



City of Williams Lake Economic Development Baseline Report

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Presented to:
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1 INTRODUCTION

1.1 PURPOSE

The City of Williams Lake is developing a 3 to 5-year Economic Development Strategy that will incorporate the changed dynamics of the area since the 2017 Wildfires. The City of Williams Lake has enjoyed a traditional resource-based economy that has relied on the mining and forestry industries. However, in recent years the forest industry has been facing challenges related to the Mountain Pine Beetle and the decline in the allowable annual cut (ACC) in the area.

This Economic Development Strategy is being undertaken to proactively diversify the local economy and position the City for sustainability and resiliency moving forward. In addition, the strategy will support the transition anticipated for the City and will capitalize on new opportunities and support the major industries in the area.

As part of the Economic Development Strategy process, this Baseline Report has been produced. This report is the first of two reports to be delivered as part of this project. The baseline, or current situation assessment, references demographic, labour force, sector and other economic information. It also provides an insight into the socio-economic trends underlying the Williams Lake and area over the past fifteen years.

1.2 METHODOLOGY

Data collection and literature review focused on documentation internal to the City of Williams Lake, consisting of current and past plans and studies, as well as external agencies, including Statistics Canada and BC Stats. The Baseline is designed to inform the City of and its partners in preparation for the second report, the Strategy itself.

1.3 REPORT STRUCTURE

There are five chapters in addition to the Introduction. **Chapter 2** presents comparative demographic data for the municipality and province, while **Chapter 3** examines the economic base. **Chapter 4** discusses sector profiles and trends, while **Chapter 5 undertakes** an internal assessment. **Chapter 6** provides a strengths, challenges and opportunities (SCO) analysis. Reference materials are noted in **Chapter 7**.

2 DEMOGRAPHY

2.1 POPULATION

Historical Change

Table 1 outlines the historical population for the City of Williams Lake and the surrounding Williams Lake Area¹ and compares this to the Cariboo Regional District and British Columbia for the period between 2001 and 2016. Over the past 15-year period, the population in the area has generally trended down but appears to have stabilized over the past five years. The City's largest recorded population in recent years was in 2001 at 11,153 while the lowest population was in 2006 when it fell to 10,744.

Table 1: Population and Population Change, 2001 to 2016 (2001=100%)

	City of Williams Lake (Number)	Williams Lake Area	City of Williams Lake (Percentage)	Williams Lake Area	Cariboo	BC
2001	11,153	19,770	100%	100%	100%	100%
2006	10,744	18,760	96%	95%	95%	96%
2011	10,832	18,490	97%	94%	95%	97%
2016	10,753	18,275	96%	92%	94%	96%

Source: Statistics Canada (1996) (2001) (2007) (2012) (2017a)

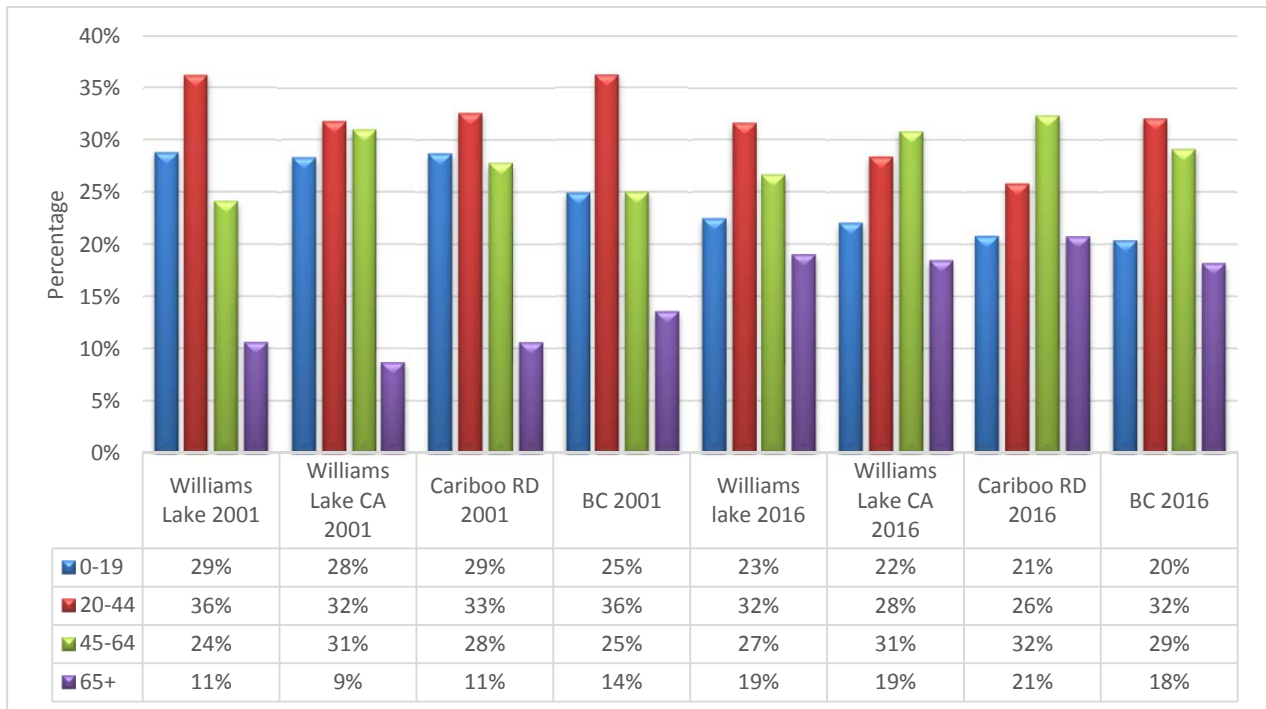
Age Characteristics

In the City of Williams Lake and the surrounding Williams Lake Area, age characteristics have changed noticeably over the past fifteen years. As illustrated in Figure 1, the population under the age of 19 years has declined from 29% in 2001 to 23% in 2016 in the City of Williams Lake. Meanwhile the City's working population, ages 20 to 64 years, has declined slightly, moving from 60% in 2001 to 59% in 2016.

In addition, the population 65 years and over has increased significantly, growing in share from 11% in 2001 to 19% in 2016; this is now higher than the provincial level where 18% of BC residents were 65 years of age or older in 2016.

¹ The Williams Lake Area includes the City of Williams Lake, Cariboo Regional District Electoral Areas D, E, F and K and surrounding First Nation communities.

Figure 1: Age Characteristics 2001 and 2016



Source: Statistics Canada (2001) (2017a)

Median Age

The shift towards an older demographic is further illustrated by the median age over time.

Table 2 outlines the change in median age between 2001 and 2016. Over the period the median age has risen in the City of Williams Lake from 35.2 years to 41.4 years while the Williams Lake Census Agglomeration (CA) has increased from 36.5 years in 2001 to 43.0 years in 2016.

Table 2: Median Age In Years, 2001 to 2016

	2001	2006	2011	2016
City of Williams lake	35.2 years	38.4 years	39.7 years	41.4 years
Williams Lake CA	36.5 years	39.2 years	41.2 years	43.0 years
Cariboo Regional District	38.0 years	42.4 years	45.1 years	47.4 years
British Columbia	38.4 years	40.8 years	41.9 years	43.0 years

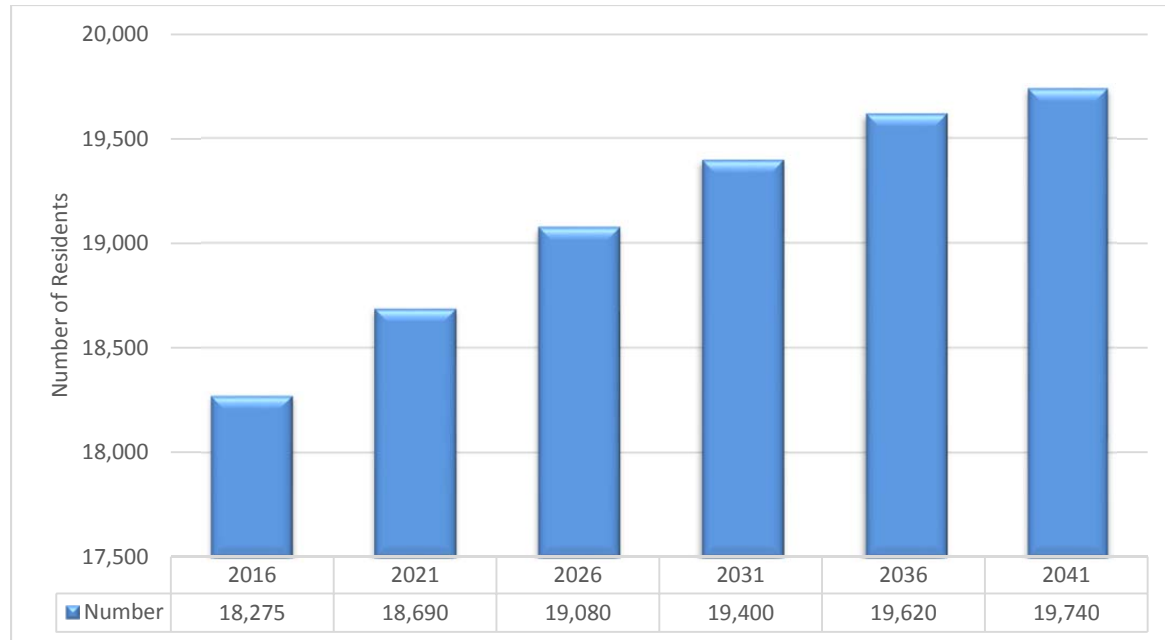
Source: Statistics Canada (2001) (2007) (2012) (2017a)

Note: Williams Lake CA includes the City of Williams Lake, Cariboo Regional District Electoral D and E and surrounding First Nation communities.

Population Projections

Figure 2 outlines the projected change in population in the Williams Lake Area ² between 2016 and 2041. Overall, the Williams Lake Area is anticipated to add a further 1,465 residents between 2016 and 2041. This is a modest change in population growth considering it will take place over the next 25 years but highlights a reversal in population declines experienced in the past 15 years.

Figure 2: Williams Lake Area Population Projections, 2011 to 2041

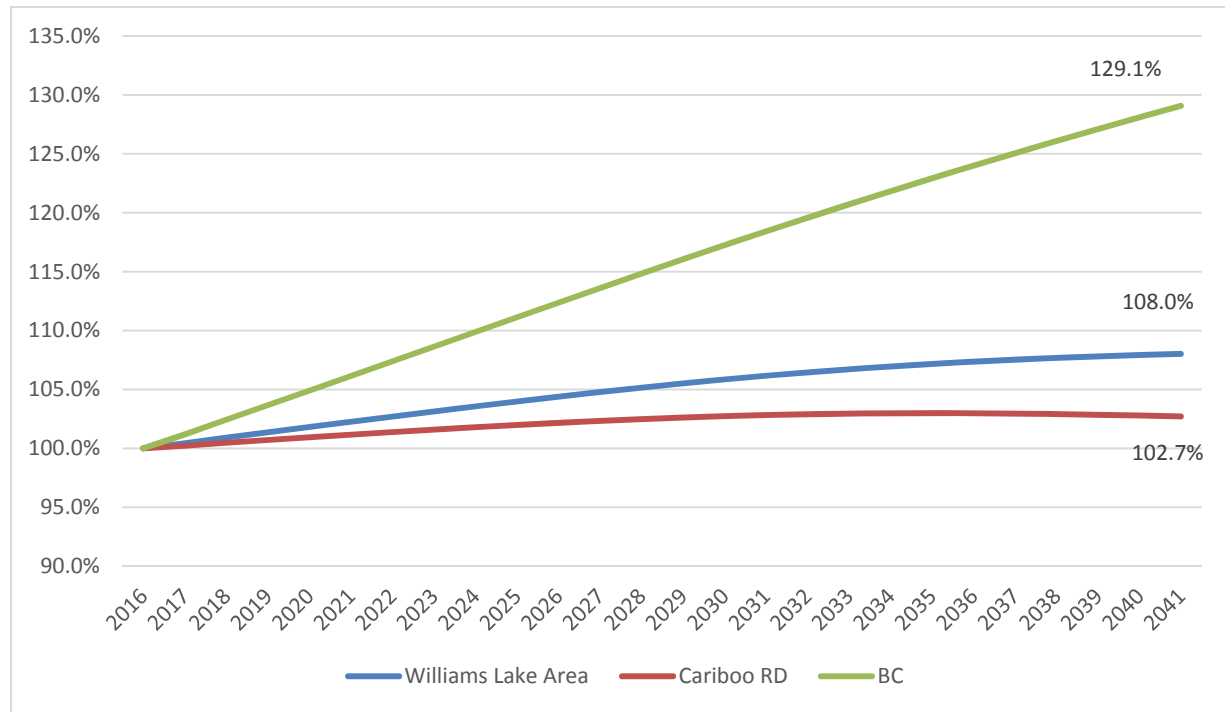


Source: Statistics Canada (2017a); BC Stats (2018a)

Figure 3 presents the percentage population change for the Williams Lake Area, the Cariboo Regional District and British Columbia for the period from 2016 to 2041. Compared to the Regional District, the Williams Lake Area is anticipated to have much more robust population growth. However, the Williams Lake Area will lag the provincial growth rate by a considerable margin.

² The Williams Lake Area includes the City of Williams Lake, Cariboo Regional District Electoral Areas D, E, F and K and surrounding First Nation communities.

Figure 3 Williams Lake Area, Cariboo Regional District and British Columbia Percentage Change in Population, 2016 to 2041, (2016=100%)



Source: BC Stats (2018a)

2.2 SCHOOL ENROLMENT

As illustrated in Table 3, over the past two years there has been a noticeable increase in student enrollment in the kindergarten to grade 12 in the schools in and around Williams Lake. This follows previous years of declining student enrollment. Anecdotal reports suggest that the growth is primarily due to:

- New families moving to the area versus student population growth from existing local families (with attractive housing prices/life style affordability being a key driver).
- Families moving back to Williams Lake to be with other members of their families.

Table 3: Williams Lake and Area School Enrolment, 2013 to 2018

Year	2013	2014	2015	2016	2017	2018
Students	3,446	3,317	3,282	3,276	3,290	3,354
Percent Change	100.0%	96.3%	95.2%	95.1%	95.5%	97.3%

Source: Wintjes, 2018 pers comm.

2.3 EDUCATION ATTAINMENT

Table 4 outlines the educational attainment for residents of the City of Williams Lake and the Williams Lake Area in 2016 and compares the share percentages by educational category with the Cariboo Regional District and British Columbia. The educational attainment is based on the highest certificate, diploma or degree, for residents aged 15 years and over.

As illustrated, the City of Williams Lake, wider Williams Lake Area, and Regional District all have a significantly higher percentage of residents who have not graduated from high school when compared to the provincial average. In addition, the share of residents with university certificates, diploma or degree at a bachelor level in the City and Williams Lake Area, and Regional District is well below the rate seen at the provincial level. This is not uncommon in rural British Columbia and is countered by a higher share of population in the trades, as is the case locally.

Table 4: Educational Attainment, 2016

	City of Williams Lake	Williams Lake Area	City of Williams Lake	Williams Lake Area	Cariboo RD	BC
	(Number)		(Percentage)			
No certificate; diploma or degree	2,135	4,460	25.0%	23.4%	25.8%	15.5%
Secondary (high) school diploma or equivalency certificate	2,955	6,340	34.7%	33.3%	32.4%	29.4%
Trades certificate or diploma	410	1,035	4.8%	5.4%	5.2%	3.7%
Certificate of Apprenticeship or Certificate of Qualification	500	1,485	5.9%	7.8%	7.8%	5.1%
College; CEGEP or other non-university certificate or diploma	1,300	2,965	15.2%	15.6%	16.3%	18.1%
University certificate or diploma below bachelor level	295	705	3.5%	3.7%	3.1%	3.6%
University certificate; diploma or degree at bachelor level or above	930	2,055	10.9%	10.8%	9.4%	24.6%
Total – Highest Certificate	8,525	19,045	100%	100.0%	100.0%	100.0%

Source: Statistics Canada(2017a)

2.4 INCOME

Median Individual Personal Incomes

As outlined in Table 5, the median personal income for men in the City of Williams Lake was noticeably above the provincial level in 2015. However, over the past 20 years, men in the City of Williams Lake have only seen personal income rise by 34%. This has lagged the increase seen at the provincial level where personal income for males has risen by 53% over the same period.

Conversely, for women in the City of Williams Lake, personal income lagged personal income at the provincial level by approximately \$1,250 in 2015. However, women in the City of Williams Lake have been experiencing increases in personal income at a similar rate as experienced at the provincial level for women.

Table 5: Median Personal Income, 1995 and 2015

	1995	2005	2015	Percent Change
City of Williams lake				
Male	\$35,185	\$42,340	\$47,180	134%
Female	\$14,015	\$17,980	\$26,295	188%
Total	\$19,150	\$25,950	\$ 34,095	178%
Cariboo Regional District				
Male	\$28,620	\$32,375	\$41,670	146%
Female	\$12,305	\$20,460	\$23,370	190%
Total	\$18,155	\$24,385	\$30,495	168%
British Columbia				
Male	\$26,425	\$35,625	\$40,370	153%
Female	\$15,230	\$16,685	\$27,545	181%
Total	\$19,980	\$25,725	\$33,015	165%

Source: Statistics Canada (1996) (2013) (2017a)

Personal Income by Source

Table 6 provides a closer look at personal income sources for 2015 in the City of Williams Lake, the Williams Lake Area and British Columbia. For the City of Williams Lake, most residents have personal incomes of between \$10,000 and \$39,999 which makes up the largest share of individual personal income with 3,655 residents or 44% of residents with personal income in this personal income range. This is a slightly higher share than seen at the provincial level which has 41% of residents with personal income in this same category.

A further 860 residents in the City of Williams Lake have income of \$90,000 or more, making up 10% of the total persons with personal income, a share that is slightly below the provincial share of 11%. Also, among the 860 residents with income of \$90,000 or more, there are 110 individuals with personal income of \$150,000 or greater.

Table 6: Detailed Personal Income By Category for those Aged 15 and Over, 2015

	City of Williams Lk	Williams Lake Area	City of Williams Lk	Williams Lake Area	Cariboo RD	British Columbia
	(Number)		(Percentage)			
Total	8,525	18,945	100%	100%	100%	100%
Without total income	230	600	3%	3%	4%	4%
With total income	8,295	18,345	97%	97%	96%	96%
Under \$10,000 (incl. loss)	1,105	2,600	13%	14%	15%	15%
\$10,000 to \$19,999	1,420	3,075	18%	16%	18%	17%
\$20,000 to \$29,999	1,230	2,590	14%	14%	15%	13%
\$30,000 to \$39,999	1,005	2,140	12%	11%	11%	11%
\$40,000 to \$49,999	735	1,620	9%	9%	8%	9%
\$50,000 to \$59,999	600	1,335	7%	7%	6%	7%
\$60,000 to \$69,999	570	1,230	7%	6%	6%	6%
\$70,000 to \$79,999	430	1,000	5%	5%	5%	4%
\$80,000 to \$89,999	340	750	4%	4%	4%	3%
\$90,000 to \$99,999	250	590	3%	3%	3%	3%
\$100,000 and over	610	1,415	7%	7%	6%	8%
\$100,000 to \$149,999	500	1,170				
\$150,000 and over	110	250				

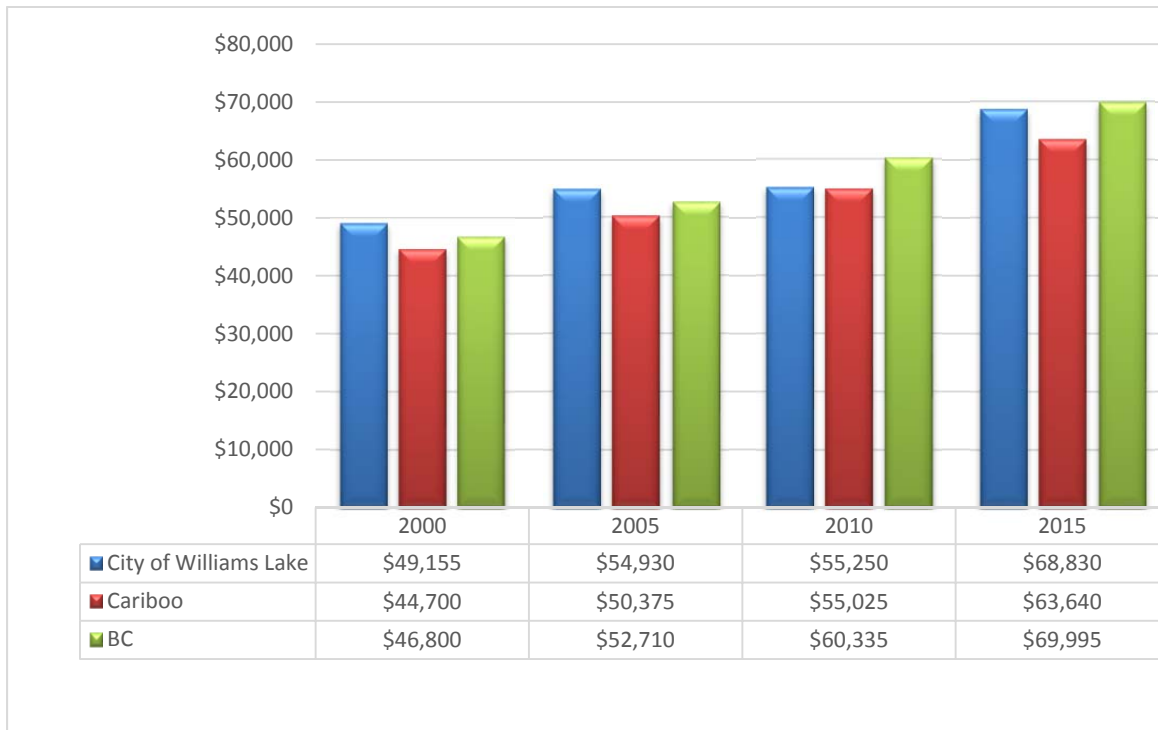
Source: Statistics Canada (2017b)

Median Household Incomes

Figure 4 outlines the median household incomes for the City of Williams Lake, Cariboo Regional District, and British Columbia for the period between 2000 and 2015. In 2000, median household income in the City of Williams Lake stood at \$49,155, or 5% above the provincial median household income of \$46,800. Unfortunately, between 2005 and 2015, household incomes in the City of Williams Lake have not kept pace with the rate of increase observed at the provincial level. While median household incomes in the City of Williams Lake have increased to \$68,830, they now lag the median income at the provincial level by almost 2%.

Over the entire period, median household incomes in the City of Williams Lake have been higher than those observed in the larger Cariboo Regional District. In 2015, the City of Williams Lake had a median household income that was over 8% above the Regional District.

Figure 4: Median Household Income, 2000 -2015

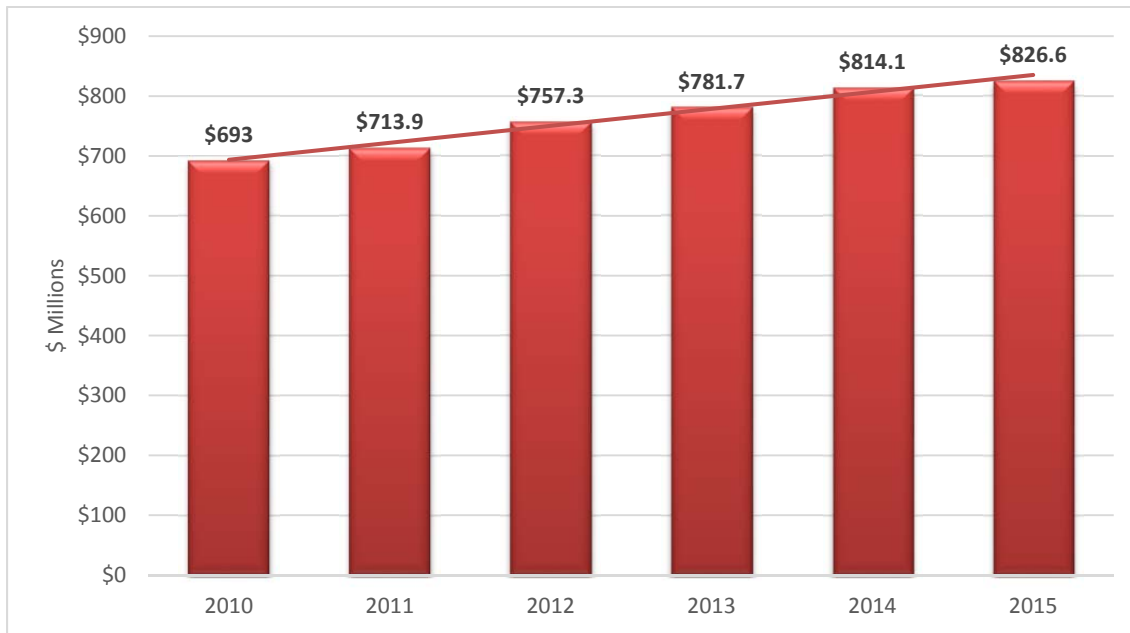


Source: Statistics Canada (2001) (2007) (2013) (2017a)

Total Personal Income

Total personal income in the Williams Lake Area has grown noticeably since the economic downturn in 2009. As outlined in Figure 5, personal income has increased from \$693.0 million in 2010, and has risen each year to \$826.6 million in 2015. Overall, the personal income in the Williams Lake Area has seen growth of 19.3% over the 2010 to 2015 period. This is only slightly behind the overall provincial total personal income increase of 25.8% over the same period.

Figure 5: Williams Lake Area Total Personal Income, 2010-2015



Source: Government of Canada (2018)

2.5 HOUSING

Private Households by Age of Primary Household Maintainer

The first person in the household identified as someone who pays the rent or the mortgage, or the taxes, or the electricity bill, and so on, for the dwelling is considered the maintainer. In the case of a household where two or more people are listed as maintainers, the first person listed is chosen as the primary household maintainer.³

Table 7 outlines the private households by age of primary household maintainer in 2016. As highlighted, a larger share of the population under 25 of years age (6.1% of total) in Williams Lake are listed as the primary household maintainers than generally seen in the provincial level (3.1% of total). This suggests that younger families in Williams Lake are likely to be living on their own in their own residents than generally seen in the province.

³ The order of the persons in a household is determined by the order in which the respondent lists the persons on the questionnaire. Generally, an adult is listed first followed, if applicable, by that person's spouse or common-law partner and by their children. The order does not necessarily correspond to the proportion of household payments made by the person.

Table 7: Private Households By Age of Primary Household Maintainer, 2016

	City of Williams Lk	Williams Lk Area	Cariboo RD	British Columbia
15 to 24 years	275	375	830	58,620
25 to 34 years	615	1,185	2,900	253,950
35 to 44 years	770	15,15	3,590	304,185
45 to 54 years	770	18,40	5,050	378,545
55 to 64 years	915	22,55	6,255	390,185
65 to 74 years	660	15,80	5,015	288,165
75 to 84 years	395	795	2,480	152,225
85 years and over	105	225	575	56,085
Total	4,505	9,770	26,700	1,881,970

Source: Statistics Canada (2017a)

Owner Households Shelter Costs and Dwelling Values

Table 8 provides an overview of the share of households in non-farm, private dwellings with mortgages and share spending 30% or more of total income on shelter costs. As illustrated, 55.5% of owner households have mortgages, only slightly below the provincial average of 58.6%. However, only 7.9% in the City of Williams Lake are spending 30% or more of total income on shelter costs, a share below the 20.7% level observed at the provincial level.

Table 8: Household Share with Mortgages and Owners Spending 30% or More on Shelter, 2016

	City of Williams Lk	Cariboo RD	British Columbia
Total Owned Homes	4,495	25,025	1,832,420
% of owner households with a mortgage	55.5%	51.4%	58.6%
% of owner households spending 30% or more of income on shelter costs	7.9%	9.8%	20.7%

Source: Statistics Canada (2017a)

Tenant Households Subsidized Housing and Shelter Costs

Table 9 outlines tenant households in subsidized housing and their shelter costs for the City of Williams Lake, Cariboo Regional District, and British Columbia. As illustrated, 15.6% of tenant housing in Williams Lake is in the form of subsidized housing, compared to 12.5% in British Columbia. Overall, 35.4% of tenant households spend 30% or more of their income on shelter costs, compared to 43.3% at the provincial level. This is despite the lower overall median rental rate in Williams Lake than at the provincial level in 2016.

Table 9: Tenant Household in Subsidized Housing and Shelter Costs, 2016

	City of Williams Lk	Cariboo RD	British Columbia
% of tenant households in subsidized housing	15.6%	12.4%	12.5%
% spending 30% or more of income on shelter costs	35.4%	35.4%	43.3%
Median monthly shelter costs for rented dwellings (\$)	\$812	\$751	\$1,036
Avg monthly shelter costs for rented dwellings (\$)	\$856	\$782	\$1,149

Source: Statistics Canada (2017a)

Home Affordability

Table 10 outlines the home affordability for communities across British Columbia as of July 2018. As illustrated, Williams Lake is among the most affordable housing markets in the province. In Williams Lake it takes a one-person household who is earning the local median income approximately 8.5 times their income to purchase a single-family home and only 3.5 times the median income of two-person household to do the same.

This is better than neighbouring regional centres of Prince George and Kamloops, and significantly better than the affordability observed in the Lower Mainland.

Table 10: Home Affordability for Select Communities, as of July 2018

Ranking	1 Person Households			2+ Person Households	
	Average Home Price	Price to Income	Median Income	Price to Income	Median Income
Quesnel	\$219,530	7.8	\$28,224	2.6	\$84,275
Williams Lake	\$298,827	8.5	\$35,090	3.5	\$86,033
Prince George	\$347,470	9.1	\$38,023	3.7	\$94,687
Kamloops	\$406,768	11.6	\$35,004	4.4	\$92,326
100 Mile	\$330,875	11.3	\$29,353	5.4	\$61,568
Campbell River	\$457,301	13.9	\$32,845	5.7	\$80,539
Penticton	\$439,957	15.1	\$29,090	5.9	\$74,071
Victoria	\$613,435	17.4	\$35,229	7.9	\$77,608
Nanaimo	\$565,388	17.5	\$32,248	7.2	\$78,965
Abbotsford	\$650,000	19.8	\$32,863	7.4	\$87,866
Coquitlam	\$980,400	25.5	\$38,505	10.8	\$90,892
Richmond	\$1,033,600	30.8	\$33,578	13.2	\$78,549
Vancouver	\$1,229,400	32.0	\$38,449	13.8	\$89,207

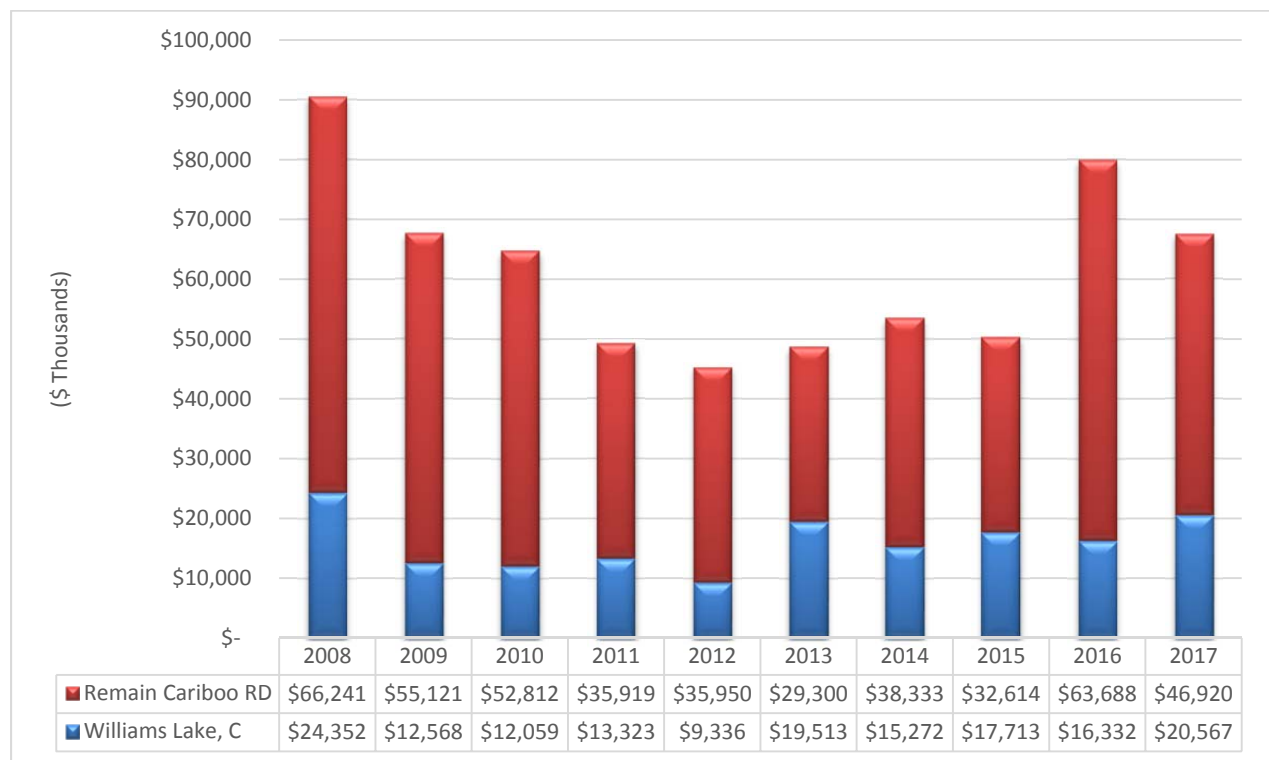
Source: Zoocasa (2018), BCNREB (2018), Statistics Canada (2017a)

2.6 BUILDING PERMITS

Total Building Permit Values

Figure 6 outlines the total building permits for the City of Williams Lake and the remainder of the Cariboo Regional District between 2008 and 2017. As illustrated, total building permits declined noticeably during the recession starting in 2008. However, after a period of decline, total building permit values had a noticeable uptick in 2016. This was followed by the 2017 wildfires which set back construction in 2017.

Figure 6: Building Permit Values for City of Williams Lake and Cariboo Regional District, 2008 to 2017 (\$ thousands)



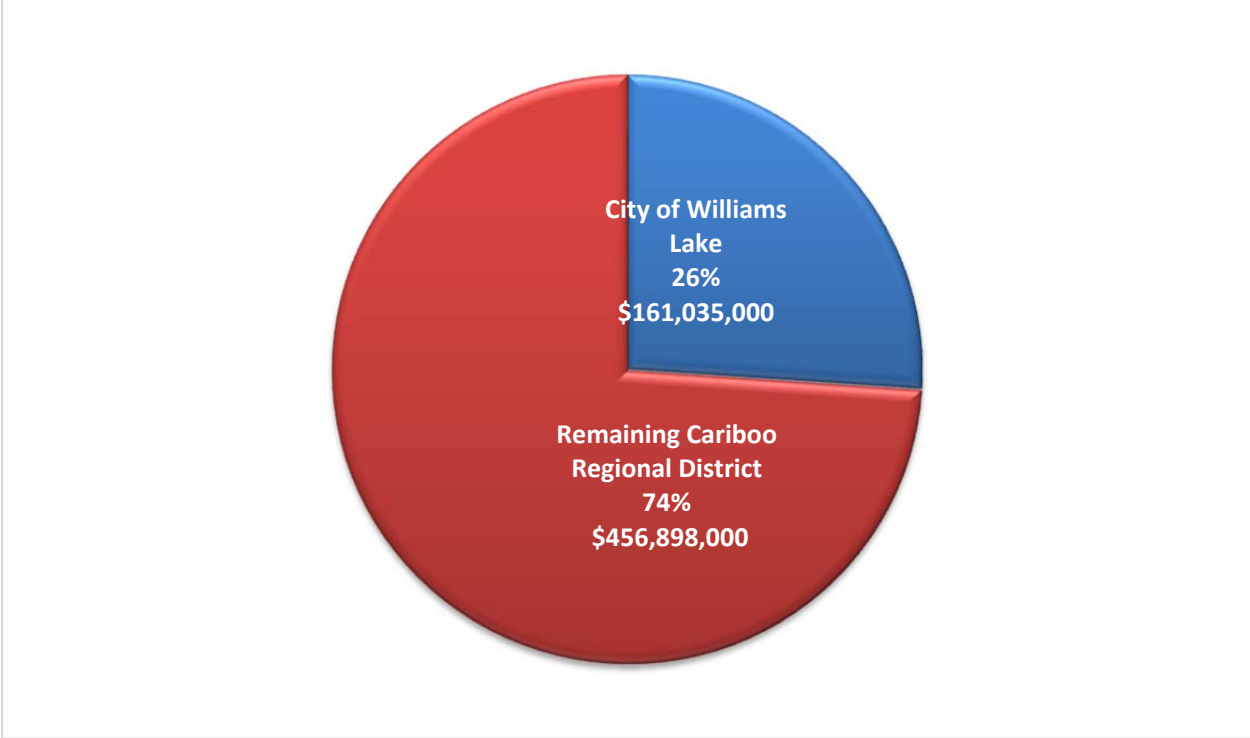
Source: BC Stats (2018c)

However, following the 2017 wildfires, the City of Williams Lake is again enjoying strong construction development. Between January and July 2018, total building permit value was at \$29.1 million. This is compared to only \$7.4 million spent over the same period in 2017 and has already surpassed the \$20.6 million spent in all of 2017 (BC Stats 2018c).

Figure 7 highlights the share of total building permit values for the City of Williams Lake and the remaining Cariboo Regional District over the period between 2008 and 2017. As illustrated, the

City has seen \$161.0 million in building permit values, representing 26% of total value in the Cariboo Regional District.

Figure 7: Building Permit Values for City of Williams Lake and Cariboo Regional District, Total Between 2008 to 2017

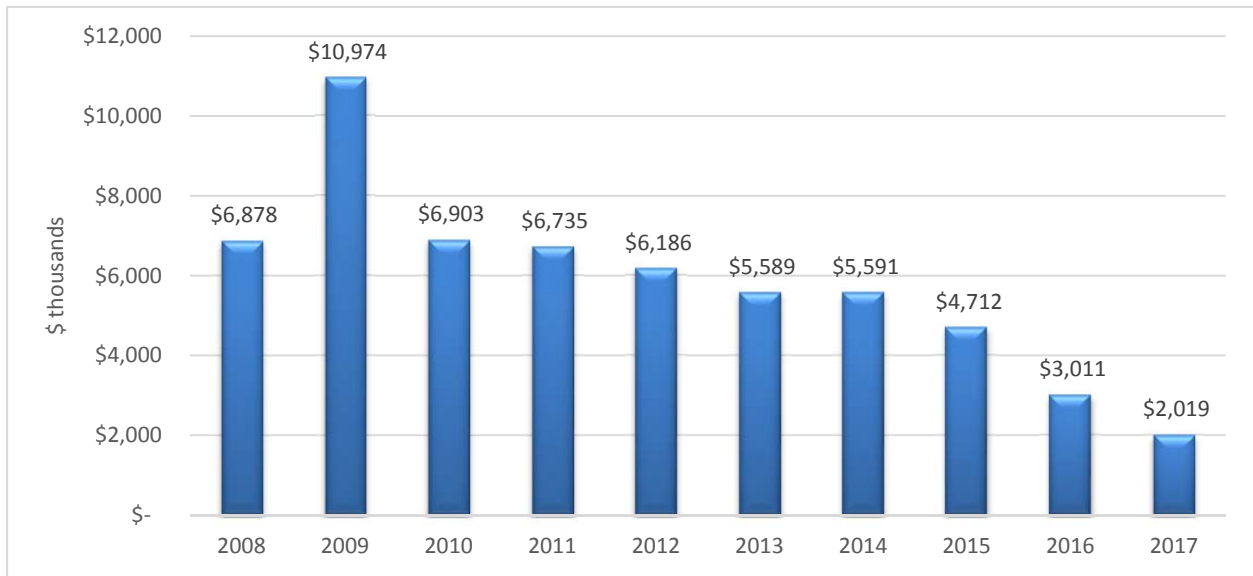


Source: BC Stats (2018c)

Residential Building Permits Values and Housing Starts

Typically, a key component of the local building permit value in a community has been the value of residential housing construction. In the City of Williams Lake, residential permit values have been on a steady decline since 2009. As illustrated in Figure 8, in 2009 residential building permits made up just under \$11.0 million and represented 87.0% of total building permit value. However, in the 2017 wildfire year, housing building permit value had fallen to a low of \$2.0 million and represented only 9.8% of the total building permit value.

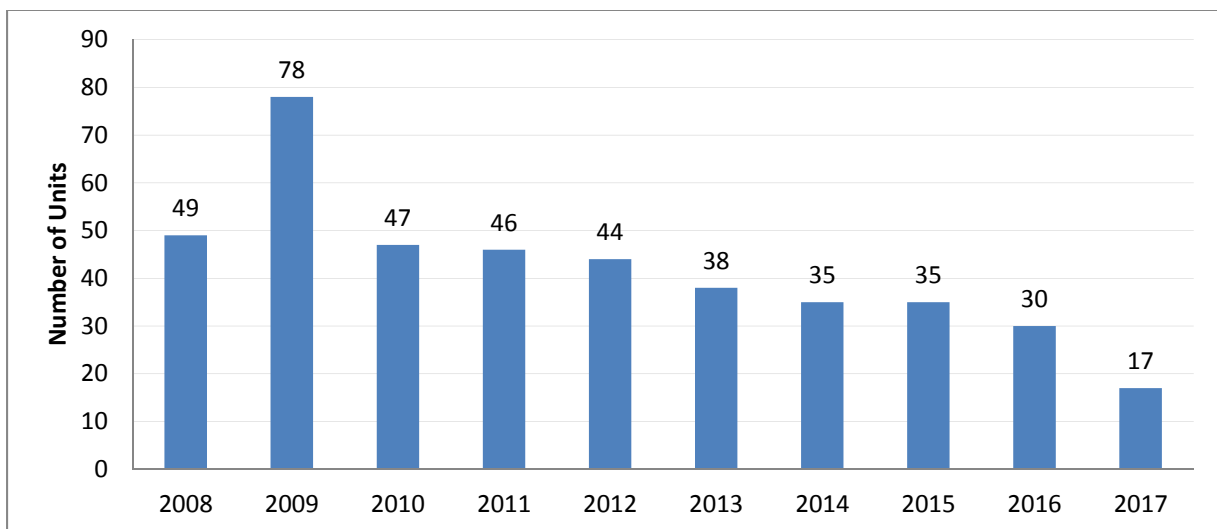
Figure 8: Residential Building Permit Values for the City of Williams Lake, 2008 to 2017



Source: BC Stats (2018c)

This decline is further reflected in actual housing starts over this period (See Figure 9) in which housing starts fell from a peak of 78 in 2009 to only 17 starts in 2017. However, construction in residential housing may be rebounding locally. Between January and July 2018, residential building permits stood at \$8.8 million. This compared to just over \$1.1 million in 2017 and has already surpassed all previous years over the past ten years except for 2009.

Figure 9: City of Williams Lake Housing Starts, 2008 to 2017



Source: BC Stats (2018c)

3 ECONOMIC BASE

3.1 LABOUR FORCE

Table 11 outlines the labour force for the City of Williams Lake, Williams Lake Area and British Columbia in 2016. As illustrated, the City and Williams Lake Area have much larger shares in agriculture and forestry, and mining than seen at the provincial level. This is a primary reason for the larger share in the goods-producing sector locally than seen provincially.

Table 11: City of Williams Lake and Williams Area Labour Force Number and Share, 2016

	City of WL	WL Area	City of WL	WL Area	BC
	Number		Percentage		
11 Agriculture; forestry; fishing and hunting	320	1,300	5.8%	9.9%	3.0%
21 Mining; quarrying; and oil and gas extraction	355	790	6.4%	6.0%	1.2%
22 Utilities	25	85	0.5%	0.6%	0.6%
23 Construction	315	975	5.7%	7.4%	9.2%
31-33 Manufacturing	635	1,180	11.5%	9.0%	7.3%
Total Goods-producing	1,650	4,330	29.8%	33.1%	21.3%
41 Wholesale trade	140	310	2.5%	2.4%	3.8%
44-45 Retail trade	730	1,570	13.2%	12.0%	13.1%
48-49 Transportation and warehousing	255	575	4.6%	4.4%	5.9%
51 Information and cultural industries	50	110	0.9%	0.8%	3.1%
52 Finance and insurance	130	260	2.3%	2.0%	4.3%
53 Real estate and rental and leasing	80	185	1.4%	1.4%	2.5%
54 Prof.; scientific and technical services	255	465	4.6%	3.6%	9.1%
55 Management of companies and enterprises	0	0	0.0%	0.0%	0.2%
56 Admin. & support; waste manag. & remediation	190	395	3.4%	3.0%	5.0%
61 Educational services	280	690	5.0%	5.3%	8.0%
62 Health care and social assistance	625	1,215	11.3%	9.3%	12.5%
71 Arts; entertainment and recreation	65	130	1.2%	1.0%	2.7%
72 Accommodation and food services	480	775	8.7%	5.9%	9.5%
81 Other services (except public administration)	225	530	4.1%	4.0%	5.2%
91 Public administration	290	680	5.2%	5.2%	5.8%
Total Services-producing	3,795	7,890	68.4%	60.3%	90.7%
Not Applicable	100	870	1.8%	6.6%	2.0%
Total	5,545	13,090	100.0%	100.0%	100.0%

Source: Statistics Canada (2017a)

Table 12 compares the goods-producing and service-producing labour forces of the City of Williams Lake and British Columbia for two census periods, 2001 and 2016. Over this period, the local area has experienced a decline in the total labour force, experiencing a 9.7% decline in the City. The goods producing sector has decline by 10.6% over the period, while the service producing sector has declined by 7.9%.

Conversely, the BC labour force has experienced overall growth of 20.0%, with the service producing sector being the driver over the period provincially.

Table 12: Allocation of Employment to Goods and Services Production, 2001 and 2016

Industry Class	City Williams Lake			BC
	2001	2016	%Change	%Change
Goods Producing	1,845	1,650	-10.6%	-13.1%
Services Producing	4125	3,795	-7.9%	+29.3%
Not Applicable	175	100	na	na
Total	6,140	5,545	-9.7%	+20.0%

Source: Statistics Canada (2001) (2017a)

3.2 EMPLOYMENT CONCENTRATION

Location quotients are a tool for comparing a community’s labour force distribution with a benchmark area (in this case BC) to identify comparative advantages and disadvantages. A location quotient of 1.0 for a basic sector indicates that the region employs the same proportion of its labour force in that sector as the province does, and that the region has no comparative advantages or disadvantages. A location quotient of greater than 1.0 indicates that relatively more people are employed in that sector, and that there are comparative advantages at work. Conversely, a location quotient of less than 1.0 indicates that there are relatively fewer people employed in that sector, and that there are likely comparative disadvantages affecting activity.

Table 13 shows how the City of Williams Lake and Williams Lake Area employment concentration by industry has changed between 2001 and 2016. The goods-producing industries in Williams Lake have historically had higher concentrations than the province in sectors such as agriculture and forestry, mining, and manufacturing (primarily forest processing) leading the way. This continues to be the case in 2016, with the City of Williams Lake seeing these three sectors continuing to out perform.

Table 13: Location Quotients for Major Industry in Williams Lake and Williams Lake CA area, 2006 and 2016

	2001		2016		Trend
	City of Williams Lake	Williams Lake Area	City of Williams Lake	Williams Lake Area	
11 Agriculture, forestry, fishing and hunting	1.72	3.51	1.98	3.50	↑
21 Mining, quarrying, and oil and gas extraction	1.68	2.39	5.56	5.62	↑
22 Utilities	0.72	0.43	0.84	1.37	↑
23 Construction	0.80	1.02	0.72	0.97	↓
31-33 Manufacturing	1.86	1.43	1.76	1.51	↓↑
41 Wholesale trade	0.45	0.61	0.73	0.79	↑
44-45 Retail trade	1.14	1.03	1.15	1.12	↑
48-49 Transportation and warehousing	0.68	0.86	0.94	0.95	↑
51 Information and cultural industries	0.57	0.41	0.30	0.33	↓
52 Finance and insurance	0.73	0.57	0.57	0.54	↓
53 Real estate and rental and leasing	0.73	0.52	0.62	0.68	↓↑
54 Professional, scientific and technical services	0.74	0.65	0.59	0.49	↓
55 Management of companies and enterprises	0.00	0.00	0.94	0.43	↑
56 Administrative and support, waste management and remediation services	0.54	0.67	0.83	0.74	↑
61 Educational services	1.10	0.96	0.73	0.82	↓
62 Health care and social assistance	0.90	0.88	1.02	0.87	↑
71 Arts, entertainment and recreation	0.26	0.34	0.45	0.46	↑
72 Accommodation and food services	1.15	0.90	1.10	0.79	↓
81 Other services (except public administration)	0.91	0.86	0.92	0.93	↑
91 Public administration	1.00	1.04	1.09	1.04	↓

Source: Statistics Canada (2001a) (2017a)

The labour force data used in Table 13 is modelled differently to illustrate the shifting structure of the economy in Table 14. The location quotient analysis has already demonstrated that comparative advantages may still exist whether or not an industry is actually growing. Between 2001 and 2016, the Williams Lake Area lost 805 jobs—the shift-share analysis attempts to shed some light on the causal nature of that decline by breaking down the change in employment by industry group into three components:

1. ***Growth or decline arising from general employment growth in the local area***

If provincial employment is growing, then it is reasonable to expect regional and industry growth to be increasing as well. This provincial growth effect is determined by multiplying 2001 base employment by the percentage change in total BC employment between 2001 and 2016.

2. ***Growth or decline arising from the nature of industry in the local area***

The industry mix is calculated by multiplying 2001 base employment by the percentage change in overall employment between 2001 and 2016 in BC, for that industry.

3. ***Growth or decline attributable to the specific conditions of the local area***

This third component is the residual remaining. This local competitive effect is arrived at by multiplying the 2001 base employment by the percentage change in that industry's employment between 2001 and 2016 in the Williams Lake Area, less the percentage change in the industry for BC as a whole.

The provincial effects are all positive because overall provincial employment increased between 2001 and 2016. The industry effects differ substantially by industry and it can be seen that industries important to the Williams Lake Area, namely forestry, agriculture and manufacturing, took the biggest hits. While mining showed strong positive change over the period.

The local competitive effects, the area where Williams Lake has the greatest ability to influence as a community, is the residual employment. In this component, the Williams Lake Area was positive in mining, utilities, and management of companies and enterprises, but negative for all other industries. Large local effects, such as forestry and agriculture, manufacturing, accommodation and food services, and construction indicate that the change in local employment is not easily explained by overall provincial or industry employment changes. In fact, it is well known that closures and downsizings in wood processing capacity and forestry activities have hit the region hard, which might also explain the poor local performance in accommodation, education and construction employment as they are both highly sensitive to the loss of population precipitated by declining forestry activity.

Table 14: Shift-Share Analysis of Major Industry in Williams Lake Area, 2001-2016

	BC Growth	Industrial Mix	Local Competitive	Total Change
11 Agriculture, forestry, fishing and hunting	643	-94	-1134	-585
21 Mining and oil and gas extraction	77	244	264	585
22 Utilities	11	5	39	55
23 Construction	277	709	-766	220
31-33 Manufacturing	638	-246	-1073	-680
41 Wholesale trade	116	23	-149	-10
44-45 Retail trade	550	588	-1074	65
48-49 Transportation and warehousing	223	144	-397	-30
51 Information and cultural industries	59	31	-149	-60
52 Finance and insurance	104	78	-232	-50
53 Real estate and rental and leasing	49	69	-63	55
54 Prof., scientific and technical services	202	350	-637	-85
55 Management of companies and enterprises	0	0	10	10
56 Admin and support, waste management and remediation services	124	197	-241	80
61 Educational services	311	358	-824	-155
62 Health care and social assistance	407	577	-949	35
71 Arts, entertainment and recreation	36	52	-43	45
72 Accommodation and food services	344	432	-890	-115
81 Other services (except public admin.)	194	161	-369	-15
91 Public administration	296	201	-668	-170

Source: Statistics Canada (2001) (2017)

3.3 ESTABLISHMENT SIZE AND TRENDS

Table 15 outlines the number of establishments by location and with employees in the City of Williams Lake, Cariboo Regional District and British Columbia between 2010 and 2016. As illustrated, the number of establishments with employees has remained relatively stable over the period for Williams Lake and the Cariboo Regional District. Over the same period, the province has experienced an increase of 11.1% in the number of establishment locations with employees.

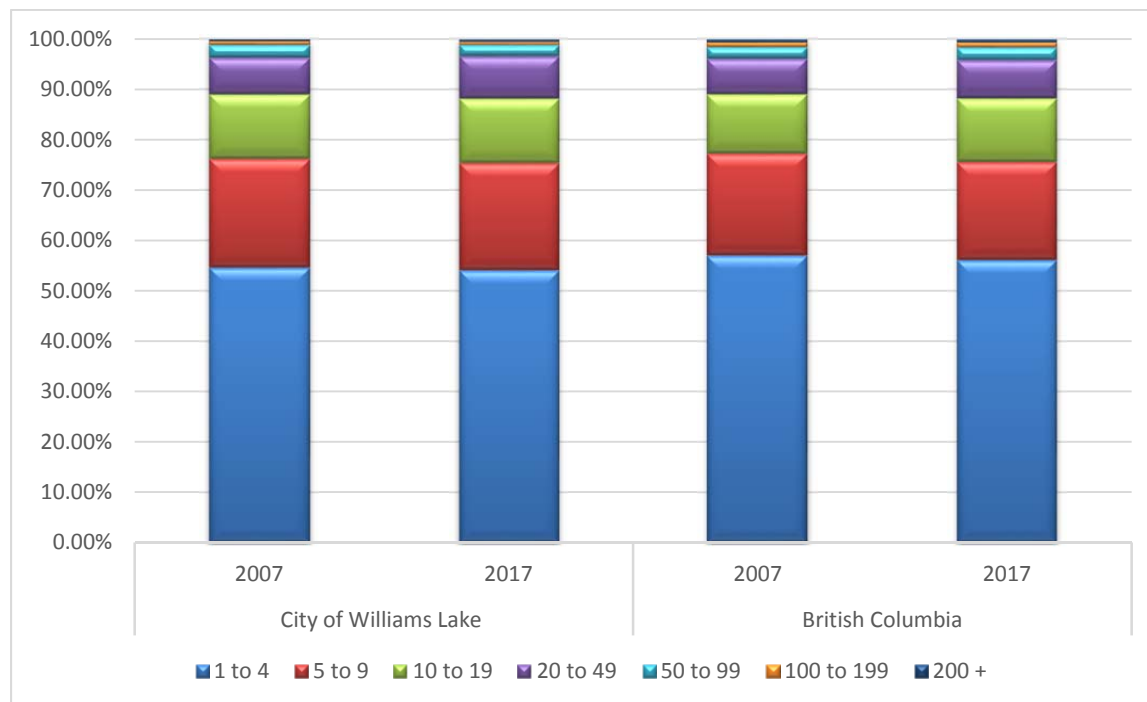
Table 15: Number of Establishment Locations in the City of Williams Lake, Cariboo Regional District, and BC, 2010-2016

	2010	2011	2012	2013	2014	2015	2016	2017
City of Williams Lake	736	765	769	756	772	754	750	717
Cariboo RD	2,592	2,584	2,618	2,651	2,601	2,546	2,580	2,542
British Columbia	175,913	173,589	175,950	183,667	190,384	192,260	195,980	198,624

Source: BC Stats (2018b)

Figure 10 highlights the number of establishment locations based on the range of employees employed. As illustrated, and as expected, establishments with one to four employees make up the largest number of establishments in both the City of Williams Lake and British Columbia. Most of the remaining businesses fall in the 5 to 49 employee level. The City of Williams Lake closely follows the business share observed at the provincial level and, overall, highlights the importance of small business in the province and locally.

Figure 10: Distribution of Establishments by Number of Employees, 2007 and 2016



Source: BC Stats (2017)

3.4 BUSINESS LICENSES

The City of Williams Lake maintains counts on business licenses issued for the City. As illustrated in Table 16, the number of business licenses has remained relatively constant over the past four years. The Electoral Areas of the Cariboo Regional District do not collect business license fees; therefore, they do not have business license data.

Table 16: City of Williams Lake Business Licenses, 2014 to 2017

	2014	2015	2016	2017
Renewed	898	876	842	851
New	73	82	94	121
Total Number of Licenses Issued	971	958	936	972

Source: City of Williams Lake (2018)

4 TRENDS AND SECTORS ANALYSIS

4.1 MACROECONOMIC TRENDS

Economic Development is influenced by both internal conditions and macro-economic events and trends. The following paragraphs identify some prominent developments that are reshaping the strengths and challenges that a community like Williams Lake should consider, moving forward.

Trade and financial markets have become globalized. Trade has increased dramatically over the last two decades. Global exports as a share of global GDP increased from just below 20% in the early 1990s to over 30% at the peak of the financial crisis in 2007-08. Despite recent setbacks to trading activities such as BREXIT and emerging challenges around renegotiations with NAFTA, trade relations are clearly emerging as a key wealth generator and will continue to expand as companies and countries see the values of integrated trade. Domestically, the recent free trade agreement with the European Union, and potential agreement with Pacific Rim countries and other jurisdictions, will amplify the effects of globalization.

Fragile globalization in a multipolar world. Fears about weakening enthusiasm for globalisation have, seemingly, been realised in the past few years. However, there are numerous variables that will shape whether the purported antitrade environment of 2016 lasts to 2035. In the most likely scenario, globalisation patterns will be shaped less by politics and more by structural factors. Global trade is steady as a percentage of global growth, likely due to China's reorientation towards domestic consumption and the maturing of trade in goods. A more services-oriented economy will have different requirements for global trade governance, but Beijing, Brussels, and Washington will remain the key decision points for global economic affairs. (CEPS. 2017)

Industrial and technological revolution. By 2035, technological advances will have a major impact on the social and economic foundations of society, potentially more far-reaching than the initial phase of computerisation from the 1980s onwards. Technologies involving automation and machine learning have the potential to disrupt job markets, making millions of jobs obsolete. As technologies like self driving cars begin to proliferate, governments at all levels will be faced with questions of adaptation, governance, and human development. Countries will be forced to consider how much of their core information infrastructure they will permit to be run by companies domiciled in other countries. (CEPS. 2017)

Global population growth and urbanization continues to grow. The world's population is currently 7.6 billion and is expected to grow to 9.8 billion by 2050, with most of this growth in Asia (UN 2017). The global population is expected to continue growing, but at a slower rate. It will also get gradually older as life expectancies rise. An expanding middle class living in urban areas will stimulate business and significantly increase demand for physical and soft infrastructure (Martin 2014).

Environmental and sustainability issues have become a prominent component of future economic development. Preliminary estimates suggest that the level of global energy-related CO² emissions increased in 2017 after remaining flat for three consecutive years (CarbonBrief.2017). The frequency of weather-related shocks continues to increase, also highlighting the urgent need to build resilience against climate change and prioritize environmental protection. In Williams Lake the community may already be experiencing the implications of climate change weather-related shocks as with record wildfire seasons in 2017 and 2018. Overall, the existence of interlinkages among social, economic and environmental dimensions is perhaps the most fundamental tenet of the concept of sustainable development (UN 2018).

Policymakers across the world face a number of challenges if they are to achieve sustainable long-term economic development. Structural developments, such as ageing populations and climate change, require a forward-thinking policy which equips the workforce to continue to make societal contributions later on in life and promotes low carbon technologies. Overall, as the environmental crisis deepens, leaders must embed sustainable cultures as critical natural resources run out (Koren Ferry HayGroup 2017).

The Canadian economy is undergoing profound structural change. The Canadian economy was built on the exploitation of extractive resources whose economic rents allowed companies to prosper, gave workers relatively high wages and helped grow communities and regions. However, increased worldwide production, increased business costs, substitution effects and other competitive drivers eventually eliminated those rents and the competitive advantage producers used to benefit from. Primary and other manufacturing industries have all experienced this transition and are no longer able to provide the tax, employment, income and other economic benefits that they once did.

Manufacturing is on the decline. The economies of industrialized, western nations continue to experience a transition from goods production to service production due to globalization, competition from developing and emerging markets and the increasing adoption of technology, particularly computer systems and the Internet. Manufacturing capacity has shifted overseas to lower cost jurisdictions, with less onerous environmental regimes and proximity to emerging

markets. In Canada, manufacturing currently directly accounts for about 10% of Canadian GDP, down from close to 20% in the year 2000 and as high as 30% in the early 1950s (RBC 2017). However, this trend is not necessarily universal, homogenous or uni-directional; as capacity becomes more globally balanced some developed regions will inevitably experience new areas of growth.

Technology is on the ascendency. Manufacturing is increasingly technology-led with integrated software systems, flexible and innovative manufacturing concepts, virtual production through computer modelling, sophisticated supply chain management and the like. Production centres that are not considered a competitive advantage, including many routine business functions (such as basic manufacturing and customer service desks) are being outsourced, with technology as the enabling mechanism.

Competition for human capital is intense. Throughout the World there is approximately 201 million workers unemployed, or 5.8% of the labour force (International Labour Organization 2017). Yet many employers are saying they cannot find the workers with the skills they need. There is a growing skills gaps with youth unemployment, which is a specific area of concern. In addition, skilled labour is increasingly becoming more mobile with workers now moving around the globe in search of work.

Food, water and energy are the most valued commodities. Global population growth will increase demand for food, water and energy resources worldwide (National Intelligence Council 2012). Canada has these commodities in abundance and is well positioned to increase trade in related products and services.

Globalization has changed the ground rules for economic development. Globalization has created a new playing field for economic development practitioners that places increasing emphasis on the need for locally-driven and measurable programs. First, it has forced them to evaluate, justify and articulate their competitive advantages in a global context. Second, it has highlighted the inherent advantages of focusing on existing firms as centres of growth or development. Third, it has put more emphasis on the potential of young companies and entrepreneurs that represent the new jobs in the future. And finally, it has shifted brand recognition to a global and not simply a regional or even national setting (Morfessis and Malachuk 2011).

In the context of global and national socio-economic trends, there is a growing level of participation in regional economic development collaboratives. Cooperation and active collaboration is supplanting competition, particularly in terms of place marketing where regions are much more likely to build leveraged programs that can connect with decision-makers than individual communities (Berzina 2014).

Regions then become attractive, not by selling their physical space but by selling themselves as a community with the right combination of business and social attributes that fit the new economy.

Raising the bar on the skilled, experienced, and educated labour pool through increasing education attainment levels, continuing education and training opportunities (especially for in-demand technical and professional skills) and greater involvement of the private sector in human development programs is an emerging trend. Local education, workforce training, and talent attraction and retention issues has become more prominent among practitioners.

Enhancing 'quality of life' features that serve the recruitment and retention of technologists, technicians, skilled trades and professionals is also becoming a key economic development focus. Quality of life is determined by reasonable housing costs, strong basic education achievement, access to colleges and universities, low crime rate, accessible health services, diverse retail, personal and business service capacity, cultural vibrancy, healthy tourism sector, efficient transportation systems and an attractive, clean environment.

Creating a positive and actively supportive business climate with a reliable, efficient development process, cohesive land use and zoning that encourages appropriate business expansion and retention and the deployment of infrastructure that will catalyze private investment is allowing leading edge communities to change their economic direction in a positive fashion.

4.2 KEY SECTORS

There are several key sectors that create the City of Williams Lake's economic base. The following snapshots focus on sectors that represent potential targets for future development because of their employment and income impacts.

Forestry

The Williams Lake Timber Supply Area (TSA) lies in the central Cariboo Region and is bounded by the Quesnel TSA to the north and 100 Mile House and Lillooet TSAs to the south. Williams Lake is the largest community in the Williams Lake TSA. Smaller communities include Alexis Creek, Horsefly, Likely, Anahim Lake, Tatla Lake, Riske Creek, Big Creek, Nimpo Lake, 150 Mile House, Big Lake and McLeese Lake. There are ten First Nations communities within the Williams Lake TSA.

One of the largest TSAs in the province, the Williams Lake TSA covers about 4.93 million hectares. The Williams Lake TSA is administered by the Cariboo Chilcotin Natural Resource District in Williams Lake. The allowable annual cut (AAC) for the Williams Lake TSA is 3 million

cubic metres and was set on February 25, 2015. One half of the current AAC is allocated to green wood harvesting; the other half is allocated to dead wood caused primarily by the Mountain Pine Beetle epidemic. Generally, a new AAC is set at least once every 10 years. (BC FLNRO. 2007)

The adverse impacts of the 2017 wildfires combined with the past ravages of the Mountain Pine Beetle and the current fir and spruce beetle epidemics have resulted in *“a lot of Cariboo forests which are not in very good health or condition”* (McNaughton 2017, pers. comm.). Given the aforementioned, ongoing climate change and potential new forest management practices being put in place with regards to tree cover and wildfire management, it is difficult to ascertain how the AAC for the Williams Lake TSA may be impacted at its next review. Anecdotal comments suggest forest sector operators have been anticipating the next AAC will be less than its present amount given current decision criteria. This has significant implications for the Williams Lake and area forest sector.

The forestry sector has been the primary economic engine for Williams Lake and the Cariboo Chilcotin region for decades, and despite sharp job losses between 2001 and 2011, remains so today. As illustrated in Table 17, the Williams Lake and area forest sector labour force has remained steady between 2011 to 2016 and is likely to be similar over the next few years. Overall, given the amount of ongoing consolidations, industry rationalization and job loss that has taken place in much of the Province’s forest sector over the past 15 years, the forest sector in the Williams Lake area appears comparatively to be doing well.

Table 17: Williams Lake Area Forest Sector Labour Force, 2001 to 2016

	2001	2006	2011	2016
113 Forestry and logging	915	895	605	670
1153 Support activities for forestry	475	210	255	220
321 Wood product manufacturing	1,760	1,340	1,080	1,055
322 Paper manufacturing	20	10	15	-
Total	3,170	2,455	1,955	1,945

Source: Statistics Canada (2001b) (2007) (2011) (2018)

However, due to the impacts of the 2017 wildfires, the beetle epidemics, the ongoing Softwood Lumber dispute (and its associated tariffs) and perhaps the disintegration of the North America Free Trade Agreement, there is a great amount of uncertainty at present. This is making it challenging for local forestry related companies to make mid and long-term commitments and plans. The uncertainty also impacts Williams Lake and area residents and businesses across all

sectors who are concerned that these matters will have a negative impact on others' investment and expenditure decisions as well as their own in the coming years.

Prior to the wildfires, the forest industry was looking at a pending shortage of wood and high costs in a highly competitive industry. West Fraser was predicting a looming reduction of five average sized facilities (sawmills and plywood plants) in the region between Kamloops and Quesnel when the Mountain Pine Beetle wood ran out. The number of shuttered facilities is now expected to increase by an additional 10% as a result of the wildfires.

West Fraser estimates only 30% of the burned timber will be salvageable due to burn severity, shelf life limitations (2-4 years), land use constraints and access limitations. Given the upcoming short-term salvage period, it is likely that the wildfires have pushed back industry rationalization (i.e. downsizing) in the Cariboo Chilcotin region; however, by how long is difficult to say.

Over the years there has been consolidation of primary licensees and fluctuations in the number of primary and value-added operations within the municipal boundaries of the City. Currently there are two major licensees, Tolko and West Fraser, operating 3 sawmills and a plywood plant which, combined with their forestry divisions, directly employ approximately 850 people and contract employ over 600 loggers, truckers, tree planters, field services personnel, etc. (Hoffman, 2018 pers comm; and Antrim, 2018 pers comm).

In recent years and currently, there have been significant investments by Tolko and West Fraser in modernizing their manufacturing operations in Williams Lake. This may bode well for the City when future industry rationalization decisions are made by these two primary licensees.

There are four major value-added related firms operating within the city limits: Atlantic Power, Parallel Wood Products, Pinnacle Pellet, and Sigurdson Forest products. Atlantic Power's mid to long term operations are uncertain due to BC Hydro's Integrated Resource Plan (IRP) update, which is considering the future role of biomass in the utility's mix of power generation resources. Additionally, Tolko and West Fraser are utilizing more of their fiber and waste outputs than they have in the past which is causing some of these value-added producers to look for new ways of generating the resource inputs they require for operational sustainability.

Surrounding the City are three world class handcrafted log and timber frame home builders. Of note, the success of Timber Kings (Pioneer Log Homes) for four seasons on HGTV has brought tremendous exposure and marketing of Williams Lake and area to a very large international audience and generated community pride amongst local residents.

Millions of dollars in investments in the Williams Lake TSA are beginning to be applied in planning, silviculture and land reclamation activity brought on by the impacts of the 2017

wildfires. This is equating to an increase in related job opportunities both in the public and private sector. Much of this investment and jobs are expected to last for multiple years which may help to offset potential future job losses related to industry rationalization.

In addition to these investments, up to 70 % of burnt timber deemed unfeasible by the major licensees could be available for other uses if other businesses and entrepreneurs with or without government support can figure out how to utilize it in an economically rewarding manner.

First Nations in the Williams Lake TSA are becoming increasingly involved in many aspects of the forest sector. A number of positive partnerships are already in place between some bands and non-First Nations forestry related companies in Williams Lake and area. However, ongoing operational consultations, land claims and court rulings create a degree of uncertainty and delay, which is not inconsequential to the forest sector in the region. This is expected to be a dynamic and fluid situation for years to come.

The City of Williams Lake is enjoying a positive and financially rewarding partnership with the Williams Lake Indian Band through their shared Community Forest. In 2018 the community forest netted the partners over \$1.8 million in revenues. This return essentially covers a 4-year term since the community forest license was granted. While future year to year returns will vary, the Community Forest represents a foundational cornerstone to closer working relationships and partnerships with the Williams Lake Indian Band.

Mining

There are two active metal mines and one industrial mineral mine within close proximity to the City of Williams Lake including:

- Taskeo Mine's has an office in Williams Lake and the Gibraltar copper mine is located approximately 60 kilometres from Williams Lake. This mine has a mine life of 22 years and a direct workforce of 660.
- On Quesnel Lake, approximately 132 kilometres from the City of Williams Lake is Mount Polley copper-gold mine operated by Imperial Metals Corporation. This mine employs 350 and has a mine life of 9 years or more. (Jago. nd)

In addition, the historical Cariboo gold belt has seen gold exploration expenditure increase by \$19 million, or 70% between 2016 and 2017 (MEMPR. Nd). Potential mine development in the local area looks positive with the focus on the proposed Spanish Mountain gold-silver open pit mine located 97 km from the City of Williams Lake. This mine, if developed, would have a mine life of over 14 years (Jago. Nd).

As illustrated in Table 18, mining employment has been associated with a steadily increasing labour force over the past fifteen years; however, it has pulled back somewhat more recently. Overall, employment has more than tripled between 2001 and 2016 with employment now standing at 745. Looking ahead, the Mount Polley mine continues to face challenges after their tailings pond failure, and timing from the Spanish Mountain development remains undefined, creating an uncertain future as to the direction of mining employment in the area over the next few years.

Table 18: Williams Lake Area Mining Sector Labour Force, 2001 to 2016

	2001	2006	2011	2016
212 Mining (except oil and gas)	185	500	760	630
213 Support activities for mining	20	85	125	115
Total	205	585	885	745

Source: Statistics Canada (2001b) (2007) (2011) (2018)

Agriculture

Agriculture has played a key role in the history and development of the Williams Lake Area. This is exemplified each year by the Williams Lake Stampede which has been held annually since 1919, the same year that the Pacific Great Eastern Railway connected to Williams Lake. Williams Lake is home to the largest stockyard in BC. It markets cattle from as far south as Clinton, as far north as Quesnel, as far west as Bella Coola and as far east as Horsefly. (Williams Lake Stampede. 2018)

In 2016, the Williams Lake Area reported 355 farms. This is down from 406 reported in 2011. Among the 355 farms in 2016, 145 were active in beef cattle ranching, 74 identified as hay farms, and 40 farms were engaged in horse and other equine production. A variety of other farming activities were also undertaken in the Area including: sheep and goat farming (14 farms); poultry and egg production (10 farms); chicken egg production (10 farms); vegetable and melon farming (8 farms); greenhouse, nursery and floriculture production (8 farms); fruit and vegetable combination farming (5 farms). (Statistics Canada. 2017c).

As illustrated in Table 19, farms ranged in size from under 10 acres to over 3,520 acres. When compared to 2011, the number of farms reporting 10 acres or less has remained the same, while farms in the 10 to 129-acre range have decreased. There were 35 farms over 3,520 acres in 2016, up from 31 in 2011 (Statistics Canada. 2017d).

Table 19: Williams Lake Area Farms by Size, 2011 and 2016 (Acres)

	2011	2016
Farms under 10 acres	23	23
Farms 10 to 69 acres	75	67
Farms 70 to 129 acres	44	26
Farms 130 to 179 acres	62	47
Farms 180 to 239 acres	15	24
Farms 240 to 399 acres	35	34
Farms 400 to 559 acres	27	19
Farms 560 to 759 acres	21	19
Farms 760 to 1,119 acres	20	20
Farms 1,120 to 1,599 acres	18	13
Farms 1,600 to 2,239 acres	17	11
Farms 2,240 to 2,879 acres	6	11
Farms 2,880 to 3,519 acres	12	6
Farms 3,520 acres and over	31	35
Total number of Farms	406	355

Source: Statistics Canada (2017d)

In 2016, there was 355 farms in the Williams Lake Area, this was a decline from the 406 farms reported in 2011. However, in 2016 total capital value of all farms was \$714.7 million, this is a slight increase from 2011 when total capital value was reported at \$697.6 million (Statistics Canada. 2017e). The vast majority of the total capital value was in land and buildings.

Overall, and as illustrated in Table 19, Williams Lake Area farms generated \$38.7 million in gross receipts in 2015, which is 75.3% more than in 2010 when almost \$22.1 million was generated in gross receipts.

Table 20: Williams Lake Area Farms By Total Gross Farm Receipts, 2010 and 2015

	2010	2015
Total gross farm receipts (excluding forest products sold)	\$22,059,514	\$38,664,153
Farms, under \$10,000	168	125
Farms, \$10,000 to \$24,999	94	71
Farms, \$25,000 to \$49,999	54	40
Farms, \$50,000 to \$99,999	41	44
Farms, \$100,000 to \$249,999	27	34
Farms, \$250,000 to \$499,999	15	19
Farms, \$500,000 to \$999,999	6	14
Farms, \$1,000,000 to \$1,999,999	1	7
Farms, \$2,000,000 and over	0	1

Source: Statistics Canada (2017f)

However, as illustrated, there is a noticeable range in the distribution of gross farm receipts. While the majority of farms earn under \$10,000, there were 119 farms earning \$50,000 in gross receipts or more in 2015.

As noted above, cattle ranching is a key activity in the Williams Lake and larger Cariboo Regional District. Table 21 outlines the number of farms with cattle and calves and the associated number of cattle in 2011 and 2016. As illustrated, the number of cattle and calves was over 50,749 head in 2016, up almost 2,000 animals from 2011.

Table 21: Williams Lake Area Cattle and Calve Farms and Numbers, 2011 and 2016

		2011	2016
Total cattle and calves	Number of farms reporting	235	228
Total cattle and calves	Number of animals	48,883	50,749

Source: Statistics Canada (2017g)

However, cattle numbers have likely declined since 2016 given the considerable damage to farms and loss of cattle in the 2017 wildfires. It is estimated that throughout the Cariboo Regional District and adjoining Clinton-Ashcroft area over 2,000 head of cattle were lost (Boone 2018, pers. comm.).

Table 22 outlines the change in agriculture labour force over the period between 2001 to 2016 for the Williams Lake Area. The agriculture labour force is concentrated in the rural area in the Williams Lake Area, with a very small portion of the labour force actually located inside the City of Williams Lake. Over the past 15-year period, employment has been declining since 2006 but appears to be recovering since hitting a low in 2011.

Table 22: Williams Lake Area Agriculture Labour Force, 2001 to 2016

	2001	2006	2011	2016
111-112 Farms	570	645	390	450
1150 Support activities for farms	15	10	0	10
311 Food manufacturing	15	35	0	30
Total	600	690	390	490

Source: Statistics Canada (2001b) (2007) (2011) (2018)

Tourism

The City of Williams Lake serve as the gateway to a diverse range of tourism products including outdoor recreation, heritage sites, and circle tours that leverage the Cariboo Chilctotin’s wilderness areas. Specifically, the City is renown for its Williams Lake Stampede which has been

on going since 1919. More recently, the City of Williams Lake has become known as the hub for the region’s world renown mountain biking trails.

In the Williams Lake Area, tourism has always played an important supporting and key diversifying role in the local economic base (Horne 2009). Tourism creates employment across several sectors; however, three of these are primarily associated with tourism and travel spending including arts, accommodation, and food services. As outlined in Table 23, and using these three sectors as a proxy for the trend in tourism, we see that in 2016 collectively they employed a labour force of 1,075, versus 1,140 in 2001 when the local labour force was at its peak.

Table 23: Williams Lake and Area Tourism Labour Force, 2001 to 2016

	2001	2006	2011	2016
71 Arts, entertainment and recreation	110	220	285	155
721 Accommodation services	155	180	235	140
722 Food services and drinking places	875	720	850	780
Total	1,140	1,120	1,370	1,075

Source: Statistics Canada (2001b) (2007) (2011) (2018)

Williams Lake is part of the Cariboo Chilcotin Coast (CCC) tourism region. The number of visitors coming through the region is unknown. Tourism indicators for the CCC Tourism region have been positive up until recently with 528,000 overnight visits generating close to \$168 million in related spending. Domestic overnight travellers accounted for 73% of visitation and 62% of related spending. International travellers accounted for 16% and 30%, respectively (Destination BC 2017). In terms of trip activities, outdoor recreation still dominates, with boating, wildlife viewing, visiting national/provincial parks, fishing, hiking and camping all popular. Some cultural activities, including visiting historic sites and museums/art galleries, also ranked as top trip activities among US and international travellers.

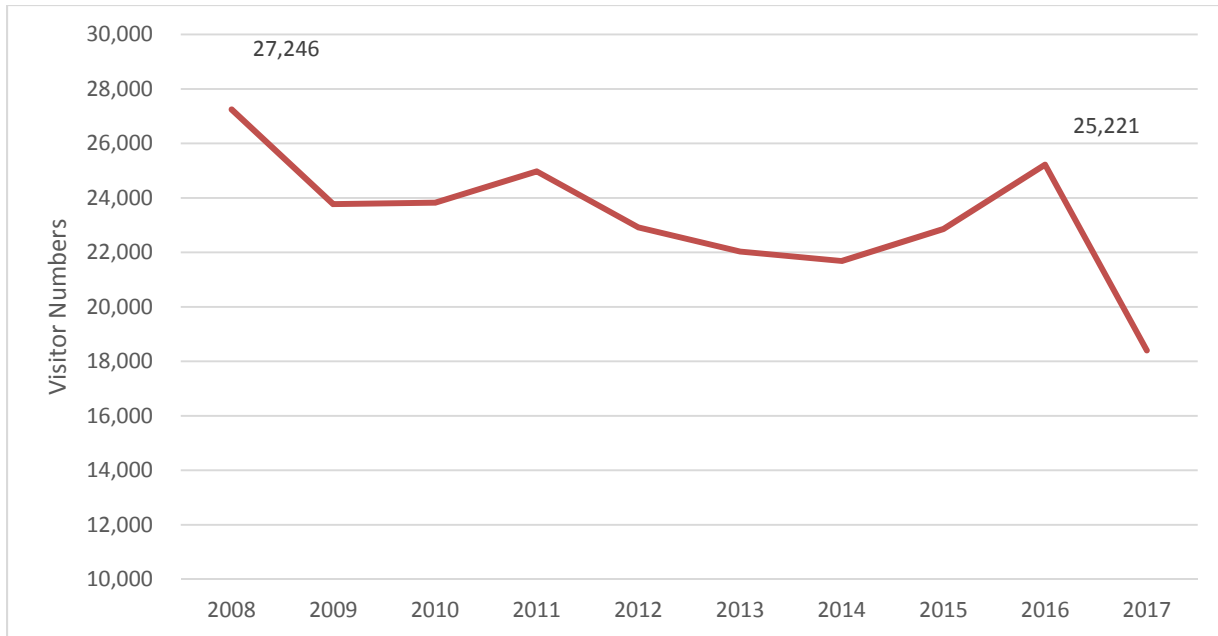
The available tourism indicators in the Williams Lake Area generally reflect recent negative impacts on Williams Lake Area. As illustrated in Figure 11, Visitor Centre attendance has been on a long-term decrease, declining marginally from 27,246 in 2008 to 25,221 in 2016. In addition, in 2017 the wildfire season resulted in the evacuation of the City Williams Lake and resulted in a strong drop in visitors to the Area. Community Futures Ambassador Program identified 39 accommodation and food services businesses with losses totaling \$678,371 and 16 arts, entertainment and recreation firms with losses of \$149,350 (LeChance 2018, pers. comm.)

Despite post wildfires tourism marketing campaigns and reputation recovery efforts, challenges continue to be faced by the regional tourism industry as a result of the wildfires. These include a lack of financial recovery from the 2017 wildfires, limited 2018 bookings and reduced local

investment in bookings and sponsorships. In addition to these major challenges, the delayed arrival of a new BC Ferry serving Bella Coola is very troubling for tourism operators in that area / Highway 20 corridor and will have long term negative consequences. (City of Williams Lake. 2018b)

BC Parks total attendance has also declined in the Thompson Cariboo region between 2015/16 and 2017/18 by 26%. Revenue was down 13% (Lions Gate Consulting 2018).

Figure 11: Williams Lake Visitor Centre Attendance, 2008-2016



Source: Destination BC (2017)

Moving forward to address some of the emerging issue is the formation of a new sub-regional marketing partnership amongst a number of communities and the Cariboo Regional District to market the Gold Rush Trail corridor from Clinton to Barkerville and Wells. In addition, and driven by the Province and Destination BC, Tourism Destination Development Plans have been undertaken for three areas in the Cariboo Chilcotin region that involve Williams Lake. The Gold Rush Trail plan directly involves the City as it encompasses much of the Highway 97 corridor. The other two plans: Chilcotin Central Coast and Highway 24 Interlakes are ancillary plans with the City being a connecting hub for tourists travelling to those areas.

Finally, a new three per cent tax on accommodations was approved for the Cariboo Chilcotin Coast area and took effect May 1, 2018. The funds will be managed by a local tourism industry marketing committee, and it is expected the Municipal, Regional District Tax (MRDT) will

stimulate an injection of approximately \$1 million in new marketing funds annually to drive more visitation to the region (MyCaribooNow. 2018).

Public Services

Public services, made up of health and social services, education, and public administration, is an important economic sector in the City of Williams Lake and surrounding area. As illustrated in [Table 24](#), the overall labour force for this sector in Williams Lake and Area has been trending downward in the most recent census periods. Despite the decline, in 2016, the labour force of 2,760 in public services represented 20.8% of the total local and regional labour force of 13,275.

Health services in the City of Williams Lake is centred around the **Cariboo Memorial Hospital**. The Cariboo Memorial Hospital & Health Centre is a Level 2 Community Hospital in Williams Lake. With 28 inpatient beds, the hospital offers ER, ICU, OR, med-surg, and obstetrical units. In addition, the hospital has lab and diagnostic imaging and an outpatient hemodialysis unit on-site. Residential beds are embedded within med-surg unit on second floor of hospital. (IHA. 2018a)

The community also has several other key health and social services in the community including the Williams Lake Health Centre and doctors' offices including Borland Medi Clinic which provides walk in services. The community also has the **Williams Lake Mental Health Centre** which supports many services including adult community support, adult short-term assessment and treatment, community residential programs, geriatric programs, crisis intervention, day and outpatient programs, addictions counselling, concurrent disorders services, group therapy, peer support, and after-hours mental health support (IHA. 2018b). In addition, the **Williams Lake Seniors Village** has 113 residential care rooms, 93 assisted living suites and 25 independent living suites. The Village strives to support clients to maintain an independent life style in the community (IHA. 2018c). Overall, health care and social services employment has remained relatively constant between 2001 and 2016.

The City of Williams Lake is the hub of **School District No. 27** (Cariboo-Chilcotin). School District 27 is one of the largest employers in the Cariboo-Chilcotin Region with over 1,000 employees (SD 27. 2018). Overall, there are 22 schools located in the District which covers a large area extending from 100 Mile House in the south to Tatla Lake in the West and Horsefly in the east. In 2016/17 there were 4,640 students enrolled in the school district, down from 5,046 students enrolled in 2012/13, but up from the 4,590 students enrolled in 2015/16 (BCME.2017). In addition to the public schools there are also four private schools in the City of Williams Lake with an enrollment of 422.

At the post secondary level, **Thompson Rivers University** (TRU WL) operates a satellite campus in Williams Lake. It offers a variety of programs and courses including Year 1 and 2 university transfer courses, Year 1 and 2 of the RN nursing programs, and trades training (TRU. 2018). In addition, TRU WL is the only training institution in BC that offers the Saw Filer Apprenticeship and Applied Sustainable Ranching programs. Student enrollment growth is projected to be 2-3% over the coming years (Saunders 2018, pers. comm.).

There are a variety of public services located in Williams Lake and Area including local, regional, Indigenous, provincial and federal government public services. Several provincial government ministries maintain a presence out of the provincial government office located in downtown Williams Lake. Between 2001 and 2016 there has been a small decline in the overall local and regional public sector employment, with the decline being in administration at the provincial and federal government level and in the education sector. Conversely, health care and social assistance is similar in 2016 to what it was in 2001 - having recovered from declines between 2001 and 2006.

Table 24: Williams Lake and Area Public Service Labour Force, 2001 to 2016

	2001	2006	2011	2016
61 Educational services	955	860	960	800
62 Health care and social assistance	1,250	1,110	1,165	1,285
91 Public administration	910	760	1,000	740
Total	3,115	2,730	3,125	2,825

Source: Statistics Canada (2001b) (2007) (2011) (2018)

Retail

The City of Williams Lake is the service and retail hub for the City and surrounding region. The downtown has been the service centre for the community since the City's inception and continues to supply personal services, shipping and office needs. A variety of retailers are located in the downtown core with Save-On Foods and Safeway among the larger retailers. Boitano Mall is also located downtown and is home to such retailers as Staples and Mark's as well as professional service providers. Boitano Mall is currently exploring redevelopment options to reposition some of its space into a mixed residential and community care facility.

In the Spring 2014, Prosperity Ridge Shopping Centre opened in Williams Lake creating a location for retailers such as Wal Mart, Dollarama, and Sportchek (Northwest Alanatic. 2018). The community also has a diversification of car retailers, recreation retailers, gas stations and range of service providers catering to the region's industrial activities. Table 25, outlines the labour force associated with retail services in Williams Lake and area between 2001 and 2016.

In recent years the size of the retail labour force has been stable and remains significant. Among the retail sub-sector, food and beverage stores (NAICS 445) is the largest with a labour force of 445, followed by motor vehicles and parts dealers (NAICS 441) with a labour force of 305.

Table 25: Williams Lake and Area Retail Labour Force, 2001 to 2016

	2001	2006	2011	2016
41 Wholesale trade	355	575	365	345
44-45 Retail trade	1,690	1,335	1,585	1,755
Total	2,045	1,910	1,950	2,100

Source: Statistics Canada (2001b) (2007) (2011) (2018)

4.3 MAJOR PROJECTS

The following six projects are listed in the major project inventory in the Williams Lake and surrounding area in 2018.

Currently, there are two projects listed for the City of Williams Lake including:

- **Cariboo Memorial Hospital** – this project is a redevelopment of Cariboo Memorial Hospital; concept plan has been approved; business plan development is underway. This Project will see Interior Health Authority make an investment of \$100 million. (Lamb-Yorski M, 2018)
- **Spanish Mountain Copper-Gold Mines** – this proposed project is located 70 km northeast of Williams Lake (near Likely) and is an open pit mine with an expected production rate of 14.6 million tonnes/year and a ten-year mine life. The project is in the pre-application phase under the Environmental Assessment Act. The project is anticipated to cost approximately \$756 million.

A further two bioenergy projects are being explored near Anahim Lake Including:

- **Biomass Project - Anahim Lake** – A proposed biomass plant to produce in excess of 5 MW. This project has been submitted into the Sep 2010 BC Hydro Community-Based Biomass Power Call. Yun Ka Whu'ten Holdings was the developer. This project's cost was originally estimated at \$15 million.
- **Anahim Lake Bioenergy Project** – A proposed 5MW bioenergy project that would involve integrating logging waste and pine beetle infested wood from Tumbler Ridge, 100 Mile House and Cache Creek into one bio-oil production facility. The bio-oil would then be used to produce power at plants in each of the three communities. Project had been submitted into the Sep 2010 BC Hydro Community-Based Biomass Power Call, but

was not selected. Developer is exploring options for proceeding. Ainsworth Energy Co. Ltd. was the developer. This project was originally estimated at \$15 million as well.

There is one biomass project identified for Hanceville:

- **Tsilhqot'in Power Project** – A proposed 60 MW biomass thermal electric project that includes a 70 km, 230 kV transmission line. The project has been withdrawn from the Environmental Assessment process and is currently on hold. Tsilhqot'in Power Corp./Western Biomass Corp. was the developer. This had an initial estimated cost of approximately \$200 million.

There is one project identified near 108 Mile:

- **Spruce Hills Resort and Spa Expansion** – A proposed expansion to the 108 Mile Ranch health facility. Plans include development of 250 housing units and a village which would include a variety of health and wellness services. Rezoning has been approved for Comprehensive Development. Hills Health and Guest Ranch Ltd. was the developer. This project has been initially estimated at approximately \$40 million. (BCMAEST. 2018)

5 INTERNAL ASSESSMENT

5.1 INTERNAL REVIEW OF EDO DEPARTMENT

The City of Williams Lake has been engaged in Economic Development for the past several decades. Since 1999, the City has employed a full time Economic Development Officer (EDO) to assist and lead its economic development efforts. During this time, various economic development organizational models and strategies have been utilized to varying degrees of success. Changes in models and approaches have been driven by newly elected Councils with new priorities and desired outcomes.

The current configuration has the EDO reporting to the Chief Administrative Office (CAO) through to Council. From a day to day perspective, there is direct productive engagement between Council and the EDO, as well as EDO and senior staff. There are currently four priority areas of focus for the EDO and several other initiatives underway, in addition to day to day responsibilities of the position. The four priority areas are: business retention and expansion; business attraction; addressing labour market challenges; and addressing the housing shortage in the City. Other initiatives include: sub-regional tourism marketing and grant writing, and grant administration for various City departments.

5.2 INTERNAL REVIEW SUPPORTING ECONOMIC DEVELOPMENT

The City's Official Community Plan (OCP) was adopted in June 2011 and is still considered current and relevant. Specific economic development themes addressed in the OCP include:

- employment flexibility;
- conservation of employment lands;
- creating an attractive downtown; and,
- partnering with neighbouring Indigenous communities.

During 2017, City Council and staff created a Strategic Plan to 2020. There are five key pillars of focus, with growing and diversifying Williams Lake being the foundation for all pillar activities from 2017-2020. In addition, the City recently completed a more robust capital infrastructure plan for the coming years. The City's overall assessed value tax base is remaining stable with a 1.5% average annual increase from 2014-2018 (Table 26). Just over half of this increase (0.8% NMC) is the result of new construction, and the remainder is due to year over year property assessment increases. Non-market change (NMC) is defined as new construction or an assessment change due to a change in zoning or change in property class.

Table 26: Assessed Value by Property Class, 2014 and 2018

	2014	2018	Value Increase	incl. NMC	% Change	% Change	% NMC
Property Class	Revised Roll Value	Completed Roll Value	(Decrease)	(New Construction)	(2014 to 2018)	(average annual)	(average annual)
	(\$)	(\$)	(\$)	(\$)			
1-Residential	770,012,901.00	841,885,201.00	71,872,300.00	33,825,309.00	9.3%	1.9%	0.9%
2-Utilities	22,783,930.00	20,731,105.00	(2,052,825.00)	(3,414,170.00)	-9.0%	-1.8%	-3.0%
3-Supportive Housing	2.00	-	(2.00)		-100.0%	-20.0%	0.0%
4-Industry-Major	24,905,700.00	25,808,400.00	902,700.00	1,852,800.00	3.6%	0.7%	1.5%
5-Industry-Light	7,715,300.00	7,140,300.00	(575,000.00)	(487,517.00)	-7.5%	-1.5%	-1.3%
6-Business/Other	241,743,100.00	254,148,950.00	12,405,850.00	5,498,031.00	5.1%	1.0%	0.5%
7-Rec/Non-Profit	730,500.00	684,400.00	(46,100.00)	59,900.00	-6.3%	-1.3%	1.6%
8-Farm	38,620.00	40,150.00	1,530.00	1,531.00	4.0%	0.8%	0.8%
Total	1,067,930,053.00	1,150,438,506.00	82,508,453.00	37,335,884.00	7.7%	1.5%	0.8%

Source: Kozubenko, 2018 pers comm.

The City's financial department does yearly comparisons of its mill rates with 162 cities in the province. Table 27 illustrates Williams Lake's rankings across seven property classifications (1 being the highest mill rate in category).

Table 27: Property Class Tax Mill Rate Rating By Municipalities in British Columbia, 2017

Property Class	Ranking	Property Class	Ranking
Residential	28/162	Major Industry	2/162
Utilities	28/162	Light Industry	7/162
Business	51/162	Recreation	5/162
Farm	28/162		

Source: Kozubenko, 2018 pers comm.

Table 28 outlines the Major Industry Municipal Tax Rate in 2017 for the 10 municipalities with the highest major industrial tax rates in British Columbia. Overall, Williams Lake had the second highest major industry property tax rate in British Columbia in 2017 with a Tax Rate of 108.7547 (per '000 assessed value).

Table 28: Communities with Highest Major Industry Property Tax Rates in British Columbia, 2017

Municipalities	Purpose of Tax Rate	Major Industry
Cache Creek	Municipal	185.5505
Williams Lake	Municipal	108.7547
Lytton	Municipal	104.9985
Ladysmith	Municipal	103.1356
Lake Cowichan	Municipal	83.2083
Tumbler Ridge	Municipal	82.2168
Houston	Municipal	78.9361
Port Moody	Municipal	78.0150
Quesnel	Municipal	77.6060
Kamloops	Municipal	73.3400

Source:Kozubenko, 2018 pers comm.

In 2018, Williams Lake City Council passed a resolution that Council would continue to work toward lowering major industry tax rates with the goal of being out of the top 5 highest in the province by 2021.

From a fee perspective, Williams Lake is very competitive with other cities and Regional Districts in the Province – often charging comparatively the lowest or in the bottom 10% of total building/plumbing permit fees per single and multi-family detached dwellings and ancillary buildings. The latest comparisons were done in 2018 (Deane 2018, pers. comm.).

The City undertook a development cost charges (DCC) bylaw update in the spring of 2018. Relative to similar communities in the province, the City’s single and multi-family residential, commercial and industrial DCC rates compare favorably.

Processing times for development applications vary with the individuality of each application. The City’s posted processing times for Zoning Bylaw Amendments (2-4 months), Development Permits (approximately 3 months) and Subdivision Applications (1 week to 2 months) are considered favorable compared to communities similar in size.

5.3 DEVELOPER’S PERCEPTIONS

Feedback received during the construction and development focus group session and one on one discussions suggest developers are appreciative of the responsiveness and relatively quick turnaround times provided by City staff and Council with regards to inquiries and applications.

Developers also appreciate the access they have to key staff relative to their applications – something that can be difficult in larger cities. In addition, the 2016 Business Walks event did not indicate any significant “local red tape” issues, suggesting a favourable local business climate.

The findings above, as well as other services, are reflected in the “Investment Attraction Readiness Scorecard” shown here. The check list is a subjective view of Williams Lake’s investment readiness. The community appears well positioned in the Knowledge category with an

City of Williams Lake Investment Readiness Assessment Scorecard		
Sections / Categories	Score	Target Score
Section A - Knowledge		
Contacts	3	4
Land Use Planning	15	15
Engaging Businesses	3	3
Information Sources	1	0
TOTAL	22	22
Section B – Resources		
Industrial Land Inventory	6	6
Joint Ventures	1	1
Economic Development Capacity	1	3
TOTAL	8	10
Section C – Communications		
Community and Sector Profiles	7	8
Website	3	4
Other Communications	1	0
TOTAL	11	12
GRAND TOTAL	41	44

engaged sustainability planning process connecting the way forward for land development in the community. However, under resourcing, the economic development capacity does not have a long-term commitment like most communities and this creates challenges for the overall resourcing score. Finally, there is further work to do in raising communication activity to a level that enhances communications with community stakeholders, key partners and potential investors.

6 STRENGTHS, CHALLENGES, OPPORTUNITIES

Strengths, Challenges and Opportunities (SCO) analysis is a tool that helps communities identify areas of productive economic activity and wealth creation. SCO is meant to address strategically relevant issues of comparative advantage or disadvantage, which become targets for sustaining or enhancing (in the case of strengths), mitigating and converting (in the case of challenges), or developing and diversifying (in the case of opportunities).

Strengths	Challenges	Opportunities
<ul style="list-style-type: none"> • Forest cluster • Known for timber framing and log home construction hub • Natural resources (timber, minerals, water, land) • Outdoor adventure assets • Mountain bike trails - most registered in Canada • Highway, rail, air access • Education and training facilities with TRU • Business climate • Quality of life • Affordable housing and land • Local hospital • High mineral potential • People-friendly community 	<ul style="list-style-type: none"> • Lack of vision for community • Mountain pine beetle and impending timber supply decline • Lack of land for development • Potential wood processing capacity reductions • Developing destination tourism • On-going recovery from 2017 wildfres • Small local and regional markets • On-going labour shortages • Small labour and entrepreneur pool • Stigma about crime rates • Lack of broadband outside of Williams Lake 	<ul style="list-style-type: none"> • Silviculture and woodlands management • Secondary wood processing • Mining services • Capalizing on new training delivery in community • Building and diversifying the local housing stock to meet increasing demand. • Further capatalizing on natural surroundings and established tourism products • Airport development/flight school

Williams Lake and the Williams Lake Area’s greatest strengths are its natural resources, the forestry cluster that has long supported the regional economic base, transportation services and the quality of life factors, including affordable housing, that are valued by residents and newcomers. The community faces challenges due to the expected fall down in the crown timber harvest associated with the mountain pine beetle epidemic and, secondarily, recent wildfires.

Williams Lake has not experienced the forestry decline like many other regions of the province have, but future harvest reductions are inevitable and transitioning strategies will be necessary.

Investing in new housing stock, leveraging training opportunities, and addressing labour demands for specific trades and skills across the economy will be required to take advantage of new and emerging opportunities in the traditional resource sectors and the service sectors. Further, large areas of standing dead forest is a tremendous opportunity for woodlands management and services.

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APPENDIX A – SURVEY RESULTS

A.1 RESPONDENTS’ GENERAL INSIGHTS AND PREFERENCES

Looking forward five years to 2023, what is your view of the population level of Williams Lake?

As illustrated in Table 29, the majority (44%) of respondents felt the population in the City would be slightly larger, while a further 33% felt it would be similar.

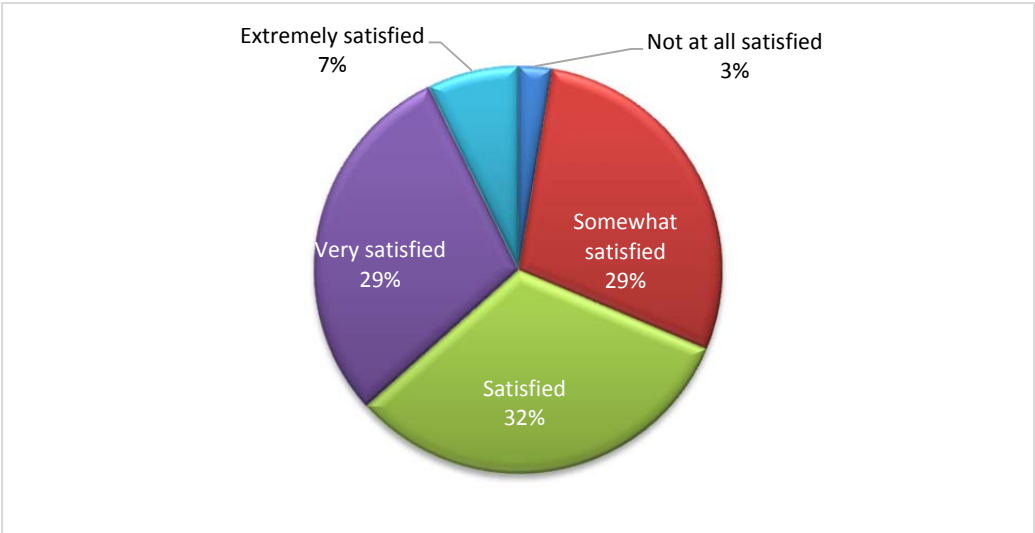
Table 29: Anticipated Population Change to 2023

Answer Choices	Number	Percentage
Population level in Williams Lake and surrounding area will be less than in 2018	33	10.9%
Population level in Williams Lake and surrounding area will be similar to that in 2018	100	33.1%
Population level in Williams Lake and surrounding area will be slightly larger than in 2018	133	44.1%
Population level in Williams Lake and surrounding area will noticeably larger than in 2018	36	11.9%
Answered	302	100.0%
Skipped	1	
Total	303	

How satisfied are you with Williams Lake and surrounding area as a place to live?

By and large, residents are satisfied with Williams Lake and Area as a place to live with 68% extremely satisfied, very satisfied or satisfied with the Area. Only 3% are not satisfied with the Area (Figure 12).

Figure 12: Satisfaction with Williams Lake and Surrounding Area as Place to Live



What amenities would you like to see in the City that would support making it a more desirable place to live?

Table 26, identifies some of the more popular amenities suggested for the community by survey respondents.

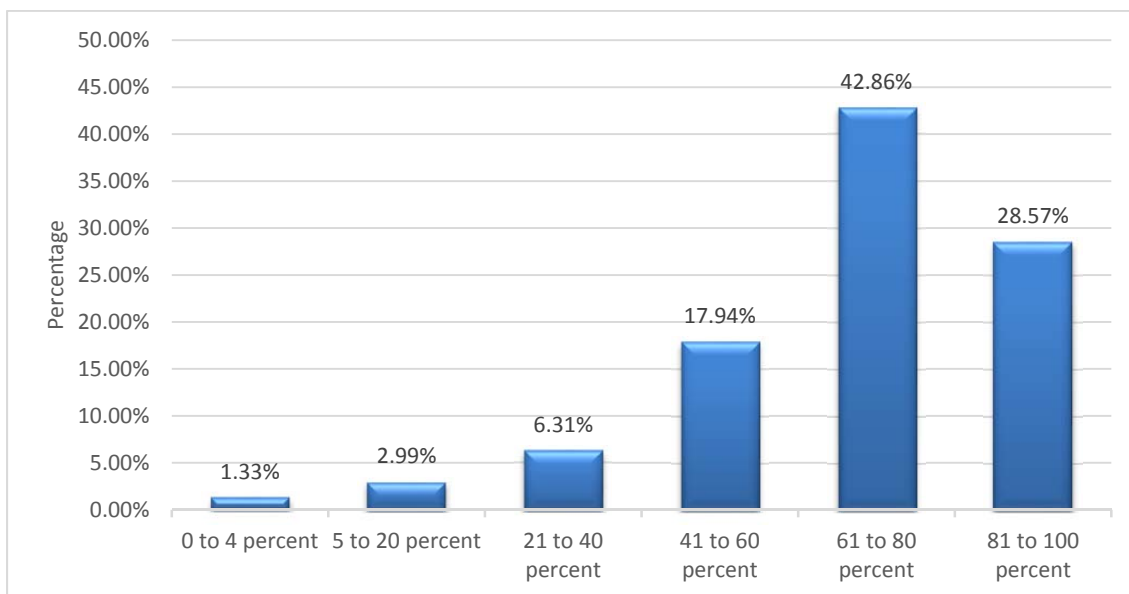
Table 30: Amenities Identified by Respondents

Bike Lanes on main roads/safer bike routes
A little higher end retail options. For any high-end furniture, clothing or décor
A Costco
More variety of shopping
A venue for music, trade fairs, conventions etc.
An indoor park or play place for small children to play in the winter
More variety of restaurants
Better developed public lake access (beyond Scout Island)
Indoor soccer dome/walking track
Complete river valley trail and more walking and biking trails, including around the lake
Brew Pub Distillery Downtown
More benches, picnic tables, lighting, gardens in the down town core
Keeping the ski hill open
Better access to Lake for all

What portion of your household purchases is made within Williams Lake?

As illustrated in Figure 13, over 28% of households purchase less than 60% of goods in Williams Lake, suggesting a fairly significant leakage from the community.

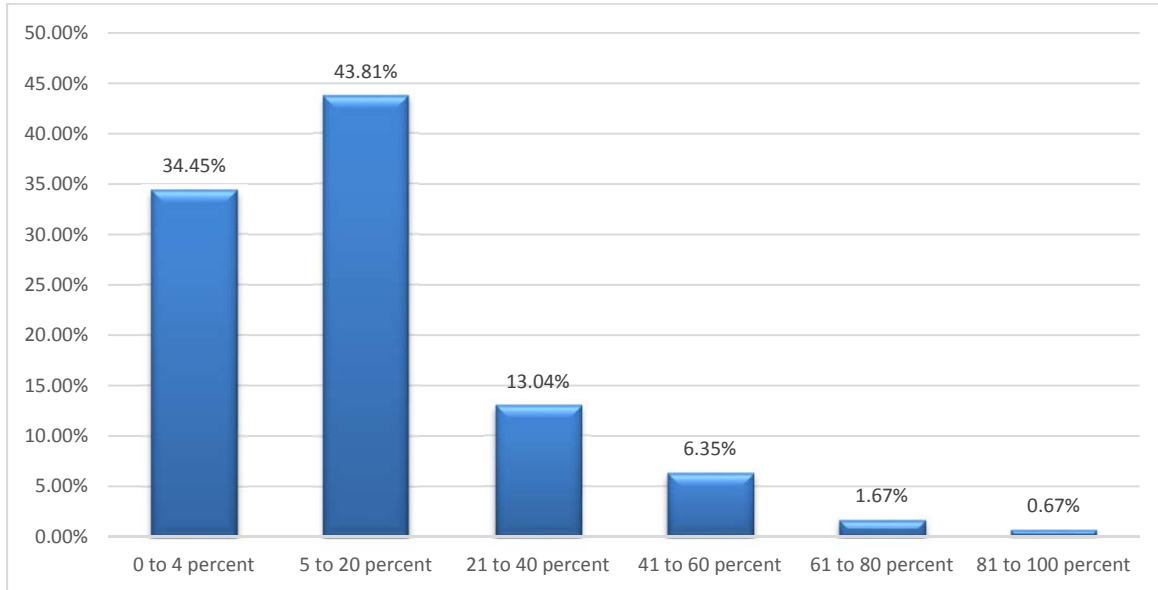
Figure 13: Household Purchases made in Williams Lake



What portion of your household purchases is made on-line?

As outlined in Figure 14, most households make less than 20% of their purchases on-line.

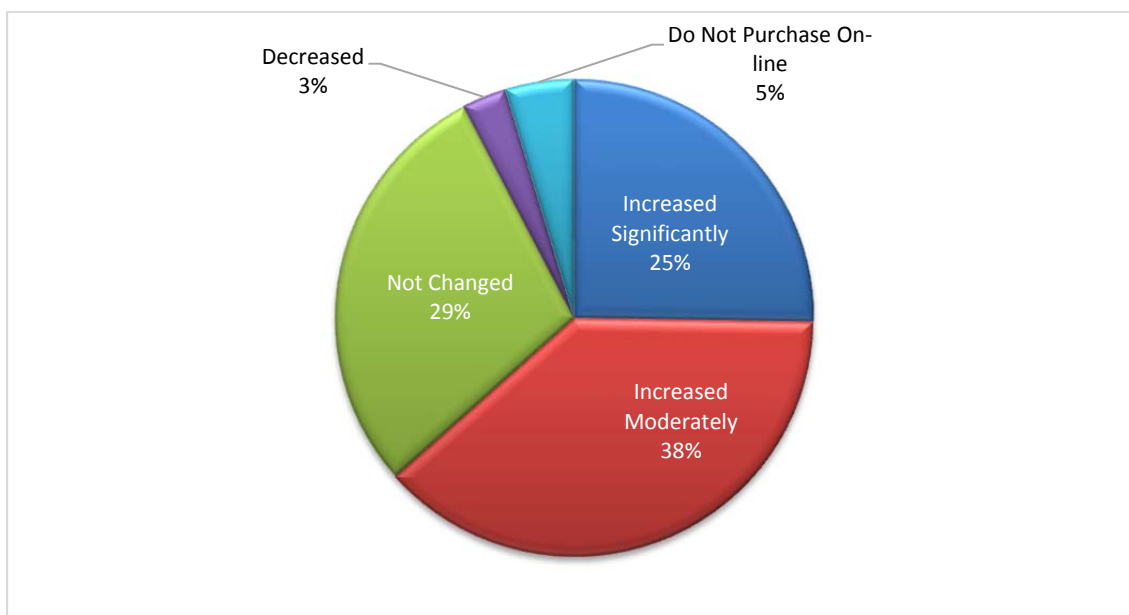
Figure 14: Household Purchases made On-line



Over the last five years how has your on-line purchases changed?

As illustrated, there has been a significant increase in on-line purchases among 25% of the respondents.

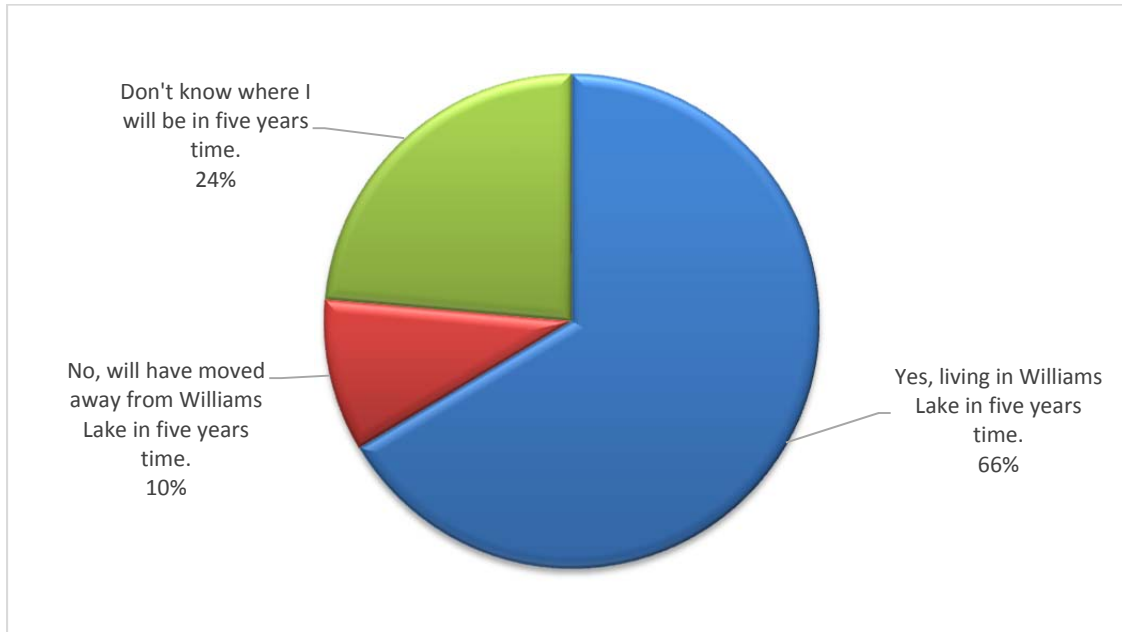
Figure 15: Change in on-line Purchases Over the Past Five Years



Do you see yourself living in Williams Lake in five years time (2023)?

As illustrated below, a full 10% of respondents plan to leave the Williams Lake Area. While a further 24% are not sure where they will reside in 5 years time.

Figure 16: Residency in Five Years Time

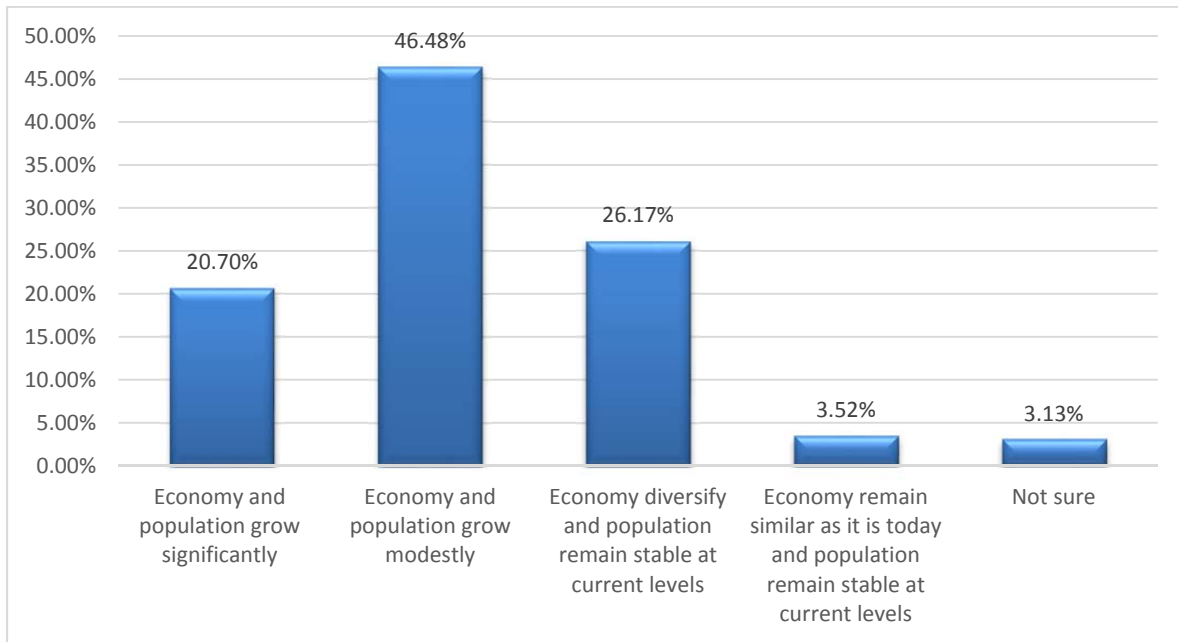


A.2 RESPONDENTS' ECONOMIC DEVELOPMENT INSIGHTS

How would you like to see the City of Williams Lake change moving forward?

As illustrated in Figure 17, almost 47% of respondents would like to see the economy and population grow modestly moving forward. Conversely, only 3.5% want to see the economy remain similar as it is today and population remain stable at current levels.

Figure 17: Respondents' Preference for the Future of Williams Lake



Which business development priorities do you feel are important for Williams Lake?

As illustrated in Table 27, respondents felt that attracting new residents and attracting businesses and entrepreneurs was the highest business development priority. However, all initiatives identified scored in a relatively similar range.

Table 31: Respondents' Preference for Business Development Priorities

	Not important		Somewhat important		Important		Very important		Extremely important		Total	Weighted Average
Attract business/entrepreneurs	1.2%	3	8.6%	22	29.8%	76	32.6%	83	27.8%	71	255	3.77
Attract new residents	4.0%	10	15.9%	40	30.6%	77	30.2%	76	19.4%	49	252	3.45
Attract skilled labour force	1.2%	3	10.4%	26	25.6%	64	35.6%	89	27.2%	68	250	3.77
Attract new public infrastructure	0.4%	1	12.0%	30	30.7%	77	33.1%	83	23.9%	60	251	3.68
Help existing businesses expand	4.4%	11	15.5%	39	35.7%	90	25.8%	65	18.7%	47	252	3.39
Assist entrepreneurs and start-ups	2.8%	7	14.7%	37	29.5%	74	33.1%	83	19.9%	50	251	3.53
Market industrial & commercial properties	6.0%	15	14.8%	37	32.8%	82	26.8%	67	19.6%	49	250	3.39
											Answered	255
											Skipped	48

Please rank the following sectors based on your view of their potential to grow the Williams Lake and surrounding area economy.

As illustrated in Table 32, respondents felt that local tourism and backcountry tourism had the best chance of growing in the future. Conversely, home based businesses, research and professionals, agri-food forestry (logging and silviculture) and mining scored among the lowest.

Table 32: Respondents' View of Growth Potential By Sector

	No potential		Some potential		Average potential		Good potential		Excellent potential		Total	Weighted Average
Agri-food processing	1.6%	4	23.0%	58	25.8%	65	42.1%	106	7.5%	19	252	3.31
Agriculture (animal and crop production)	2.4%	6	13.1%	33	30.2%	76	44.1%	111	10.3%	26	252	3.47
Alternative Energy (e.g. wave, wind, bioenergy)	6.6%	17	10.6%	27	25.5%	65	39.6%	101	17.7%	45	255	3.51
Education (private and public training institutions)	3.2%	8	12.3%	31	29.8%	75	38.1%	96	16.7%	42	252	3.53
Forestry (logging and silviculture)	5.1%	13	18.1%	46	32.3%	82	31.9%	81	12.6%	32	254	3.29
Forestry (value added and primary processing)	2.0%	5	15.1%	38	25.4%	64	39.3%	99	18.3%	46	252	3.57
Home based businesses and crafters	6.3%	16	24.0%	61	35.0%	89	26.8%	68	7.9%	20	254	3.06
Mining	8.0%	20	16.3%	41	26.3%	66	29.9%	75	19.5%	49	251	3.37
Public Sector (e.g. health and government services)	1.2%	3	11.2%	28	33.1%	83	35.5%	89	19.1%	48	251	3.6
Research and professionals	3.2%	8	17.3%	44	38.6%	98	26.8%	68	14.2%	36	254	3.31
Destination Tourism (local back country activities)	0.8%	2	7.5%	19	18.8%	48	32.5%	83	40.4%	103	255	4.04
Front country Tourism (servicing the traveling public)	1.6%	4	11.8%	30	29.9%	76	30.3%	77	26.4%	67	254	3.68
											Answered	256
											Skipped	47

Please rank the importance of the following economic development goals for the community.

Respondents’ identified building a safe and healthy community and creating sustainable employment as being the highest priority. This was followed closely by enhancing the quality of life in the community.

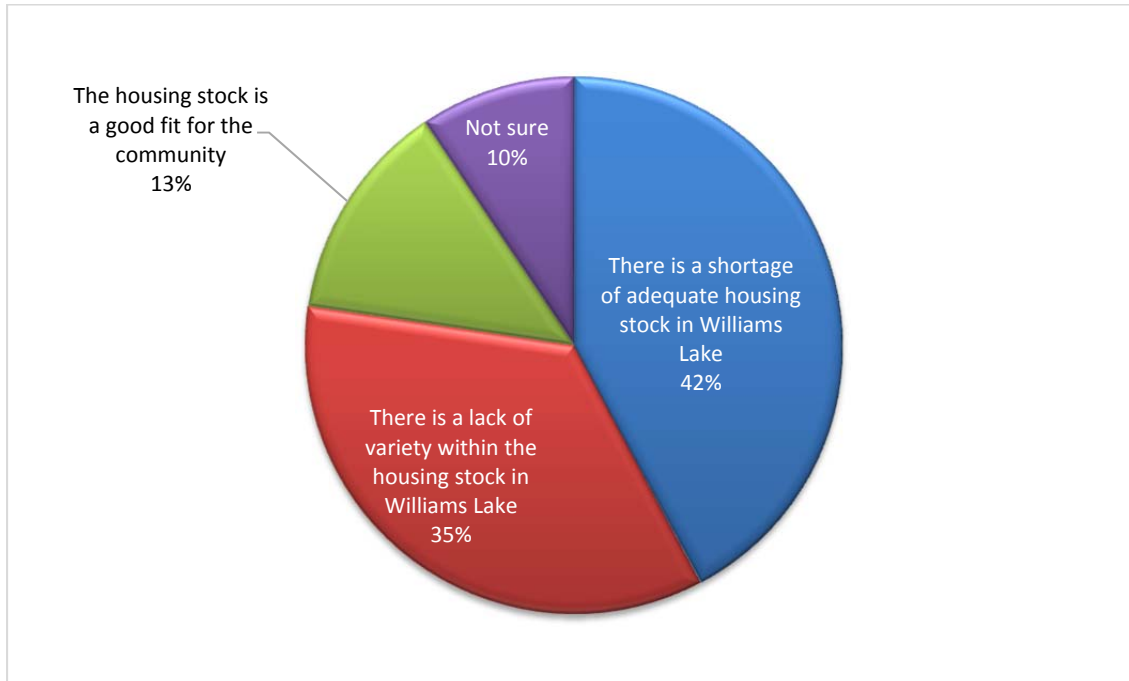
Table 33: Importance of the Following Economic Development Goals

	Not important		Somewhat important		Important		Very important		Extremely important		Total	Weighted Average
Create more local jobs	1.19%	3	5.93%	15	24.90%	63	35.18%	89	32.81%	83	253	3.92
Create sustainable employment	0.00%	0	1.96%	5	15.29%	39	36.86%	94	45.88%	117	255	4.27
Attract required labour force	0.40%	1	5.95%	15	25.00%	63	35.32%	89	33.33%	84	252	3.95
Improve household incomes	0.79%	2	8.30%	21	27.27%	69	32.81%	83	30.83%	78	253	3.85
Increase the commercial tax base	6.37%	16	13.55%	34	41.04%	103	21.12%	53	17.93%	45	251	3.31
Enhance the quality of life	0.00%	0	3.14%	8	16.47%	42	37.25%	95	43.14%	110	255	4.20
Build a safe and healthy community	0.00%	0	1.98%	5	8.30%	21	23.72%	60	66.01%	167	253	4.54
Grow the local population	5.51%	14	22.05%	56	30.71%	78	25.98%	66	15.75%	40	254	3.24
											Answered	256
											Skipped	47

Please identify what best describes your view of the current housing options available in Williams Lake?

Respondents identified a shortage of adequate housing stock (42%) and a lack of variety within the housing market (35%) when considering their options for housing in Williams Lake.

Figure 18: Respondents' View of Housing Options in Williams Lake



13 What strengths or positive factors do you see in Williams Lake that could contribute to future economic growth and diversification?

Table 34 outlines the three greatest strengths identified by respondents.

Table 34: Respondents identification of Three Greatest Strengths

Greatest Strength
<ul style="list-style-type: none"> • Access to great outdoor activities
<ul style="list-style-type: none"> • Affordable housing
<ul style="list-style-type: none"> • Beautiful area
<ul style="list-style-type: none"> • Central location in the province with rail and road access
<ul style="list-style-type: none"> • Diverse population
<ul style="list-style-type: none"> • Friendly community
<ul style="list-style-type: none"> • Forestry
<ul style="list-style-type: none"> • Mining
<ul style="list-style-type: none"> • Outdoor activities
<ul style="list-style-type: none"> • Resilience, and “get it done”, attitude.
<ul style="list-style-type: none"> • The Lake
<ul style="list-style-type: none"> • Tourism
Second Greatest Strength
<ul style="list-style-type: none"> • Agriculture
<ul style="list-style-type: none"> • Bio Fuel
<ul style="list-style-type: none"> • Business minded community members
<ul style="list-style-type: none"> • Country lifestyle with city amenities
<ul style="list-style-type: none"> • Cultural and artistic initiatives
<ul style="list-style-type: none"> • Destination for mountain biking
<ul style="list-style-type: none"> • Diverse activities available/outdoors
<ul style="list-style-type: none"> • Family orientation
<ul style="list-style-type: none"> • Proximity to natural capital (i.e. lakes, forest, and parkland)
<ul style="list-style-type: none"> • The cost of living
Third Greatest Strength
<ul style="list-style-type: none"> • Ample work
<ul style="list-style-type: none"> • Downtown is compact (walkable) and could be improved + densified (commercial)
<ul style="list-style-type: none"> • Established industrial area
<ul style="list-style-type: none"> • Great sense of community among people who have been here for a long time
<ul style="list-style-type: none"> • Room for growth

14 Do you see any weaknesses or threats that may inhibit future economic growth in Williams Lake?

Table 35 highlights the greatest weaknesses identified by respondents. While Crime was identified as the greatest weakness, it was by the far the largest weaknesses sited and occurred through the three rankings.

Table 35: Key Weaknesses Identified by Respondents

Greatest Weakness
<ul style="list-style-type: none"> • Crime • Dependency on forestry • Lack of economic diversification • Lack of education institutions (secondary) • Lack of housing variety (rental stock and housing types) • lack of rental properties • lack of skilled labour • Not diversifying our industries • Poor air quality • Wildfires
Second Greatest Weakness
<ul style="list-style-type: none"> • Lack of aggressive and progressive outlook • Lack of green planning and long-term planning • Lack of housing • Land treaties with first nations - these need to be dealt with • Not enough decent places to rent
Third Greatest Weakness
<ul style="list-style-type: none"> • Regional district/city government lack of common goals • Acceptance of change • Declining timber supply • Inability to deal with issues like homeless, crime • Lack of amenities • Lack of investment in public infrastructure projects • Lack of vision • Limited retail

Are there specific economic development opportunities or sectors that you feel Williams Lake should pursue?

Table 36 identifies a selection of economic development opportunities identified by respondents.

Table 36: Economic Opportunities Identified by Respondents

Attract a microbrewery, brew pub.
<ul style="list-style-type: none"> • A really high-end retirement complex would be a great asset.
<ul style="list-style-type: none"> • Address the crime and transients in the town core and clean up the streets. This will attract more retail and business people.
<ul style="list-style-type: none"> • Agricultural opportunities exist (greenhouse project should be aggressively sought without power plant component), and a class A slaughter house would be an economic opportunity. Never mind the alternate energy potential. The city cannot afford to seek out "outside" investment and wait on something to occur.
<ul style="list-style-type: none"> • Another city campground at the old Cottonwood site.
<ul style="list-style-type: none"> • More housing for senior citizens.
<ul style="list-style-type: none"> • Attract professionals / entrepreneurs with affordable co-work space / cheap office space.
<ul style="list-style-type: none"> • Cariboo Forest Research Institute: a place where mid-career professionals and others can come to do research or receive training on how to manage for forest resilience, wildfire recovery, develop value-added wood products manufacturing, and plan and implement non-traditional harvesting methods for accessing fibre types that would otherwise be locked-up in the mid-term.
<ul style="list-style-type: none"> • Continue to promote biking and also hiking.
<ul style="list-style-type: none"> • Make sure there are enough flights in and out of WL.
<ul style="list-style-type: none"> • Performances in the Park and the arts centre.
<ul style="list-style-type: none"> • Marijuana growing/processing; Hemp production
<ul style="list-style-type: none"> • Tourism industry, recreation planning
<ul style="list-style-type: none"> • Value added wood processing; alternative energy
<ul style="list-style-type: none"> • Expansion of university

16 If you could list only one activity, what one economic development activity do you think would make the greatest change to the economy of Williams Lake?

Table 37 outlines the priority economic development activity identified by respondents.

Table 37: Priority Economic Development Activity identified by Respondents

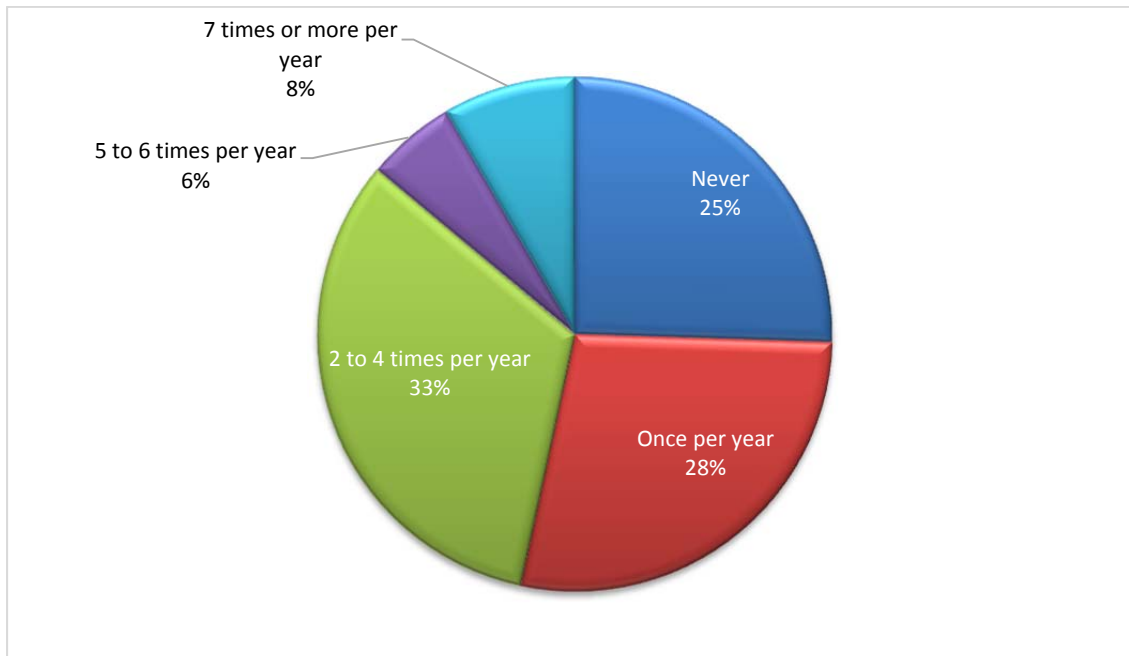
<ul style="list-style-type: none">• A hotel, marina and proper camp area on the lake
<ul style="list-style-type: none">• A large manufacturing company of some kind that would employ lots of people at high wages
<ul style="list-style-type: none">• A look at developing our Stampede grounds into a multiplex
<ul style="list-style-type: none">• A research facility in conjunction with an agricultural facility. Start with education opportunities in mind. Dollars will follow ideas.
<ul style="list-style-type: none">• Biking trails
<ul style="list-style-type: none">• Brew pub
<ul style="list-style-type: none">• Downtown shopping- really encouraging shopping there, working with BIA to build the downtown up
<ul style="list-style-type: none">• Eco tourism
<ul style="list-style-type: none">• Embracing the legalization of marijuana
<ul style="list-style-type: none">• Expanding TRU. We have a lack of skilled workers in WL - everything from office clerks to chefs to millwrights. We need more programs to train them locally.
<ul style="list-style-type: none">• Mining
<ul style="list-style-type: none">• tourism
<ul style="list-style-type: none">• Affordable housing

A.3 ABOUT THE RESPONDENTS

How often do you use the Williams Lake Regional Airport?

As illustrated, most respondents use the airport between one and four times a year. One in four never use the airport.

Figure 19: Respondents' Annual Use of the Williams Lake Airport



What best describes your participation in the labour force (include self-employment as either full-time or part-time)?

Most respondents are employed full-time (66%) while just over 16% are retired.

Table 38: Respondents' Employment Status

Answer Choices	Number	Percentage
Employed Full-time	165	66.27%
Employed Part-time	24	9.64%
Seeking Employment	4	1.61%
Student	4	1.61%
Homemaker	7	2.81%
Retired	41	16.47%
Unable to work	4	1.61%
Answered	249	
Skipped	54	
Total	303	

What is your age?

As illustrated in the Table 39, the age of most respondents was between 35 and 54 years of age.

Table 39: Age of Respondents

Answer Choices	Number	Percentage
Less than 18 years	0	0.00%
18 to 24 years	7	2.79%
25 to 34 years	46	18.33%
35 to 44 years	58	23.11%
45 to 54 years	62	24.70%
55 to 64 years	44	17.53%
65 to 74 years	27	10.76%
75 years or older	7	2.79%
Answered	251	
Skipped	52	
Total	303	

How many years have you lived in Williams Lake and area?

As illustrated, most respondents have lived in Williams Lake for more than 21 years.

Table 40: Number of Years Respondents' Have Lived in Williams Lake

Answer Choices	Number	Percentage
Less than 1 year	7	2.79%
1 to 5 years	32	12.75%
6 to 10 years	30	11.95%
11 to 15 years	18	7.17%
15 to 20 years	18	7.17%
21 years or more	146	58.17%
Answered	251	
Skipped	52	
Total	303	

Do you consider yourself a person who has "come-back" to Williams Lake, meaning did you move away for a period of time and then choose to come-back to the area?

A come-back resident is one who has moved away from Williams Lake only to return later in life. As illustrated below, approximately one-third of survey respondents identified as being come-back residents.

Figure 20: Respondents' Answer to if they are a "Come-back" resident



APPENDIX B – SURVEY QUESTIONS

- 1) The City of Williams Lake had a population of 11,420 in 2017. Looking forward five years to 2023, what is your view of the population level of Williams Lake?
- 2) How satisfied are you with Williams Lake and surrounding area as a place to live?
- 3) Please identify any amenities that you would like to see in the City that would support making it a more desirable place to live.
- 4) What portion of your household purchases is made within Williams Lake?
- 5) What portion of your household purchases is made on-line?
- 6) Over the last five years how has your on-line purchases changed?
- 7) Do you see yourself living in Williams Lake in five years time (2023)?
- 8) How would you like to see the City of Williams Lake change moving forward?
- 9) Which business development priorities do you feel are important for Williams Lake
- 10) Please rank the following sectors based on your view of their potential to grow the Williams Lake and surrounding area economy.
- 11) Please rank the importance of the following economic development goals for the community.
- 12) Please identify what best describes your view of the current housing options available in Williams Lake?
- 13) What strengths or positive factors do you see in Williams Lake that could contribute to future economic growth and diversification?
- 14) Do you see any weaknesses or threats that may inhibit future economic growth in Williams Lake?
- 15) Are there specific economic development opportunities or sectors that you feel Williams Lake should pursue?
- 16) If you could list only one activity, what one economic development activity do you think would make the greatest change to the economy of Williams Lake?
- 17) How often do you use the Williams Lake Regional Airport?
- 18) What best describes your participation in the labour force (include self-employment as either full-time or part-time)?
- 19) What is your age?
- 20) How many years have you lived in Williams Lake and area?
- 21) Do you consider yourself a person who has "come-back" to Williams Lake, meaning did you move away for a period of time and then choose to come-back to the area?
- 22) Would you like to provide your name and contact information to be entered for a prize?
- 23) Please provide your contact information to enter the draw.