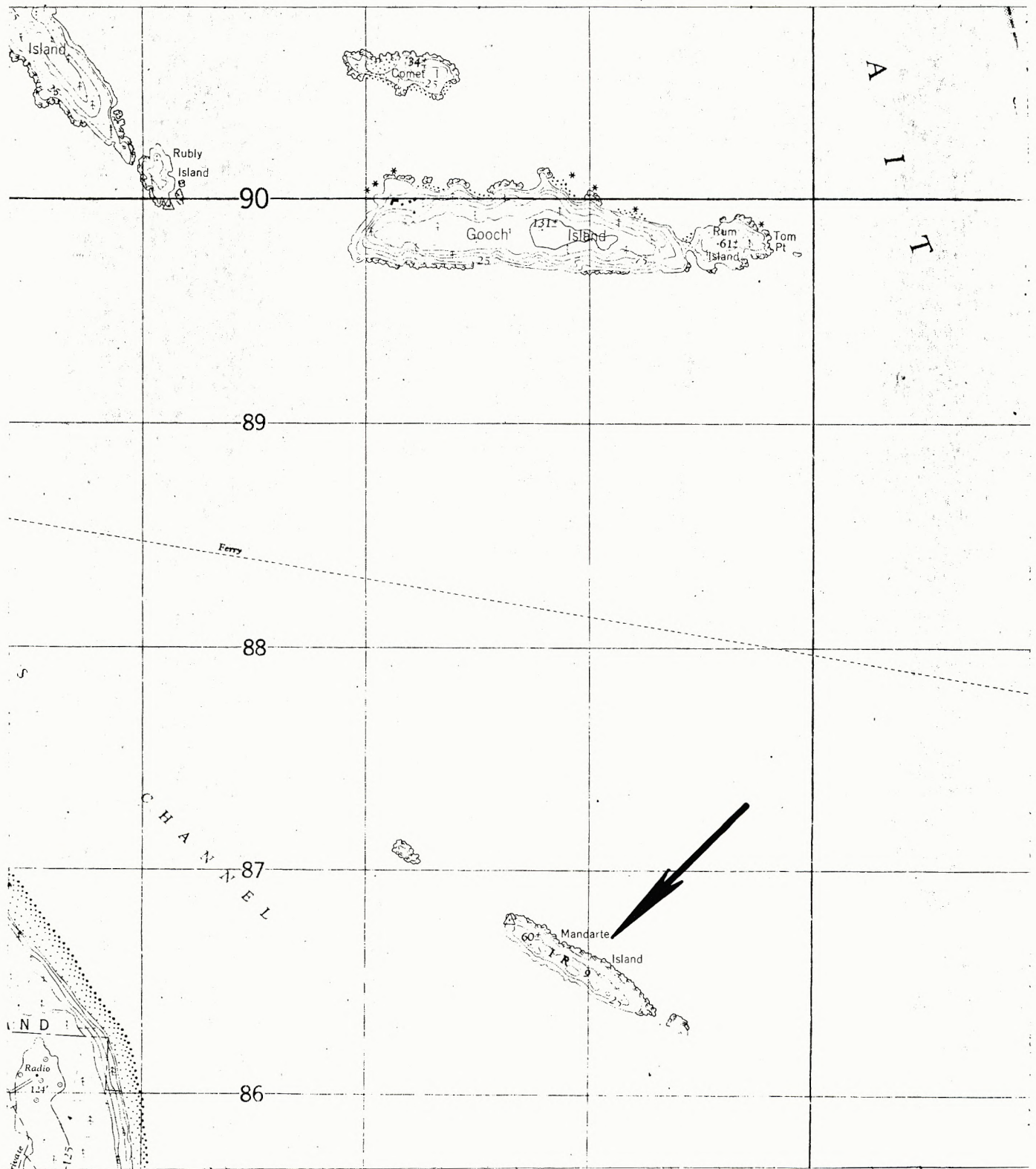
Pender Island No. 8 is not shown on any map published by the Provincial or Federal Governments. Its location, shape and size, as shown on the attached map might be in error since it was transposed from a rough sketch provided by the Indian Affairs Branch. It is held by both the Tseycum and Tsawout Bands.

Bare Island No. 9 also held by the Tseycum and Tsawout Bands is called Amdart Island on the Government maps. It is a 26 acre island located in relatively unprotected waters. Its use potential is, therefore, limited at the present time.

Goldstream No. 13 is held by the Tsartlip, Tsawout, Malahat and Pauquachin Bands. It contains 12 acres fronting on the tidal flats at the head of Finlayson Arm. Although its use potential appears limited at the present time, its location, on a good public road and only half a mile from the main island highway could favourably affect its use potential in the future. Further, it fronts on Goldstream River. The annual run of spawning salmon up the river attracts sightseers from metropolitan Victoria. Since it lies adjacent to Goldstream Provincial Park which contains 153 camping units, its potential for campsite development should be explored. However, with only 12 acres it might be difficult to design a development capable of being operated economically.

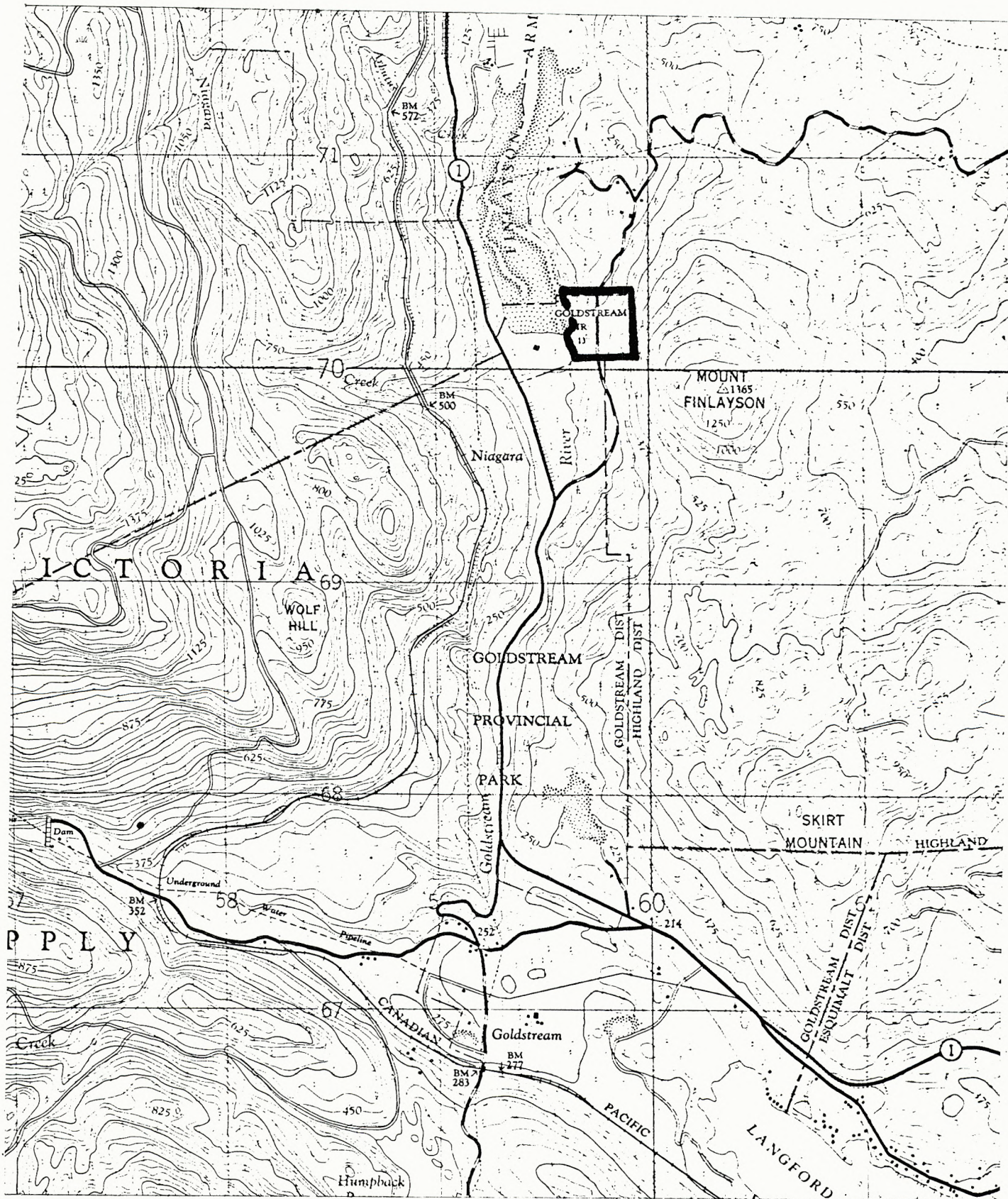
BARE ISLAND NO. 9

Scale: 2½ inches = 1 mile



GOLDSTREAM NO. 13

Scale: 2½ inches = 1 mile



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