Future Forward:

An Economic Development Plan for New Westminster, 2018-2023



NEW WESTMINSTER

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FUTURE FORWARD

Future Forward is a priority initiative for the City of New Westminster and reflects City Council's vision of New Westminster as a sustainable, livable and thriving community, fueled by a strong local economy and supported by active, engaged residents.



This economic development plan has been developed in consultation with the local business community with a clear purpose to both support and foster business growth. *Future Forward* establishes an overarching strategy for guiding activity of the City's Economic Development Office (EDO) that is synchronous with other City plans, policies and initiatives. It ensures New Westminster's economic development efforts remain responsive to current and future realities, leverages City initiatives, and provides a clear framework for guiding pursuit of new opportunities in Metro Vancouver's evolving economy. *Future Forward* also establishes a foundation for the City of New Westminster to effectively engage with our key economic development stakeholders and other levels of government.

While the success of local entrepreneurs and businesses is credited to hard work, perseverance and customer service, City Hall can play a vital role by fostering an environment that meets the needs of both existing and new business while enabling continued local economic growth.

As New Westminster continues to grow, it is imperative that continued proactive efforts be made to positively shape the local economic context. To do this, *Future Forward* outlines six strategies that, together, will nurture a resilient and sustainable New Westminster economy.

1. Market and promote New Westminster's competitive advantage.
2. Formalize the leadership role of the Economic Development Office as the business community's advocate at City Hall.
3. Build a fertile environment for growth and expansion of business through ongoing collaboration and engagement with key stakeholders.
4. Drive continuous innovation in delivery of city programs, projects and processes through implementation of Intelligent New West.
5. Leverage Royal Columbian Hospital expansion activities to attract and retain business, promote investment and support new employment in health care, education and tech and creative sectors.
6. Communicate to business the value proposition of locating in New Westminster.

In addition, business retention and attraction efforts will focus on the key sectors of education, healthcare, and technology and creative. These sectors all share something in common: well-paying jobs and growth potential—critical factors for business in the larger Metro Vancouver region. At the same time, the strategies and actions outlined in *Future Forward* will aid business growth in retail, arts and culture, and other important sectors that contribute to making New Westminster a great place to work, live, shop, and invest.

Finally, New Westminster's economic development efforts must fit into those of the broader regional economy. Metro Vancouver's Regional Prosperity Initiative consists of key stakeholders from municipal government, post-secondary education and the business community that are committed to improving and expanding economic growth in the region. New Westminster is proud to play a role in this initiative, and through this plan, will continue to collaborate with neighbouring municipalities and stakeholders on projects and initiatives that strengthen the regional economy.



ENGAGEMENT

An extensive consultation process was conducted to gain business community input and secure broad-based support for *Future Forward.* City Council and staff acknowledge and appreciate the insight and time contributed by the many businesses, stakeholder organizations, and committees that participated throughout the process. The following is a summary of the engagement activities that took place in the development of the plan.

Business Survey:

Mustel Group conducted a survey consisting of nearly 600 interviews with local community business owners/managers. One-on-one interviews were also conducted with senior business leaders, key business community stakeholders, and economic development partners.

Business Community Workshops:

Local business owners and managers participated in a series of focus groups held throughout New Westminster to provide input on the local business environment, interactions with City Hall and perspectives on data and information required for important business decisions.

Business Stakeholder Workshops:

Key business stakeholders including the New Westminster Chamber of Commerce, local business associations and Tourism New Westminster participated in a focus group to share their knowledge of local business strategic planning needs as well as perspectives on how the City can align economic development activities and processes to foster business success.

Economic Development Advisory Committee:

Given their advisory role to New Westminster's economic development efforts and knowledge of existing practices and initiatives, the City's Economic Development Advisory Committee was consulted through all stages of plan formulation.

Urban Development Institute Focus Group:

Due to the significant impact development has on the growth and prosperity of local economies, and given potential insights into appropriate business mix and sectors necessary to ensure community livability, members of the Urban Development Institute board and staff participated in a development community focus group to share their perspectives.

Intelligent City Knowledge Workforce Sub-committee Focus Group:

With an objective to "create sustainable program(s) to connect education with employment in the knowledge workforce economy" (City of New Westminster, 2017), a focus group was held with the ICAC Knowledge Workforce sub-committee to solicit their expertise and input.



Engagement with the local business community revealed four themes that guided the development of the goals and strategies within this plan and provided focus for specific actions. The four themes were:

- **Promotion and Marketing,**
- **Business Experience,**
- **Business Recruitment, Retention, Expansion and Economic Diversification, and**
- **Social and Livability.**

Alignment with other plans and initiatives

Future Forward establishes an overarching strategy for guiding activity of the City's EDO that is synchronous with other City plans, policies and initiatives and ensures collaboration with the same. In some cases, further details on implementation of relevant policy areas can be found in the other plans such as the Official Community Plan Employment & Economy chapter, BridgeNet and IDEA Centre Roadmap.

Taken together, these efforts are meeting with success. *Future Forward* seeks to build upon these plans and initiatives through a series of targeted strategies and actions that facilitate local economic growth and business success.

Envision 2032 | Official Community Plan | Intelligent City Strategic Plan | Regional Prosperity Initiative | Arts Strategy

Future Forward

Master Transportation Plan | IDEA Centre Roadmap | Waterfront Vision | Electrical Utility Commission Strategic Plan

ECONOMY AT A GLANCE

New Westminster, British Columbia is a historic and compact community of approximately 70,000 residents. At 15 square kilometers and located at the geographic centre of Metro Vancouver, our city is neighboured by larger municipalities that tend to overshadow the regional economic landscape (i.e. Vancouver, Burnaby, Surrey).



Economic Evolution

New Westminster's early years saw the community develop into a bustling centre of commerce on Canada's west coast. Arrival of the railway continued a pattern of industrial growth with lumber mills and manufacturing industries dotting the city's Fraser River shoreline. The vibrant commercial district in the downtown core that had flourished from the city's founding and established New Westminster as the financial, cultural and services destination of BC's lower mainland continued to thrive into the twentieth century.

While past decades have seen New Westminster's local economy endure its share of challenges, our city possesses the essential ingredients for growth due to our compact size, central location in an expanding region and ready access to rapid transit. In recent years, these factors, combined with concerted revitalization efforts, have placed New Westminster in an enviable position to harness expanded economic activity, promote existing business growth and attract new investment.

Key Employment Sectors and Current State

Between 2006 and 2016, the number of employed workers in New Westminster increased by 15.5%, from 23,465 to 27,100 (Statistics Canada, 2006 and 2016 Censuses). Over this period, change varied greatly by industry, with significant decreases in manufacturing and wholesale trade sectors and large increases in key sectors such as health care and social services. Currently, health care is the largest employment sector, with over 6,000 people employed. At the same time, professional, scientific and technical job growth has been significant, with job numbers between 2006 and 2016 increasing by 35.7%. New Westminster's creative sector also experienced significant growth over the same period at 20.5% for information and cultural industry jobs and a 44.3% for those in the arts, entertainment, and recreation sector.

Analysis, along with the local context, provides the following justification for highlighting these sectors for future growth:

- Health care and social assistance: significant increase in number of jobs, key part of local economy, well-paying stable jobs, positive growth prospects.
- Professional, scientific and technical services: positive growth prospects, well-paying jobs.
- Educational services: well-paying, stable jobs, existing concentration of education facilities.
- Creative and knowledge-based sector: positive growth prospects, well-paying jobs.

A detailed local employment sector analysis is found in Appendix A.

Demographic Snapshot

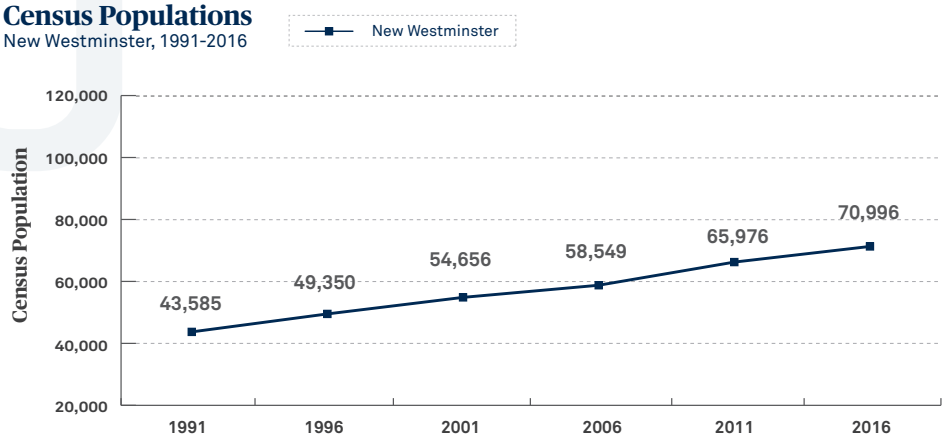
New Westminster's characteristics have shifted over the past 25 years in a number of ways. Substantial growth around the city has occurred, such as in the Downtown, Uptown and, more recently, Sapperton neighbourhoods. New Westminster's strengths can partly be attributed to its history, centrality in the region, prevalence of SkyTrain stations, and the contributions made by institutions located here, such as Douglas College, Justice Institute of British Columbia and Royal Columbian Hospital. As important, census figures provide solid proof that ours is a dynamic, multicultural, and growing city.

Population & Housing

Over the past 25 years, New Westminster has experienced steady population growth, increasing from 43,585 in 1991 to 70,996 people in 2016 (Statistics Canada, 1991 and 2016 Censuses), a growth rate of nearly 63%. This strong population growth has driven housing starts, with 12,626 new housing units added over the same period. (CMHC, Starts and Completions Survey).

Census Populations

New Westminster, 1991-2016

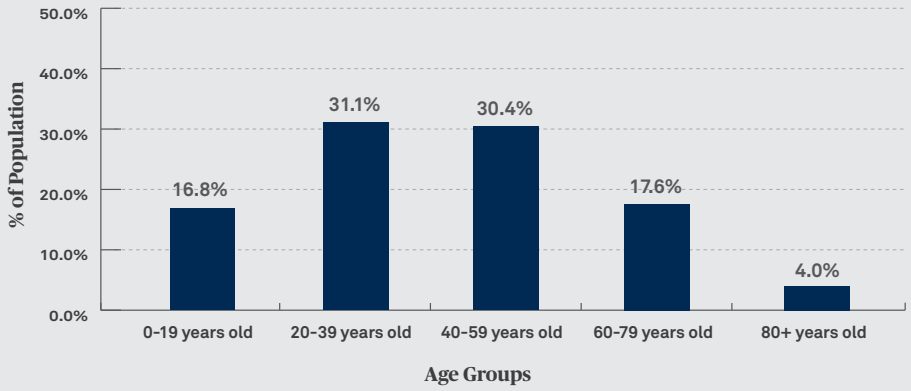






Age Distribution of Population by 20-year Age Groups

New Westminster, 2016



Age profile – In 2016, the majority of New Westminster residents were either 20-39 years old (31.1% of population) or 40-59 years old (30.4% of population). (Statistics Canada, 2016 Census).

Immigration – As of 2016, over one-third of New Westminster residents were immigrants (34.9%), with 3,500 new Canadians settling in New Westminster during the 2011-2016 period. (Statistics Canada, 2016 Census).

Income – New Westminster families have higher median before-tax incomes ($83,100/year) than for Metro Vancouver as a whole ($79,930/year). In 2015, New Westminster singles also had higher median before-tax incomes ($32,590/year) than for Metro Vancouver as a whole ($27,890/year) (Statistics Canada, 2015 Taxfiler data).

Education – Working age (25-64 years old) residents of New Westminster are well-educated, with approximately seven in ten (69.5%) having post-secondary education and more than one in three (35.6%) holding a bachelor's degree or higher level of education (Statistics Canada, 2016 Census).



Future Growth

Metro Vancouver's regional growth strategy (Metro 2040) anticipates New Westminster's population will expand to over 90,000 by 2031 and surpass 100,000 by 2041. This is consistent with the projections done by Coriolis Consulting Corporation for the City for the 2013-2041 period, as shown below. The City's Official Community Plan (OCP) seeks to manage this growth in a balanced and sustainable way.

Figure 11: New Westminster's Anticipated City-Wide Growth

Source: Coriolis Consulting Corp, City of New Westminster Urban Development Forecast – 2013-2041

Year	2013	2021	2031	2041
Total Population	68,280	79,061	92,098	103,871
Total Housing Units	31,611	36,602	42,638	48,088
Total Jobs	24,845	Not Available	Not Available	46,030

Note: Jobs discussed in this section reflect any employment position, not just full-time positions.

Employment Trends

Additional retail, office, industrial and institutional floor space city-wide will correspond with an estimated 21,000 new jobs by 2041 (Coriolis Consulting Corporation, Urban Development Forecast 2013 to 2041).

Office Floor Space – The City is forecasting close to 200,000 square metres (over 2 million square feet) of office floor space will be added locally by 2041 (Coriolis Consulting Corporation, Urban Development Forecast 2013 to 2041). Some of this floor space will be accommodated in upper floors of mixed-use buildings in Downtown, Uptown, and along transit-oriented corridors such as Twelfth Street. The majority of this new space will be accommodated in major new developments located in Sapperton Green and the Brewery District. In addition, additional office space is being encouraged within a five-minute walk of Royal Columbian Hospital to accommodate health services connected to hospital expansion activity currently underway.

Retail and Service Commercial Floor Space – New Westminster could support 65,000 square metres (approximately 700,000 square feet) of additional neighbourhood-serving retail and service space by 2041 (Coriolis Consulting Corporation, Urban Development Forecast 2013 to 2041). To ensure existing commercial nodes are supported and to avoid market dilution, the OCP has reduced the amount of land designated for retail and service commercial. This will ensure that existing commercial areas of the city remain vibrant and businesses can thrive.

Industrial Floor Space – The city could see an additional 200,000 square metres (over 2,000,000 square feet) of industrial floor space by 2041 (Coriolis Consulting Corporation, Urban Development Forecast 2013 to 2041). This increase in industrial floor space will be achieved by the protection and better utilization of existing industrial land.

Institutional Floor Space – A majority of the increase in institutional floor space is anticipated to occur through expansion of existing institutions such as Royal Columbian Hospital, the Justice Institute of BC and Douglas College. These institutions are major employers in the city and combined they are projected to add over 2,600 new jobs by 2041 (Coriolis Consulting Corporation, Urban Development Forecast 2013 to 2041).

Figure 13: Anticipated Additional Neighbourhood-Serving Retail and Service Space by Area (2011-2041)
Source: Coriolis Consulting Corp, City of New Westminster Urban Development Forecast – 2013-2041

Area	Additional Neighbourhood-Serving Retail and Service Space (2013-2041)	
The Rest of the City	25,560 sq.m.	(275,131 sq. ft.)
Downtown	28,133 sq.m.	(302,808 sq. ft.)
Queensborough	12,425 sq.m.	(133,738 sq. ft.)
City Wide	**66,118 sq.m.**	**(711,688 sq. ft.)**

Figure 14: Anticipated Additional Office Floor Space by Area (2011-2041)
Source: Coriolis Consulting Corp, City of New Westminster Urban Development Forecast – 2013-2041

Area	Additional Office Floor Space (2013-2041)	
The Rest of the City	120,203 sq.m.	(1,293,858 sq. ft.)
Downtown	47,913 sq.m.	(515,729 sq. ft.)
Queensborough	21,263 sq.m.	(228,874 sq. ft.)
City Wide	**189,379 sq.m.**	**(2,038,461 sq. ft.)**

Figure 15: Summary of Anticipated Additional Floor Space and Employment Growth (2011-2041)
Source: Coriolis Consulting Corp, City of New Westminster Urban Development Forecast – 2013-2041

Area	Additional Floor Space (2013-2041)		Employment Growth (Jobs)
Retail/Service	135,000 sq.m.	(1,500,000 sq. ft.)	4,230
Office	190,000 sq.m.	(2,000,000 sq. ft.)	11,325
Industrial	200,000 sq.m.	(2,200,000 sq. ft.)	2,945
Institutional	Not Available		2,685
City Wide	**525,000sq.m.**	**(5,800,000 sq. ft.)**	**21,185**

VISION & GOALS





VISION FOR NEW WESTMINSTER

New Westminster's OCP provides a broad framework for managing future growth and change in our community over the next 25 years. The strategies and actions outlined in *Future Forward* are consistent with OCP objectives and focus cultivating a nurturing environment for business to thrive.

The OCP's vision sees New Westminster as ***a healthy, inclusive and thriving community where people feel connected with each other. This sustainable city showcases a spectacular natural environment, public spaces and unique neighbourhoods that are well-connected and accessible. Superior urban design integrates its distinctive character, heritage assets and cultural identity. Growth and development provide a variety of services and employment opportunities that contribute to a high quality of life for all.***

OCP Economy & Employment Goal:

New Westminster has a diverse and adaptive economy and is a desirable place to work, live, shop and invest.

Guided by feedback from the local business community, City priorities and consideration of current context, New Westminster's EDO activity will pursue the following four goals:

Goal 1

Establish New Westminster's reputation as an ideal location for both start-ups and established businesses to thrive and grow.

EDO promotion and marketing efforts will focus on New Westminster's key strengths. Activities will target growth sectors, will be designed to ensure the city is well positioned to capitalize on Metro Vancouver's pull and will attract interest, investment and long-term sustainability for local business.

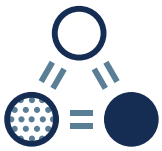
Goal 2

Drive New Westminster's commitment to delivery of a positive business experience at City Hall.

Businesses thrive on a stable, predictable business climate and successful cities require less time and energy addressing challenges presented by undue process. Through ongoing cultivation of an entrepreneur-friendly spirit at City Hall, and streamlining of processes where possible, we will create a positive environment for business to prosper and grow.



Goal 3



Secure diversity in the local economic base through recruitment, retention and expansion activities.

Business recruitment, retention, expansion and diversification are cornerstones of economic development practice. Remaining aware of the surrounding local context, economic development initiatives will be tailored to support sectoral needs, economic diversity, community desire and the ability to accommodate the growth of both established and new business.

Goal 4



Support livability initiatives that make New Westminster a great place to live, work and invest.

Great cities offer a range of housing options, recreational activities and a variety of business and employment opportunities. EDO activity will support social and livability initiatives including investments in public services and infrastructure that contribute to quality of life and make New Westminster a great place for business and their employees.



What is *Economic Development?*

Economic development in the local context can be defined as efforts designed to promote and encourage economic growth and expansion in targeted ways, ensuring a community has sustainable employment opportunities and can provide enhanced livability for its residents into the future.

THE PLAN

The work of the EDO will focus on six strategies in pursuit of our goals. Actions will concentrate on marketing and promoting the city as a place for business, solidifying key stakeholder relationships and development of collaboration initiatives while laying the foundation for continued economic growth.



Strategy 1

Market and promote New Westminster's competitive advantage.

New Westminster's central location, access to rapid transit, distinct heritage buildings, and riverfront location make us unique in the region and an attractive place for businesses and their employees. To compete in today's economy, it is important for New Westminster to highlight the very characteristics that make us competitive. At the same time, as a key player in the Metro Vancouver economy, we benefit from business growth experienced by neighbouring municipalities.

While working as a Regional Prosperity Initiative member to promote the region as a place for investment, the EDO will continue to build a strong economic development brand for New Westminster through the development of a compelling suite of economic development resources and marketing assets. Through collaboration with our business stakeholders, brand and marketing material will effectively highlight our key advantages and be designed with target sectors and evolving demographics in mind.

Also important is ensuring a supply of suitable industrial, office and retail floor space throughout the city is available, providing options to new businesses as well as existing businesses needing to expand.

The Evolution Of Retail



The face of retail is changing and the sector remains both an important component of a vibrant local economy and significant employer in New Westminster. Experiential retail - providing consumers with a positive experience or brand encounter to compel a bricks and mortar visit - is vital. The EDO will work with local business stakeholders to develop initiatives that help local retailers respond to the changing retail landscape as well as encourage residents to spend their dollars locally.

Primary Actions

a. Develop a marketing strategy that leverages New Westminster's advantages in education and health care and targets business in these growth sectors.

b. Develop a marketing strategy that targets tech and creative businesses and includes ongoing identification of businesses in these growth sectors.

c. Actively engage with key local stakeholders as well as Metro Vancouver's Regional Prosperity Initiative to ensure New Westminster's competitive advantages are promoted in regional efforts to secure investment and job growth.

d. Explore actions that respond to the need for office space in a dynamic and growing local economy, including preservation of office floor space in redevelopment scenarios.

e. Work with the Planning Division in the development of the Lower Twelfth Street Plan that facilitates the area as a creative employment zone that supports a mix of uses such as ultra light industrial, maker space, commercial, and retail.

f. Collaborate with Internet Service Providers to market BridgeNet to existing and prospective businesses, as well as property owners.

Supporting Actions

g. Collaborate with local partners on programs and initiatives that encourage residents and businesses to spend dollars locally.

h. Develop a business package that illustrates New Westminster's investment attractiveness and competitive advantage that can be used by key local stakeholders to promote the city.

i. Continue to support the tourism sector through collaboration with local organizations in the promotion of local assets including heritage, the riverfront, and arts and culture.

Strategy 2

Formalize the leadership role of the Economic Development Office as the business community's advocate at City Hall.

Time is money and no one understands this more than entrepreneurs and business owners. The City wants to support business success and the EDO has a significant role to play as the advocate for business at City Hall.

In collaboration with other City departments, the EDO will work to ease process and red tape, ensuring local businesses are able to focus efforts on their bottom line. This involves making City Hall entrepreneur-friendly through the streamlining and clarification of policies and processes, underscored by a commitment to customer service. Given the fast pace of change today, it is essential the City remains open to reviewing and responding to the evolving location and space needs of business, such as shared office space and home-based business.

As important, we will remain aware of the need to effectively engage with all audiences, whether a start-up, existing business, home-based entrepreneur, or new Canadian business owner.

Primary Actions

a. Explore a 'Business Hub' function at City Hall.

b. Conduct an audit of the City Hall customer journey and develop an associated customer service strategy for business.

c. Create a 'how-to establish a business in New Westminster' guide.

d. Work with City departments to review and revise, as necessary, business-related bylaws and policies.

Supporting Actions

e. Conduct a review and update of digital resources for prospective and existing businesses.

f. Implement quarterly meetings between city departments for continuous monitoring and improving of business-related processes.

g. Implement customer service strategy for business at City Hall.

Business Hub Concept



Many municipalities are pursuing a 'business hub' concept for establishing a positive business experience at City Hall. These one-stop assistance centres can be a valuable business tool that benefits business by eliminating frustrating referrals from one department to another in addition to time saved when procuring necessary information.




Credit: River Market

Strategy 3

Build a fertile environment for growth and expansion of business through ongoing collaboration and engagement with key stakeholders.

New Westminster offers new and existing businesses a wealth of opportunities and local stakeholders have a strong voice in how we build our economy. We recognize that collaboration is an essential ingredient for success. The EDO will continue to work with partners on local economic development efforts and promote existing and new business mentoring initiatives. Through our collaborative efforts, we enhance business attraction and retention and ensure a dynamic and diverse economic base for the future.

CNW/NWCoC Business Roundtable Series



Recently, the EDO and the New Westminster Chamber of Commerce collaborated on a business roundtable series held in commercial areas throughout the city. These meetings provided both the EDO and the Chamber with a better understanding of issues impacting local business and an opportunity to share updates on key programs and initiatives.

Primary Actions

a. Identify and engage business community stakeholders by sector for regular dialogue with the City to identify challenges and opportunities.

b. Develop a business plan that identifies opportunities for a maker-space that supports a start-up culture as well as entrepreneurs.

c. Develop an inventory of existing local businesses by sector to monitor growth and identify opportunities for retention in New Westminster.

d. Evaluate Economic Development Advisory Committee Terms of Reference to reflect support of economic development plan activity and ensure formal representation from target growth sectors.

e. Ensure BridgeNet is accessible for small and medium enterprises.

f. Administer a business survey every 3 years.

Supporting Actions

g. Support local business organizations in business mentorship and networking initiatives.

h. Facilitate the connection of businesses, organizations and stakeholders to public sector agencies, leasing agents, building owners and investors.

Strategy 4

Drive continuous innovation in delivery of City programs, projects and processes through implementation of Intelligent New West.

The Intelligent New West initiative is fostering a culture of continuous innovation through the harnessing of City-owned fibre infrastructure (BridgeNet) and an open government philosophy to enhance opportunities in the digital economy. *Future Forward* recognizes the positive impact that innovation and technology has on local economies. New Westminster's EDO will continue to play an integral part in the development and implementation of Intelligent New West initiatives, growing our employment base, improving access to digital tools and solutions and increasing opportunities for business.

Primary Action

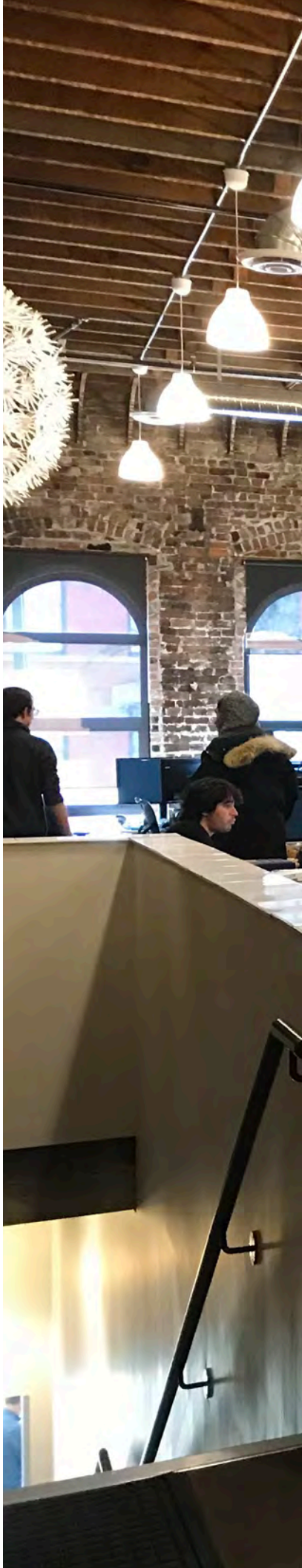
a. Collaborate on the updating and implementation of the Intelligent New West Strategy.

Supporting Action

b. Work with city departments to incorporate digital solutions that drive operational efficiencies.

BridgeNet

The City is investing in the digital economy with BridgeNet, a high-speed fibre network stretching from one end of the city to the other. Connecting commercial districts and many of New Westminster's multi-unit residential buildings, BridgeNet provides greater access and accessibility to high-speed internet services by facilitating a broader range of choice of Internet Service Providers. Through BridgeNet, New Westminster aims to attract more innovative companies and knowledge workers to the city and provide existing businesses with a competitive advantage in today's digital economy.









Strategy 5

Leverage Royal Columbian Hospital expansion activity to attract and retain business, promote investment and support new employment in health care, education and tech and creative sectors.

Healthcare is an important economic sector in New Westminster with Royal Columbian Hospital (RCH), the city's largest employer and a major healthcare anchor within the region. Through operating expenditures, visitor spending and investments in research, RCH generates an annual economic output of $66 million in New Westminster and $495 million across British Columbia.

IDEA Centre is an initiative being developed in concert with RCH expansion and redevelopment activity currently underway in order to create expanded economic opportunity in the Sapperton business area that surrounds the hospital and elsewhere in New Westminster. The IDEA Centre Roadmap provides a clear vision and actions for regional partners to drive health-related economic development in the city while promoting cost efficiencies and successful clinical outcomes within RCH and Fraser Health. Work includes connecting with other regional partners, such as Surrey's Innovation Boulevard, post-secondary institutions, research and development organizations and businesses and with City-owned assets, such as the Sapperton District Energy System and BridgeNet.

Primary Action

a. Collaborate with stakeholders, including post-secondary institutions, Fraser Health, and local developers to implement the IDEA Centre strategy and road map.

Strategy 6

Communicate to business the value proposition of locating in New Westminster.

What gets measured gets done. To build success and stay on course with *Future Forward* goals and strategies we must understand and measure our progress on the actions outlined. Through a commitment to continual review, revision and improvement of our approach as necessary, we will ensure optimization of EDO resources and outcomes.

Primary Actions

a. Develop a public communication piece that highlights Economic Development Plan strategy action items and implementation progress.

b. Work with the Economic Development Advisory Committee to determine appropriate baseline metrics for evaluating economic development plan progress and develop dashboard for tracking the same.

c. Provide regular update reports to the Economic Development Advisory Committee and City Council on economic development plan progress and metrics.




DOWNTOWN
NEW WESTMINSTER
Fridays on Front

APPENDIX A:
SECTORAL ANALYSIS



Economic Strategy - Sectoral Analysis

Change in number of workers by industry, employed workers working in New Westminster, 2006-2016

The number of employed workers working in New Westminster (regardless of municipality of residence) increased from 23,465 in 2006 to 27,100 in 2016, an increase of 3,635 employed workers (an 15.5% increase)**(Table 1)**. There were large decreases in some goods industries such as manufacturing (a decrease of -1,375 employed workers) and wholesale trade (-260) and large increases in some service industries such as health care and social assistance (an increase of +965 employed workers), retail trade (+910), accommodation and food services (+815) and professional, scientific and technical services (+505). There was also a large increase in transportation and warehousing (+725).

Health care and social assistance (6,270 employed workers), retail trade (3,170), accommodation and food services (2,425) and education services (2,205) were the four largest sectors in 2016. Health care and social assistance, manufacturing, retail trade, and educational services were the four largest sectors in 2006.

Table 1: Number of employed workers working in New Westminster (regardless of municipality of residence), by industry sector (2-digit NAICS 2012), 2006 and 2016[i,ii]

Industry	Number of workers, 2006	Number of workers, 2016	# change in number of workers, 2006-2016	% change in number of workers, 2006-2016
Total employed workers	**23,465**	**27,100**	**3,635**	**15.5%**
11 Agriculture, forestry, fishing and hunting	120	105	-15	-12.5%
21 Mining and oil and gas extraction	0	20	20	n/a
22 Utilities	50	0	-50	-100.0%
23 Construction	805	755	-50	-6.2%
31-33 Manufacturing	2,475	1,100	-1,375	-55.6%
41 Wholesale trade	815	555	-260	-31.9%
44-45 Retail trade	2,260	3,170	910	40.3%
48-49 Transportation and warehousing	895	1,620	725	81.0%
51 Information and cultural industries	440	530	90	20.5%
52 Finance and insurance	1,150	1,020	-130	-11.3%
53 Real estate and rental and leasing	515	715	200	38.8%
54 Professional, scientific and technical services	1,415	1,920	505	35.7%
55 Management of companies and enterprises	20	15	-5	-25.0%
56 Administrative and support, waste management and remediation services	475	925	450	94.7%
61 Educational services	2,080	2,205	125	6.0%
62 Health care and social assistance	5,305	6,270	965	18.2%
71 Arts, entertainment and recreation	485	700	215	44.3%
72 Accommodation and food services	1,610	2,425	815	50.6%
81 Other services (except public administration)	1,105	1,285	180	16.3%
91 Public administration	1,415	1,760	345	24.4%

It is also worth noting that employed workforce for place-of-work information was only available for workers who had a fixed place of work (e.g., office, store, school, etc.) or worked from home and not for workers who had no fixed workplace location (e.g., work on different construction sites). Therefore, the numbers of employed workers who worked in New Westminster at the time of the long-form Censuses in 2006 and 2016 shown in the data represent underestimates of the total number of employed workers who worked in New Westminster at these times. These underestimates were probably larger for industries in which a large proportion of employed workers had no fixed workplace location, such as the construction industry, the transportation and warehousing industry and the administrative and support, waste management and remediation services industry.

Employed workers working in New Westminster and Metro Vancouver, by industry, 2016

In 2016, the predominance of industry sectors for the employed workforce that worked in New Westminster (regardless of municipality of residence) were somewhat different from Metro Vancouver as a whole **(Table 2)**. The health care and social assistance sector (23.1% in New Westminster – 11.2% in Metro Vancouver = +11.9% difference) and the public administration sector (6.5% in New Westminster – 4.5% in Metro Vancouver = +2.0% difference) composed much higher proportions of all workers who worked in New Westminster than in Metro Vancouver. Conversely, the professional, scientific and technical services sector (7.1% in New Westminster – 10.6% in Metro Vancouver = -3.6% difference), the manufacturing sector (4.1% in New Westminster – 7.1% in Metro Vancouver = -3.0% difference) and wholesale trade (2.0% in New Westminster – 4.5% in Metro Vancouver = -2.5% difference) all had considerably smaller proportions of all workers who worked in New Westminster than in Metro Vancouver.

The health care and social assistance sector employed one in four workers who worked in New Westminster (23.1% of employed workers who worked in New Westminster), followed by retail trade (11.7%), accommodation and food services (8.9%) and educational services (8.1%). Retail trade had the highest proportion of all employed workers (12.3% of employed workers who worked in Metro Vancouver) who worked in Metro Vancouver, followed by health care and social assistance (11.2%), professional, scientific and technical services (10.6%) and accommodation and food services (9.0%).

These employed worker statistics were calculated based on place of work for employed workers with a usual place of work (e.g., worked in an office or a store) or who worked from home. Therefore, industries with high proportions of employed workers working at no fixed workplace (e.g., construction industry) would likely have been underrepresented as their proportion of the employed workforce working in New Westminster and Metro Vancouver.



Table 2: Number of employed workers working in New Westminster and Metro Vancouver (regardless of municipality or region of residence), by industry sector (2-digit NAICS 2012), 2016[iii,iv]

Industry	New Westminster		Metro Vancouver		Difference in percentage of workers by industry, New Westminster - Metro Vancouver
	Number of workers	% of workers	Number of workers	% of workers	
Total employed workers	**27,100**	**100.0%**	**1,111,450**	**100.0%**	**0.0%**
11 Agriculture, forestry, fishing and hunting	105	0.4%	9,025	0.8%	-0.4%
21 Mining and oil and gas extraction	20	0.1%	3,220	0.3%	-0.2%
22 Utilities	0	0.0%	6,255	0.6%	-0.6%
23 Construction	755	2.8%	42,260	3.8%	-1.0%
31-33 Manufacturing	1,100	4.1%	78,570	7.1%	-3.0%
41 Wholesale trade	555	2.0%	49,995	4.5%	-2.5%
44-45 Retail trade	3,170	11.7%	136,750	12.3%	-0.6%
48-49 Transportation and warehousing	1,620	6.0%	54,830	4.9%	1.0%
51 Information and cultural industries	530	2.0%	39,605	3.6%	-1.6%
52 Finance and insurance	1,020	3.8%	60,710	5.5%	-1.7%
53 Real estate and rental and leasing	715	2.6%	30,125	2.7%	0.1%
54 Professional, scientific and technical services	1,920	7.1%	118,240	10.6%	-3.6%
55 Management of companies and enterprises	15	0.1%	2,990	0.3%	-0.2%
56 Administrative and support, waste management and remediation services	925	3.4%	38,080	3.4%	0.0%
61 Educational services	2,205	8.1%	87,625	7.9%	0.3%
62 Health care and social assistance	6,270	23.1%	124,530	11.2%	11.9%
71 Arts, entertainment and recreation	700	2.6%	25,800	2.3%	0.3%
72 Accommodation and food services	2,425	8.9%	100,195	9.0%	-0.1%
81 Other services (except public administration)	1,285	4.7%	53,100	4.8%	0.0%
91 Public administration	1,760	6.5%	49,550	4.5%	2.0%

Employed workers living in New Westminster and Metro Vancouver, by industry, 2016

Employed workers by place of residence (regardless of municipality or region of work) **(Table 3)** presented a different industry pattern than employed workers by place of work (regardless of municipality of residence). In 2016, by place of residence, the pattern of employed workers by industry was fairly similar in New Westminster to Metro Vancouver, with all of the industry sectors falling within a similar proportion (+/- 2.0% difference) in Metro Vancouver and New Westminster. This differed from the place of work analysis, where there were large differences in industry proportions between New Westminster and Metro Vancouver, especially in the health care and social assistance sector.

In 2016, the largest proportion of employed workers living in New Westminster worked in health care and social assistance (11.7% of employed workers who lived in New Westminster), followed by retail trade (10.2%), professional, scientific and technical services (9.7%) and educational services (7.6%). In 2016, the largest proportion of employed workers living in Metro Vancouver worked in retail trade (11.2% of employed workers who lived in Metro Vancouver), health care and social assistance (10.5%), professional, scientific and technical services (10.0%) and accommodation and food services (8.3%).

Unlike the industry analysis by place of work, which was only able to tabulate employed workers with a usual place of work and employed workers working from home, the industry analysis by place of residence was based upon employed workers with a usual place of work, employed workers working from home, employed workers working overseas and employed workers with no fixed workplace location. As a result, the number of employed workers captured by the place of residence analysis was much larger than by the place of work analysis for both New Westminster and Metro Vancouver. This was especially notable for industry sectors with a high number of no fixed workplace jobs, such as the construction sector, the transportation and warehousing sector, and the administrative and support, waste management and remediation services sector.

Table 3: Number of employed workers living in New Westminster and Metro Vancouver (regardless of municipality or region of work), industry by industry sector (2-digit NAICS 2012), 2016[v,vi]

Industry	New Westminster		Metro Vancouver		Difference in percentage of residents in each industry, New Westminster - Metro Vancouver
	Number of residents employed in industry	% of residents in industry	Number of residents employed in industry	% of residents in industry	
Total resident employed workers	**40,405**	**100.0%**	**1,276,900**	**100.0%**	**0.0%**
11 Agriculture, forestry, fishing and hunting	170	0.4%	11,075	0.9%	-0.4%
21 Mining and oil and gas extraction	110	0.3%	4,000	0.3%	0.0%
22 Utilities	325	0.8%	6,700	0.5%	0.3%
23 Construction	2,885	7.1%	93,585	7.3%	-0.2%
31-33 Manufacturing	2,495	6.2%	80,925	6.3%	-0.2%
41 Wholesale trade	1,785	4.4%	53,755	4.2%	0.2%
44-45 Retail trade	4,140	10.2%	143,140	11.2%	-1.0%
48-49 Transportation and warehousing	2,260	5.6%	72,410	5.7%	-0.1%
51 Information and cultural industries	1,785	4.4%	47,575	3.7%	0.7%
52 Finance and insurance	1,810	4.5%	63,645	5.0%	-0.5%
53 Real estate and rental and leasing	945	2.3%	34,635	2.7%	-0.4%
54 Professional, scientific and technical services	3,925	9.7%	127,865	10.0%	-0.3%
55 Management of companies and enterprises	105	0.3%	3,055	0.2%	0.0%
56 Administrative and support, waste management and remediation services	2,080	5.1%	57,545	4.5%	0.6%
61 Educational services	3,090	7.6%	96,385	7.5%	0.1%
62 Health care and social assistance	4,715	11.7%	134,215	10.5%	1.2%
71 Arts, entertainment and recreation	835	2.1%	29,720	2.3%	-0.3%
72 Accommodation and food services	2,900	7.2%	105,715	8.3%	-1.1%
81 Other services (except public administration)	1,910	4.7%	58,435	4.6%	0.2%
91 Public administration	2,130	5.3%	52,515	4.1%	1.2%

Ten most common industry subsectors for employed workers living in New Westminster, 2011

Drilling into more detailed industry subsectors provided additional information into the types of industry that New Westminster employed residents worked in. In 2011, 7 out of 102 industry sub sectors had 1,000 or more employed workers living in New Westminster **(Table 4)**. Professional, scientific and technical services (3,360 employed workers) and educational services (2,735 employed workers) had much larger numbers of employed workers who lived in New Westminster than other industry subsectors.

Table 4: Ten most common industry sub-sectors (3-digit NAICS 2007), by number of employed workers living in New Westminster (regardless of municipality of work), by industry, 2011[vii,viii]

Industry	Number of employed residents working in industry
541 Professional, scientific and technical services	3,360
611 Educational services	2,735
722 Food services and drinking places	1,860
238 Specialty trade contractors	1,855
561 Administrative and support services	1,745
621 Ambulatory health care services	1,515
622 Hospitals	1,340
913 Local, municipal and regional public administration	910
813 Religious, grant-making, civic, and professional and similar organizations	860
445 Food and beverage stores	815



Job quality of New Westminster residents' ten most common industry subsectors, Metro Vancouver level job quality data, 2015

The total number of jobs for New Westminster residents in a particular subsector only tells part of the industry story; it is also important to consider the quality of the jobs offered. Although measuring job quality is a subjective process (what makes a job a good job varies depending on the views of the person who is working at the job, etc.), two measures somewhat capture job quality:

1. Percentage of workers working full time (30 hours or more per week) and full year (49 to 52 weeks a year, which is inclusive of vacation time, sick leave etc.)
2. Median before-tax employment income for these full time, full year workers

These indicators emphasize the monetary aspects of job quality, which are not the only job quality factors, but are important in a region such as Metro Vancouver with a high cost of living. Workers who work full time for a full year will generally work more hours than other workers, which typically contributes to higher incomes for these full time, full year workers relative to workers as a whole. Examining before-tax employment income for full time full year workers instead of just all workers allows for more consistent comparisons of earnings based on a relatively similar base of time worked.

Metro Vancouver level data on job quality was used for the ten largest industry sub-sectors for New Westminster residents, as New Westminster level data was not available.

Just under half of all workers in Metro Vancouver in 2015 worked full time and full year (48.1% of all workers worked full time and full year) **(Table 5)**. This fairly low proportion was likely due to several factors:

a. Some workers changed jobs during the year, with sometimes a month or more of time between jobs
b. Some workers experienced periods of unemployment during the year
c. Some workers may have been students for part of the year and then worked after graduation
d. Many workers worked part time

Half or more of all workers in the local, municipal and regional public administration (61.6% of workers worked full time full year), professional, scientific and technical services (55.0%), religious, grant-making, civic and professional and similar organizations (50.9%) and hospitals (50.0%) worked full time full year in 2015.

The median full time, full year employment income (before tax) for workers in Metro Vancouver in 2015 was $54,955, with the highest incomes among the selected sub-sectors being for local, municipal and regional public administration ($78,995), hospitals ($69,529), professional, scientific and technical services ($66,043) and educational services ($64,755).

Table 5: Job quality statistics (% of workers working full time, full year and median full time, full year employment income) for selected industry sub-sectors, Vancouver CMA, 2015 (based on 2016 Census)[ix,x]

Industry	% of workers working full-year, full-time	Median full-time, full-year employment income (before-tax)
Total employed workers	**48.1%**	**$54,955**
238 Specialty trade contractors	49.5%	$52,401
445 Food and beverage stores	36.7%	$40,004
541 Professional, scientific and technical services	55.0%	$66,043
561 Administrative and support services	40.6%	$39,321
611 Educational services	43.0%	$64,755
621 Ambulatory health care services	41.9%	$54,331
622 Hospitals	50.0%	$69,529
722 Food services and drinking places	27.9%	$26,895
813 Religious, grant-making, civic, and professional and similar organizations	50.9%	$58,435
913 Local, municipal and regional public administration	61.6%	$78,995

Projected employment growth, by industry sector, British Columbia, 2016-2025

To this point, this sector analysis has focused on analysis of statistics from the past (2006 and 2011). It is also important to investigate industry prospects for the future in a sectoral analysis, to see which industries will grow and which industry will shrink. WorkBC produced an industry growth job projection document for British Columbia as a whole from 2016-2025, which projects the number of jobs to be added through expansion.

In 2016, British Columbia had an estimated 2,332,100 jobs **(Table 6)**. Between 2016 and 2025, a total of 291,900 jobs are projected to be added through expansion, representing a job growth rate of 12.5%. The job growth will not be evenly spread throughout industries. In general, service industries are expected to see much stronger growth than goods industries, which are expected to see slow growth or decline. In terms of the total number of jobs, the health care and social assistance sector (66,000 new jobs through expansion), the professional services sector (46,800 new jobs through expansion) and the retail trade sector (42,500 new jobs through expansion) are expected to see the greatest growth between 2016 and 2025 in British Columbia.

It is worth noting that these projections are for British Columbia as a whole and not for Metro Vancouver or New Westminster. Local projects (such as the expansion of the Royal Columbian Hospital) may lead to a stronger rate of growth in certain industries in New Westminster than for British Columbia as a whole during this period. Also, the projections do not denote how many of the jobs created through expansion will be full time full year jobs, which presumably will vary by industry.

Table 6: Projected employment growth by expansion, by industry, British Columbia, 2016-2025[xi,xii]

Industry	2016 number of jobs	Total job openings through expansion, 2016-2025	% growth rate, total job openings through expansion, 2016-2025
All industries	**2,332,100**	**291,900**	**12.5%**
Agriculture and primary	70,800	2,200	3.1%
Utilities	14,400	-100	-0.7%
Construction	207,400	15,200	7.3%
Manufacturing	175,200	900	0.5%
Wholesale trade	83,200	9,400	11.3%
Retail trade	269,900	42,500	15.7%
Transportation, warehousing and storage	138,500	10,100	7.3%
Information and culture	56,100	12,500	22.3%
Finance, insurance and real estate	129,800	16,400	12.6%
Professional services	281,700	46,800	16.6%
Education	167,800	17,100	10.2%
Health and social assistance	293,400	66,000	22.5%
Arts, recreation and hospitality	241,800	38,400	15.9%
Other private services	104,400	3,200	3.1%
Government	97,700	11,400	11.7%


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Sources

i Sources: 2006 data - Statistics Canada. Place of Work Status (3), Industry - North American Industry Classification System (21) and Work Activity (4) for Employed Labour Force 15 Years and Over Having a Usual Place of Work or Working at Home, for Canada and for Provinces, Territories, Census Divisions and Census Subdivisions of Work, 2006 Census - 20% Sample Data.

2016 data: Statistics Canada. Place of Work Status (3), Industry - North American Industry Classification System 2012 (21) and Work activity during the reference year (4) for the Employed Labour Force 15 Years and Over Having a Usual Place of Work or Working at Home, in Private Households, for Canada, Provinces, Territories, Census Divisions and Census Subdivisions of Work, 2016 Census - 25% Sample Data

ii Worker by municipality of work information is based on workers who worked in New Westminster (regardless of which municipality they resided in). Workers who worked in New Westminster data was only available for workers who worked at a usual place of work or work from home. Workers who did not have a fixed workplace address were not included in place of work analysis from Statistics Canada. Therefore, these worker numbers were underestimates of the number of people working in New Westminster. These worker numbers probably especially underestimated the number of workers who work in New Westminster for the following industries (which tend to have a lot of workers with no fixed workplace): 23 Construction, 48-49 Transportation and warehousing and 56 Administrative and support, waste management and remediation services. Worker numbers by place of work information only included employed workers. Industries are based on two-digit industry classifications from North American Industry Classification System 2012 (NAICS 2012). For more information on NAICS 2012, please review the Statistics Canada. North American Industry Classification System (NAICS) 2012 website:

https://www.statcan.gc.ca/eng/subjects/standard/naics/2012/index

For more information on the 2006 Census, please visit Statistics Canada. 2006 Census.

https://www12.statcan.gc.ca/census-recensement/2006/index-eng.cfm

For more information on the 2016 Census, please visit Statistics Canada, 2016 Census.

https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/index-eng.cfm

iii Source: Statistics Canada. Place of Work Status (3), Industry - North American Industry Classification System 2012 (21) and Work activity during the reference year (4) for the Employed Labour Force 15 Years and Over Having a Usual Place of Work or Working at Home, in Private Households, for Canada, Provinces, Territories, Census Divisions and Census Subdivisions of Work, 2016 Census - 25% Sample Data

iv Worker by municipality of work information is based on workers who worked in New Westminster (regardless of which municipality they resided in), or in the case of Metro Vancouver data, workers who worked in Metro Vancouver (regardless of which region they resided in). Workers who worked in New Westminster data was only available for workers who worked at a usual place of work or work from home. Workers who did not have a fixed workplace address were not included in place of work analysis from Statistics Canada. Therefore, these worker numbers were underestimates of the number of people working in New Westminster.

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https://www.statcan.gc.ca/eng/subjects/standard/naics/2012/index

v Source: Statistics Canada. Place of Work Status (7), Industry - North American Industry Classification System 2012 (21) and Work activity during the reference year (4) for the Employed Labour Force 15 Years and Over, in Private Households of Canada, Provinces and Territories, Census Divisions and Census Subdivisions, 2016 Census - 25% Sample Data.

vi Employed workers were based on living in New Westminster and Metro Vancouver (place of residence), regardless of which municipality they worked in, or in the case of Metro Vancouver, which region they worked in. Employed workers by place of residence included persons working from home, from a usual place of work, overseas and at no fixed location. Industries are based on two-digit industry classifications from North American Industry Classification System 2012 (NAICS 2012). For more information on NAICS 2012, please review the Statistics Canada. North American Industry Classification System (NAICS) 2012 website:

https://www.statcan.gc.ca/eng/subjects/standard/naics/2012/index

vii Source: Statistics Canada. EO2397 Tb 16 (UID 377) CDCSD - Industry - North American Industry Classification System (NAICS) 2007 (425) and income in 2010 (34), for the employed labour force aged 15 years and over in private households of Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2011 National Household Survey

viii Employed workers were based on living in New Westminster (place of residence), regardless of which municipality they worked in. Employed labour force by place of residence included persons working from home, from a usual place of work, overseas and at no fixed location. Industries are based on three-digit industry classifications from North American Industry Classification System 2007 (NAICS 2007). For more information on NAICS 2007, please review the Statistics Canada. North American Industry Classification System (NAICS) 2007 website:

http://www.statcan.gc.ca/eng/subjects/standard/naics/2007/index

As there are 102 subsectors classified in the three-digit codes, only the top three-digit codes could be chosen. The top three-digit codes for New Westminster were based on the number of employed workers for each code who resided in New Westminster. Data from 2016 for subsector employment for New Westminster residents was not available, so 2011 data was used.

ix Source: Statistics Canada. Catalogue no. 99-014-X2011044. Employment Income Statistics in 2010 (7), Sex (3), Work Activity in 2010 (3), Highest Certificate, Diploma or Degree (6) and Industry - North American Industry Classification System (NAICS) 2007 (104) for the Population Aged 15 Years and Over in Private Households of Canada, Provinces and Territories, 2011 National Household Survey.

x Industries are based on two-digit industry classifications from North American Industry Classification System 2012 (NAICS 2012).

For more information on NAICS 2012, please review the Statistics Canada. North American Industry Classification System (NAICS) 2012 website:

https://www.statcan.gc.ca/eng/subjects/standard/naics/2012/index

Median, full time, full year employment income and % of jobs that are full year and full time were based on Metro Vancouver level data, as this data was not available for New Westminster. "The term 'full-year full-time workers' refers to persons aged 15 years and over who worked 49 to 52 weeks mostly full time in 2015 for pay or in self-employment." Weeks worked "includes weeks of paid vacation, weeks on sick leave with pay and weeks in which training was paid for by the employer." Full-time work refers to " whether the weeks worked during the reference year were full-time weeks (30 hours or more per week) or not, on the basis of all jobs held. Persons with a part-time job for part of the year and a full-time job for another part of the year were to report the information for the job at which they worked the most weeks." For more information on work activity, please visit Statistics Canada. Dictionary, Census of Population, 2016. Work activity during reference year:

http://www12.statcan.gc.ca/census-recensement/2016/ref/dict/pop224-eng.cfm

As there are 102 subsectors classified in the three-digit codes, only the top three-digit codes could be chosen.

The top three-digit codes for New Westminster were based on the number of employed workers for each code who resided in New Westminster in 2011.

xi Source: WorkBC. British Columbia 2025 Labour Market Outlook. (p.18)

https://www.workbc.ca/getmedia/00de3b15-0551-4f70-9e6b-23ffb6c9cb86/LabourMarketOutlook.aspx

xii The categories included in the WorkBC. Labour Market Outlook are similar to the North American Industry Classification System 2-digit codes, but with some consolidations (e.g., agriculture is mixed in with forestry and mining). Therefore, while the NAICS 2007 2-digit codes include 20 industries ('sectors'), WorkBC's outlook includes 15 industries. These projections do not include whether or not these jobs will be full time or part time or full year or part year.


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