

Capital Regional District 2019-2038 Population, Dwelling Units and Employment Projection Report

PREPARED FOR THE CAPITAL REGIONAL
DISTRICT
BY BC STATS – APRIL 2019

AUTHORS

Sébastien Lavoie

CONTACT

Sébastien Lavoie – Sebastien.Lavoie@gov.bc.ca

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1. Introduction

This document describes the methodology used by BC Stats to produce the Capital Regional District (CRD) population, dwelling units and employment projection. It also includes a summary of the results. Projection for each component was done for the CRD, as well as its municipalities (see Figure 1 and Table 1), for the period covering 2019 to 2038. For this work, Juan de Fuca Part 1 and Part 2, two census subdivisions inside the CRD, were combined. Indigenous land and reserves that fall inside the Capital Regional District census division were not included in the projections.

TABLE 1: CAPITAL REGIONAL DISTRICT MUNICIPALITIES

Central Saanich	Oak Bay
Colwood	Saanich
Esquimalt	Southern Gulf Islands
Highlands	Sidney
Juan de Fuca (Part 1 and Part 2 combined)	Sooke
Langford	Salt Spring Island
Metchosin	Victoria
North Saanich	View Royal

For each municipality, population projection was done by single year of age and gender for each year in the projection period, while employment projection followed the 2012 North American Industry Classification System¹ (NAICS).

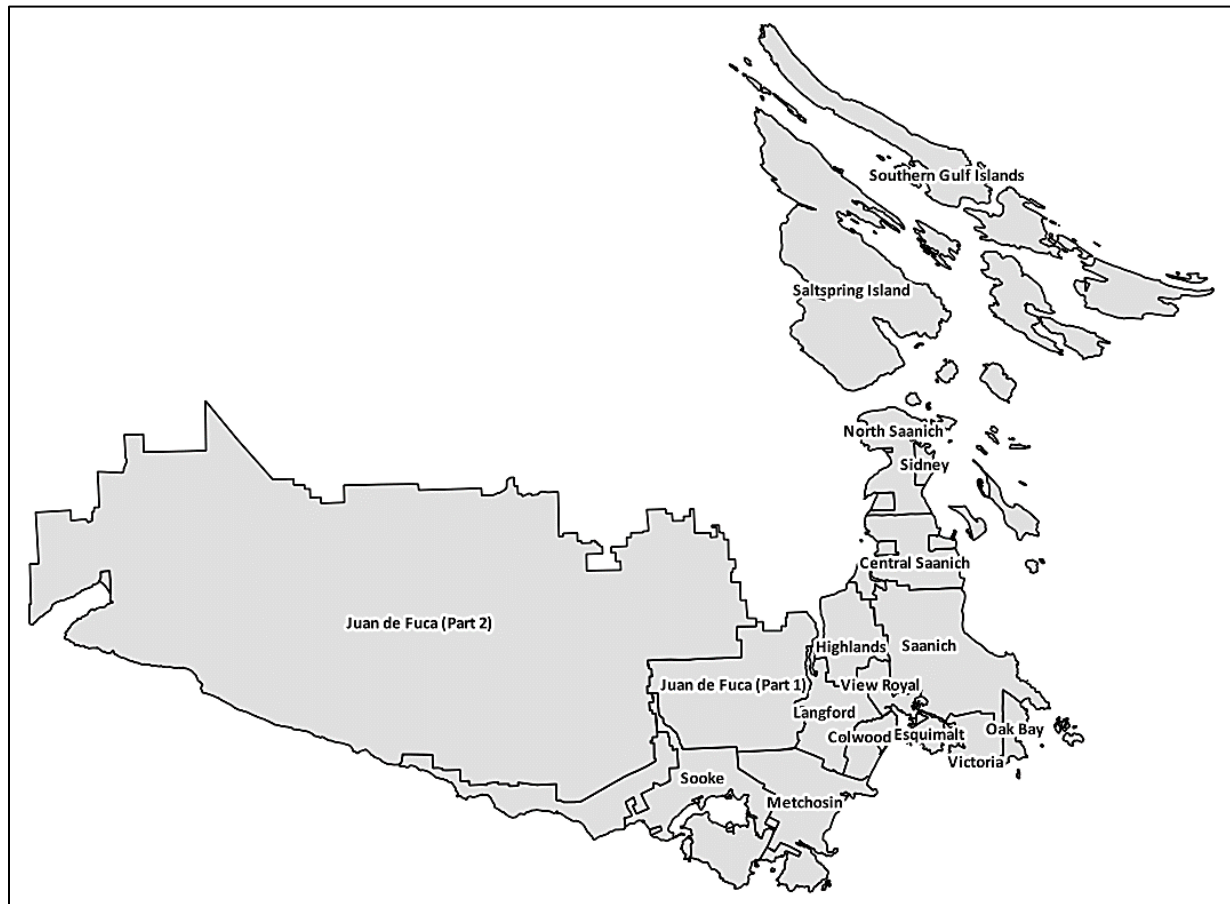
In general, all assumptions relating to migration, births and deaths by small area are based on past conditions, modified wherever possible to take into consideration known future changes. Consequently, the resulting population projections are not necessarily what will be, but rather what could be given the realization of these conditions. It is certainly possible that unforeseen changes in factors such as government policy, economic development, land use and zoning will affect future populations. Projections should be regarded as only one possible scenario of the future size and age-sex structure of the population.

The accuracy of the sub-CRD population projection hinges on several assumptions including the accurate projection of future migration levels, the quality of the base population and the reliability of the projected CRD population. It should also be noted that because the process of change is cumulative, the reliability of the projections may

¹ <https://www.statcan.gc.ca/eng/subjects/standard/naics/2012/introduction>

decrease over time. Historical data for international, interprovincial and intraprovincial migration at a sub-provincial level has proven to be quite volatile.

FIGURE 1: CAPITAL REGIONAL DISTRICT – CENSUS SUBDIVISIONS



2. Methodology

2.1. CRD Population Projection

The Capital Regional District population projection is based on the PEOPLE (Population Extrapolation for Organizational Planning with Less Error) methodology. PEOPLE projects population forward using a Component/Cohort-Survival population model. It uses fertility, mortality and migration assumptions, and applies them to a base year age-specific population. The population evolves by promoting each age group into the next, while considering the effects of net migration, deaths and births.

For this project, BC Stats used its 2018 population estimate, based on the 2016 Census² adjusted for net census undercoverage³, as base population. Due to the nature of the Component/Cohort-Survival model, the assumptions for each component, namely fertility, mortality and migration, are projected separately. Each component is projected using historical data and trends for each Local Health Area in the region, the base geography used by PEOPLE for inputs. The accuracy of the projection for each component depends on the size of the sample for which historical data is available. Because of this, projection of the components based on a larger population tends to be more accurate than for smaller population. The population of the CRD was projected first, based on assumptions derived for the Local Health Areas inside the district⁴, so it can be used as a control total for individual municipality projections. The CRD-level projection sets the total population by age and gender to which the sum of all municipality-level projections must add up to. This method is essentially the same as the one used by BC Stats for projections of other sub-geographies in British Columbia.

2.1.1. Fertility

The BC Vital Statistics Agency supplies BC Stats with up-to-date data regarding vital events within the province. This is used to build a historic picture of births at the sub-provincial level and is used to forecast what might happen in the future. In general, vital events remain stable over time from a probabilistic perspective. As such, it is expected that certain historical trends will continue within the foreseeable future, or over the projection horizon.

² <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/index-eng.cfm>

³ <https://www150.statcan.gc.ca/n1/daily-quotidien/180927/dq180927k-eng.htm>

⁴ CRD municipalities fall in the following Local Health Areas: 61 (Esquimalt, Oak Bay, Victoria, View Royal), 62 (Colwood, Highlands, Juan de Fuca, Langford, Metchosin, Sooke), 63 (Central Saanich, North Saanich, Sidney), 64 (Salt Spring Island, Southern Gulf Islands). 61 and 63 each cover parts of Saanich.

The PEOPLE projection system uses Local Health Areas (LHA) as a base geography for its various inputs. Local Health Areas 61, 62, 63 and 64 all cover some parts of the CRD. Using historical birth events provided to BC Stats, age-specific fertility rates are projected up to 2038 for each of the LHA covering the CRD. Table 2 shows how the total fertility rates (i.e. the total number of births per 1,000 women through the ages 15 to 49) are projected to evolve over the 2019-2038 period. After a significant decrease in the number of children per woman over the last half-century, fertility rates have been observed to stabilise across many developed nations. Similarly, fertility rates are expected to stay quite stable until 2038 in the Capital Regional District.

TABLE 2: TOTAL FERTILITY RATE PER LOCAL HEALTH AREA 2019-2038

Local Health Area	2019	2028	2038
61	1,154	1,164	1,165
62	1,560	1,555	1,552
63	1,442	1,443	1,441
64	1,448	1,447	1,445

2.1.2. Life Expectancy

BC Stats also obtains the number of death events from the BC Vital Statistics Agency. From this data, an age-specific mortality rate can be calculated and applied to each cohort to produce a death count. Unlike fertility rate, mortality rate is not stable, but slowly decreasing over time as life expectancy increases. Life expectancy is quite similar across CRD municipalities, the main difference being that life expectancy at birth for women is on average 3.2 years longer than for men in 2019. As shown in Table 3, it is forecasted that women's life expectancy will increase to 86.9 years by 2038, compared to 84.9 years for men, narrowing this gap slightly. Using the projected life expectancies at birth, mortality rates can be calculated for each year and applied to the CRD cohort.

TABLE 3: CRD PROJECTED LIFE EXPECTANCY AT BIRTH 2019-2038

Gender	2019	2028	2038
Male	81.7	83.1	84.9
Female	84.9	85.8	86.9

2.1.3. Net Migration

The level of net migration is far more volatile and challenging to predict than the number of births and deaths. Government policy changes and regional economic factors could

have a major short-term impact on migration levels or, for example, major projects may result in a large influx of new residents for several years. BC Stats attempts to address these challenges through careful consideration of available information. With regards to assumptions for migration across the province, the Major Projects Inventory (MPI)⁵ provides a tangible selection of large-scale infrastructure developments (each over \$15 million in capital costs) at varying stages of completion. Also, major local facility development or cancellation of a major construction project may have significant impacts on small areas in terms of movement of people. These events are considered in the assumptions used for projection.

As for the other components, net migration is calculated on a Local Health Area basis. Net migration is obtained from the combination of international immigrants and emigrants, interprovincial migration, as well as intraprovincial migration. Due to its favourable weather, diverse service economy and large public administration workforce, the CRD has historically had positive net migration numbers, meaning that more people come to the region than leave it. Table 4 shows what are the projected levels of annual net migration for each LHA in the Capital Regional District. Due to the high level of uncertainty surrounding migration, projection is mostly based on historical averages of the last two decades, corrected for major projects planned in the region.

TABLE 4: ANNUAL NET MIGRATION TO THE CRD REGION 2019-2038

Local Health Area	2019	2028	2038
61	2,128	2,385	2,428
62	1,746	1,867	1,850
63	646	720	732
64	253	275	274
Total	4,773	5,247	5,284

In recent years, migration to the Capital Regional District has been quite diverse with around 30% of net migration coming from new international immigrants settling in the region, 30% from another Canadian province, and 40% from people who relocated to the region from somewhere else in British Columbia.

2.1.4. Municipality-level Projection

Once the CRD-level projection has been completed, the population can be divided amongst each of the individual municipalities. A common method to obtain population subsets from a larger projection consists in evaluating what fraction of the total population each subset represents at different times along the projection horizon and

⁵ <https://www2.gov.bc.ca/gov/content/employment-business/economic-development/industry/bc-major-projects-inventory>

divide the total population accordingly to the demographic distribution of each components at the beginning of the projection. Table 5 contains the projected fraction of the CRD total population in each municipality based on population trends over the last two decades, as well as some level of information obtained from the municipalities.

TABLE 5: FRACTION OF CRD TOTAL POPULATION BY MUNICIPALITY 2019-2038

Municipality	2019	2028	2038
Central Saanich	4.4%	4.4%	4.3%
Colwood	4.4%	4.5%	4.6%
Esquimalt	4.6%	4.4%	4.2%
Highlands	0.6%	0.6%	0.6%
Juan de Fuca	1.2%	1.2%	1.1%
Langford	9.4%	11.2%	13.2%
Metchosin	1.2%	1.2%	1.1%
North Saanich	2.9%	2.8%	2.6%
Oak Bay	4.7%	4.3%	3.8%
Saanich	29.8%	28.9%	28.0%
Salt Spring Island	2.7%	2.6%	2.5%
Sidney	3.0%	2.9%	2.8%
Sooke	3.4%	3.9%	4.5%
Southern Gulf Islands	1.1%	0.9%	0.6%
Victoria	22.4%	22.1%	21.8%
View Royal	2.7%	2.9%	3.1%
IRI ⁶	1.3%	1.3%	1.3%

While the population in the CRD is growing, the relative distribution across municipalities will be changing. The city of Langford is expected to see the largest gains in terms of its weight in the CRD, representing up to 13.2% of the CRD population in 2038, up from 9.4% in 2019.

Combining the CRD population projection and the information in Table 5 with the age and gender structure of each municipality in 2018, detailed demographic profiles are created to cover the entire projection period. This ensures that the population by age and gender of each municipality represent the evolution of that population, while the combination of all municipalities is in line with the CRD control total population.

⁶ Indigenous reserves and land are not part of the final CRD projection products.

2.2. CRD Dwelling Units Projection

As is the case with population projections, projection of the number of private dwellings by small area is of value for planning purposes. The primary component of the British Columbia small area dwellings projection methodology is a projection of the average number of persons per private dwelling. As per Statistics Canada definition, *Private Dwelling*⁷ refers to a separate set of living quarters with a private entrance either from outside the building or from a common hall, lobby, vestibule or stairway inside the building. The entrance to the dwelling must be one that can be used without passing through the living quarters of some other person or group of persons. Specifically, the projection of dwelling units refers only to those that are occupied by usual (permanent) resident⁸.

The number of people per dwelling is projected using a combination of three independent variables determined to be predictors of this variable:

1. **The children population aged 0 to 19 by small area.** Generally, children under 19 do not live in a private dwelling of their own. Hence, in areas with a relatively high child population, the number of persons per dwelling should tend to be higher.
2. **The married/common-law population by small area.** Marital status of the population will affect the number of people per dwelling. The married population accounts for a large proportion of households, and thus can influence average dwelling size. Although unintuitive, it was found that the average number of people per dwelling by small area was inversely related to the size of married population. Although no study has yet been conducted by BC Stats to analyze this phenomenon, one possible explanation is that marriages result in the dissolution of larger parental households into multiple dwellings. For example, a family of four may result in two families of three and two each living in different dwellings after the marriage of one child, which is a lower average per dwelling.
3. **The divorced and separated populations by small area.** Divorce and separation affect the type and size of dwellings formed. For example, people who are divorced or separated can form lone-parent families or single-person households, which generally tends to result in lower average number of people per dwelling.

Table 6 shows that over the projection horizon, the average number of persons per dwelling unit in the CRD is expected to decrease in most municipalities. Once the number of persons per dwelling for some future point in time has been forecasted, the

⁷ <https://www12.statcan.gc.ca/census-recensement/2016/ref/dict/households-menage014-eng.cfm>

⁸ <http://www23.statcan.gc.ca/imdb/p3Var.pl?Function=Unit&Id=108091>

number of private dwellings is derived by applying this ratio to an independently derived population projection as outlined above. This method is first be applied to the CRD and then to each municipality, ensuring that the total number of private dwellings agree.

TABLE 6: CRD PERSON PER DWELLING UNIT BY MUNICIPALITY 2019-2038

Municipality	2019	2028	2038
Central Saanich	2.34	2.25	2.12
Colwood	2.46	2.37	2.22
Esquimalt	2.00	1.96	1.90
Highlands	2.61	2.58	2.52
Juan de Fuca	2.24	2.15	2.02
Langford	2.39	2.29	2.14
Metchosin	2.47	2.31	2.10
North Saanich	2.33	2.24	2.11
Oak Bay	2.30	2.36	2.39
Saanich	2.38	2.39	2.36
Salt Spring Island	2.10	2.05	1.97
Sidney	2.00	1.91	1.79
Sooke	2.41	2.37	2.30
Southern Gulf Islands	1.85	1.83	1.77
Victoria	1.82	1.82	1.79
View Royal	2.36	2.24	2.06

2.3. CRD Employment Projection

Employment projections by place of work are not directly produced by BC Stats, but the Workforce Innovation division of the Ministry of Advanced Education, Skills and Training does produce employment growth projection by 2-digit NAICS industry⁹. These projections are used as part of the labour market supply model to produce the BC Labour Market Outlook report¹⁰. BC Stats acquired the employment growth figures for the 2018-2028 period, as well as 2006 Census, 2011 National Household Survey and 2016 Census employment by place of work and by industry data for the CRD, and each

⁹ Employment industry categories are based on the 2012 North American Industry Classification System. Categories were grouped to reflect projection inputs from the Workforce Innovation Division as follows: Trade (Wholesale trade and Retail trade); Finance, Insurance and Real Estate (Finance and insurance; Real estate, rental and leasing); Professional, Scientific and Managerial (Professional, scientific and technical services; Management of companies and enterprises); Other Services (Other services; Information and cultural industries; Administrative and support, waste management and remediation services; Art, entertainment and recreation).

¹⁰ <https://www.workbc.ca/Labour-Market-Industry/Labour-Market-Outlook.aspx>

individual municipality. It is important to note that place of work employment refers to the location of the workplace, not the residence of the employee. For example, a worker living in the city of Langford who commutes every day to work in an office in Victoria would be counted as being in Victoria for place of work employment purposes.

Future employment levels are difficult to predict due to the direct impact of economic and political events on the workforce that are impossible to accurately predict ahead of time. While the employment growth data from the Workforce Innovation division is the best available for this projection, it does not cover the 2029-2038 period. It is also intended to represent the Vancouver Island/Coast Development Region and is not available for the CRD alone. BC Stats consulted with the Workforce Innovation group about the two main limitations outlined above and concluded that employment growth could be extrapolated to 2038. Since the CRD represent half the total population in the Vancouver Island/Coast region, employment growth will be applied to the CRD-level projection. For municipality-level projections, BC Stats analyzed the employment trends by industry in each municipality between 2006 and 2016 based on Census data. Emergent or declining local industries should show a sustained above- or below-average growth when compared to the CRD over the same period. This leads to adjustments in the employment growth rates for individual municipality for these industries. As with the population projection, employment growth will be used to project employment by industry for the CRD, which will then be used as a control total for municipality-level employment projections.

TABLE 7: CRD NORMALIZED EMPLOYMENT BY INDUSTRY 2019-2038

Industry	2019	2028	2038
Accommodation and food services	100	123	158
Agriculture, forestry, fishing and hunting	100	111	127
Construction	100	102	100
Educational services	100	120	153
Finance, Insurance and Real Estate	100	103	102
Government services	100	102	96
Health care and social assistance	100	112	125
Manufacturing	100	106	113
Mining, quarrying, and oil and gas extraction	100	169	308
Other Services	100	115	133
Professional, Scientific and Managerial	100	114	130
Trade	100	106	108
Transportation and warehousing	100	116	139

Utilities	100	128	184
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While employment growth varies every year, Table 7 summarizes the changes that would occur in a normalized employment cohort of 100 people beginning in 2019. For each industry, the following columns indicate the size of the cohort in 2028 and 2038, accounting for the cumulative changes to the employment in this industry. As shown in the table, most of the gains are expected to be in service-related industries.

3. Results

3.1. CRD Population

Over the 2019-2038 period, the Capital Regional District population is projected to increase by 20%, from 412,465 to 493,975. Growth rate will be the highest in the Western Communities where the population will increase by over 30,000 people, similar to Saanich and Victoria combined over the same period. Langford alone is expected to see its population grow by over 25,000 people, the largest gain in the district. Table 8 summarizes the population of each municipality over the projection period, showing that population changes vary quite significantly between them.

TABLE 8: CRD MUNICIPALITIES POPULATION 2019-2038

Municipality	2019	2028	2038
Central Saanich	18,403	20,084	21,545
Colwood	18,493	20,766	22,935
Esquimalt	19,191	20,327	21,137
Highlands	2,452	2,833	3,203
Juan de Fuca	5,048	5,300	5,425
Langford	39,352	51,403	65,794
Metchosin	5,127	5,460	5,614
North Saanich	12,310	12,803	13,012
Oak Bay	19,639	19,708	19,147
Saanich	124,375	133,179	139,897
Salt Spring Island	11,115	11,876	12,405
Sidney	12,715	13,507	14,045
Sooke	14,374	18,156	22,399
Southern Gulf Islands	4,811	4,139	3,106
Victoria	93,600	101,734	108,898
View Royal	11,460	13,353	15,413
Total	412,465	454,628	493,975

The demographic characteristics of the Capital Regional District are projected to change as well between 2019 and 2038. As show in Table 9, the age group of 65 years old and over is expected to see the largest increase at 53%, while the 0 to 17 years old is only expected to grow by 15%. This means that population 65 years and over will represent over 28% of the CRD population in 2038, compared to 22% in 2019. At the same time, the 18 to 64 years old group is projected to only grow by around 9%, leading to a

reduction in that group demographic weight to 57% of the population, from 63% in 2019. This change is significant since that age group contains most of the active workforce in the region.

TABLE 9: CRD POPULATION AGE DISTRIBUTION 2019-2038

Age Group	2019	2028	2038	2019-2038 Change
0 - 17	62,884	69,534	72,469	15%
18 - 24	36,893	34,146	37,912	3%
25 - 44	108,302	117,502	115,302	6%
45 - 64	112,374	111,985	127,333	13%
65 and over	92,012	121,461	140,959	53%
Total	412,465	454,628	493,975	20%

3.2. CRD Dwelling Units

The Capital Regional District is forecasted to see an increase of 25% in the number of its occupied dwelling units by 2038. As is the case for population, the Western Communities are expected to proportionally see the largest gains in the region. Table 10 presents a summary of the number of occupied dwelling units for each municipality.

TABLE 10: CRD OCCUPIED DWELLING UNITS PER MUNICIPALITY 2019-2038

Municipality	2019	2028	2038
Central Saanich	7,541	8,546	9,721
Colwood	7,182	8,399	9,870
Esquimalt	9,183	9,902	10,666
Highlands	901	1,050	1,217
Juan de Fuca	2,210	2,416	2,630
Langford	15,778	21,521	29,403
Metchosin	1,985	2,259	2,552
North Saanich	5,047	5,466	5,911
Oak Bay	8,168	7,987	7,661
Saanich	49,986	53,406	56,814
Salt Spring Island	5,102	5,585	6,089
Sidney	6,099	6,770	7,520
Sooke	5,715	7,319	9,311
Southern Gulf Islands	2,487	2,169	1,678
Victoria	49,115	53,427	58,111

View Royal	4,637	5,712	7,147
Total	181,136	201,934	226,301

While most municipalities show a gain in dwelling units, Southern Gulf Islands shows a significant decrease. It is important to remember that this projection is based on demographic factors and, as such, needs to be interpreted in addition to other real estate and economic factors. The reduced numbers of occupied dwelling units in Southern Gulf Islands is almost certainly not due to units becoming abandoned or demolished but is most probably due to a change in their primary use. With its aging demographics, it is reasonable to assume that a lot of the properties will change hands over the projection horizon and that some of them will become secondary residences, or possibly be used for short term rental purposes. Both of these dwelling use cases would not qualify them to be counted as private dwellings occupied by usual residents.

3.3. CRD Employment

Total employment levels in the Capital Regional District is expected to grow by 23% by 2038, similar to the growth in population over the same period. Most municipalities in the district are expected to see some growth in the number of people working within its boundaries. However, it is important to emphasize that employment is the most volatile components presented in this document. Policy and economic factors could make these figures vary dramatically over the projection horizon. Nevertheless, as shown in Table 11, the Western Communities are forecasted to see significant employment growth, as do Victoria and Saanich.

TABLE 11: CRD PLACE OF WORK EMPLOYMENT BY MUNICIPALITY 2019-2038

Municipality	2019	2028	2038
Central Saanich	9,700	10,770	11,960
Colwood	4,309	4,712	5,251
Esquimalt	13,136	12,653	10,994
Highlands	244	401	695
Juan de Fuca	587	1,049	1,908
Langford	13,541	16,436	20,190
Metchosin	1,341	1,772	2,460
North Saanich	5,594	7,138	9,428
Oak Bay	8,017	7,763	7,944
Saanich	49,239	56,802	65,644
Salt Spring Island	5,129	5,617	6,200
Sidney	6,948	7,461	7,795

Sooke	2,836	3,467	4,397
Southern Gulf Islands	2,221	2,635	3,423
Victoria	92,016	99,016	103,064
View Royal	5,985	7,383	9,380
Total	220,843	245,075	270,733

Growth is projected to vary significantly across industries in the region. As the CRD continues to grow at a similar rate, construction employment is also expected to stay at similar levels as shown in Table 12. Services and Health care are projected to see the largest increases while others, such as Agriculture, Manufacturing and Trade, are expected to only see marginal changes.

TABLE 12: CRD PLACE OF WORK EMPLOYMENT BY INDUSTRY 2019-2038

Industry¹¹	2019	2028	2038
Accommodation and food services	19,573	24,149	30,909
Agriculture, forestry, fishing and hunting	2,117	2,344	2,692
Construction	7,323	7,488	7,348
Educational services	18,777	22,589	28,681
Finance, Insurance and Real Estate	13,309	13,762	13,516
Government services	33,634	34,273	32,275
Health care and Social assistance	31,488	35,375	39,253
Manufacturing	7,852	8,343	8,884
Mining, quarrying, and oil and gas extraction	105	177	323
Other services	26,382	30,267	35,030
Professional, Scientific and Managerial	19,639	22,403	25,596
Trade	33,316	35,325	35,861
Transportation and warehousing	6,867	7,990	9,515
Utilities	461	590	850
Total	220,843	245,075	270,733

¹¹ Employment industry categories are based on the 2012 North American Industry Classification System. Categories were grouped to reflect projection inputs from the Workforce Innovation Division as follows: Trade (Wholesale trade and Retail trade); Finance, Insurance and Real Estate (Finance and insurance; Real estate, rental and leasing); Professional, Scientific and Managerial (Professional, scientific and technical services; Management of companies and enterprises); Other Services (Other services; Information and cultural industries; Administrative and support, waste management and remediation services; Art, entertainment and recreation).

4. Conclusion

The Capital Regional District is facing similar challenges as other parts of British Columbia. While the population in the region will keep growing, in part due to a diverse positive net migration, it will also age significantly due to a stable, but low, fertility rate. This situation is not unique to the region and is seen all across Canada and other developed nations. Victoria and Saanich will remain the largest population and employment centres over the projection horizon, but significant gains will happen in the Western Communities. Increasing land saturation and cost of property in Victoria and Saanich being probable contributing factors favouring the growth of all components in Langford and the surrounding municipalities.

To accommodate for the increased population, additional dwelling units will have to be constructed. It is reasonable to expect that municipalities such as Victoria and Saanich will see increased densification to accommodate these new units, probably with the construction of more high-density condominium towers. Less saturated areas such as the Western Communities should see a more diverse mix of new constructions including single-family housing, but additional densification in the municipality cores should also be expected.

All across the CRD, the population structure will change significantly, with 65 years old and over expected to grow by over 50% by 2038. This will impact how services are delivered, and increase accessibility and care needs across the region. While the younger population is not expected to grow nearly as much, it is a segment of the population that prefers to live near city centres, close to work and services. This not only impacts demographics in more rural areas but is also expected to keep putting pressure on the rental and real estate markets in urban centres. Moreover, while the Western Communities will see a large increase in population, Victoria and Saanich will keep on being the main locations of employment. The number of commuters should be expected to keep increasing, which will increase the needs for investments in mass transportation and infrastructure upgrades across the Capital Regional District.



BC Stats is the provincial government's leader in statistical and economic research, information and analysis essential for evidence-based decision-making. BC Stats, the central statistics agency of government, is excited to be taking a lead role in the strategic understanding of data sources and analysis across government. The goal is to increase overall business intelligence—information decision makers can use. As part of this goal, BC Stats is also developing an organizational performance measurement



Box 9410 Stn Prov Govt
Victoria, B.C.
V8W 9V1

Web: www.bcstats.gov.bc.ca

Twitter: @BCStats

Email: BC.Stats@gov.bc.ca

