

REGIONAL EMPLOYMENT LANDS INVENTORY & GAP ANALYSIS

Regional District of Central Okanagan



Prepared for:



CONTENTS

EXECUTIVE SUMMARY	1
1. INTRODUCTION	10
Project Overview	10
Methodology	11
2. REGIONAL EMPLOYMENT LANDS INVENTORY	20
The Employment Lands Inventory at a Glance	20
Development Constraints on Vacant Land	29
Underutilized Lands and Other Opportunities for Additional Supply.....	31
3. EMPLOYMENT LAND UTILIZATION ANALYSIS	33
Estimating Jobs in Each Employment Lands Analysis Class	33
Employment Change Among Land Uses	35
Market Absorption Trends.....	39
4. PROJECTED GROWTH AND EMPLOYMENT LAND DEMAND	42
Regional Population Projections	42
Regional Employment Projections	44
Employment Land Demand Projections.....	49
5. EMPLOYMENT LAND GAP ANALYSIS	54
Regional Gap Analysis.....	55
Gap Analysis by ELAC.....	56
6. SUMMARY OF FINDINGS AND IMPLICATIONS	64
APPENDIX A – DETAILED EMPLOYMENT LANDS STATISTICS AND INVENTORY MAPS	68
APPENDIX B – EMPLOYMENT LANDS INVENTORY SORTING	89
APPENDIX C – EMPLOYMENT TO ELAC ASSUMPTIONS	130



ACKNOWLEDGEMENTS

The Regional District of the Central Okanagan is located within the traditional, ancestral and unceded land of the syilx / Okanagan people, who have resided here since time immemorial. We recognize, honour, and respect the syilx / Okanagan lands on which we live, work, and play.

This report was developed in collaboration between the RDCO and local partners, including guidance from a Technical Committee comprised of staff and subject matter experts from the following local governments and organizations:

- The Regional District of Central Okanagan
- The City of Kelowna
- The City of West Kelowna
- The District of Peachland
- The District of Lake Country
- Westbank First Nation
- The Central Okanagan Economic Development Commission

The report also incorporates regional population projections prepared in parallel by Rennie and regional employment projections prepared by Deloitte.



EXECUTIVE SUMMARY

PURPOSE

This Regional Employment Lands Inventory (RELI) & Gap Analysis report provides a comprehensive assessment within the Regional District of Central Okanagan (RDCO) to understand and proactively plan for the supply and utilization of employment-supporting lands. This includes the RDCO East and West Electoral Areas, City of Kelowna, City of West Kelowna, District of Peachland, District of Lake Country, Westbank First Nation (WFN) (IR #9 & #10), and Okanagan Indian Band (OKIB) (IR #7). The RELI analysis provides a contextual assessment of current employment land uses for various economic activities across the region and local jurisdictions, accompanied by a set of detailed employment land demand projections between 2023 and 2046. The report culminates in a land demand and supply gap analysis, identifying where the region may face shortfalls for different types of serviced employment lands.

At its core, the RELI project seeks to understand three key elements:

- **EMPLOYMENT CHANGE:** How much employment growth is reasonable to expect across the region by 2046?
- **LAND USE DEMAND:** How do those jobs relate to different types of land and how much land is needed to accommodate that demand?
- **POTENTIAL SUPPLY:** How much land do we have available to accommodate that demand? Where are there shortfalls or constraints?

The development of the report was guided by a Technical Committee of staff from across the region and informed by regional population and employment projections prepared in parallel by consulting teams from Rennie and Deloitte, respectively.

A Geographic Information System (GIS) tool has also been created that will enable the RDCO, member jurisdictions, First Nations, and local partners to better understand the location of existing employment lands and constraints. The GIS tool is intended to support future strategic planning and economic development.

UNDERSTANDING THE EMPLOYMENT LANDS INVENTORY

The RELI consolidates and categorizes land use and policy data from local jurisdictions across the Central Okanagan into a standardized format for analysis purposes. Employment lands were sorted into six different Employment Land Analysis Classes (ELAC), which represent typical economic functions and business activities. The classes are split between urban and rural groupings based on typical location and servicing requirements, summarized as follows:

Urban

- **Commercial** – Retail, service and office uses, including most mixed-use spaces that span across a range of formats (e.g. standalone buildings, commercial malls, ground floor storefronts, and other mixed employment spaces).
- **Industrial** – Economic activities typically associated with the manufacture, storage, or transportation of goods and materials, typically located in factories, warehouses, logistics facilities and business parks. This category also includes the airport, landfills, wastewater treatment plants and facilities, as well as other civic properties of industrial nature.
- **Institutional** – A mix of civic functions including schools, primary healthcare facilities and municipal halls.

Rural

- **Agricultural** – Lands used for farming and other supportive uses. May also include employment associated with the production of food and processing of compost located on farmlands designated for agricultural uses.
- **Tourism / Commercial Recreation (TCR)¹** – Tourist-oriented uses including hotels and resorts, private recreational properties (e.g. golf courses), wineries and other tourist-oriented commercial services that are not typically found within urbanized areas.
- **Other Rural** – Uses that are primarily extractive in function, including lands for hunting and other non-urban lands.

The RELI incorporates several different data sets to identify opportunities and constraints associated with each parcel of land. These include:

- Whether the parcel is currently occupied or vacant, as identified by BC Assessment
- If the current zoning aligns with the intended Future Land Use set forth in the respective local planning legislation documents (i.e. Official Community Plan, OKIB Land Use Plan and WFN Land Use Law)

¹ Not all jurisdictions feature Future Land Use categories that distinguish between Commercial and TCR uses (ex. the City of Kelowna). In these cases, TCR-related employment is generally accommodated within their Commercial and Agricultural ELAC categories.

- If residential uses are also permitted within the land use designation
- If the site has access to public infrastructure and transit service
- If the site features geographic or environmental constraints

Each of these factors enables the RELI to provide important context on the current land supply for different types of employment activities and its ability to accommodate growth. The following table provides an overview of the Central Okanagan Region’s employment lands supply, detailing:

- **Parcels:** Total number of parcels within each ELAC
- **Occupied:** All sites within the ELAC considered to be actively occupied by a functional improvement or otherwise utilized for productive use according to BC Assessment
- **Vacant:** All sites within the ELAC that either do not feature a functional improvement or are not otherwise utilized for productive use according to BC Assessment
- **% of Total:** The share of all regional employment land (by area) that belong to this ELAC

Central Okanagan Region Lands Distribution Overview (ha)					
Total Central Okanagan Region Employment Lands: 56,740.9 ha					
Commercial 1,036.2 ha	Parcels	2,558	Agricultural 33,630.1 ha	Parcels	3,992
	Occupied	877.2 ha		Occupied	16,310.6 ha
	Vacant	159.0 ha		Vacant	17,319.5 ha
	% of Total	1.8%		% of Total	59.3%
Industrial 1,795.7 ha	Parcels	945	Tourism / Commercial Recreation 3,338.8 ha	Parcels	617
	Occupied	1,198.6 ha		Occupied	310.9 ha
	Vacant	597.1 ha		Vacant	3027.8 ha
	% of Total	3.2%		% of Total	5.9%
Institutional 720.0 ha	Parcels	583	Other Rural 16,220.0 ha	Parcels	103
	Occupied	654.4 ha		Occupied	778.2 ha
	Vacant	65.6 ha		Vacant	15,441.8 ha
	% of Total	1.3%		% of Total	28.6%

Source: B&A Studios, using data from RDCO, local jurisdictions, and BC Assessment

The RELI identifies 56,741 ha of employment-supporting land across the Central Okanagan. Of this, approximately 3,552 ha (6.3%) is urban in nature, with rural uses totaling approximately 53,189 ha (93.7%). Key statistics related to this inventory, including identification of vacant land and potential constraints are detailed throughout the body of the report, with jurisdiction specific breakdowns and mapping provided in **Appendix A**.

EMPLOYMENT LAND UTILIZATION AND PROJECTED DEMAND

Coupled with a review of employment land utilization and market trends, the RELI incorporates regional projections of population and employment growth from 2023 to 2046² to develop detailed outlooks for employment land need. Employment projections for Low, Medium and High Growth scenarios were prepared to enable the region and its partners to plan for a range of potential viable outcomes based on the historic trajectory of growth in the region³, summarized as follows:

- From 2023 and 2046 the region is projected to grow by 50,000 to 126,000 new residents⁴.
- Accounting for new residents and residents aging into the workforce, employment is projected to grow by between 44,000 and 67,000 new jobs. Factoring for where people work and changing trends in remote work, it is expected that between 38,000 and 58,000 of these jobs are expected to be linked to employment lands in the region.
- Considering both historic and emerging land use trends, the projected job growth translates to a need for between approximately 631 ha and 959 ha of urban employment land, and 2,848 ha to 2,889 ha of rural employment land, representing a total of approximately 3,478 ha to 3,848 ha projected employment land demand.

Projected Land Demand by ELAC, Central Okanagan							
Analysis Class	Assumed Density (jobs/ha)*	Low Employment Scenario		Medium Employment Scenario		High Employment Scenario	
		Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)
Commercial	88.0	17,110	194.5	21,350	242.2	26,575	299.9
Industrial	45.5	11,135	244.8	13,700	301.1	17,165	377.5
Institutional	44.3	8,460	191.1	9,945	222.3	13,000	281.1
Agricultural	0.3	770	2,741.0	770	2,741.0	770	2,741.0
TCR	10.8	335	34.9	320	33.4	400	42.3
Other Rural	1.3	95	71.7	105	79.3	140	105.7
Total		37,900	3,478.0	46,190	3,619.4	58,050	3,847.5

Source: B&A Studios, using data from Deloitte, RDCO, and local jurisdictions

² Due to the timing of available land vacancy data, 2023 is utilized as the baseline for the employment projections and associated land demand estimates, differing slightly from the population projections, which rely on a 2024 base year.

³ The Low employment scenario reflects the 5-year trend in migration to the region. The Medium scenario represents a detailed assessment of international and intra-provincial migration prepared by Rennie. The High scenario is based on the outlook prepared by BC Stats, which assumes high rates of immigration.

⁴ Net population change here differs from that highlighted in the Rennie report, which summarizes change between 2024 and 2046, to instead reflect the 2023 base utilized by the employment projections.

GAP ANALYSIS

Considered together, the projections of employment land need and the detailed assessment of the Regional Employment Land Inventory enable the measurement of both demand and supply factors culminating in a regional gap analysis. This analysis identifies areas of potential surplus or deficit between the demand for land and the capacity to accommodate it within ELACs at the regional and local level.

Central Okanagan Projected Land Demand and Supply Gap, 2023-46 (ha)					
ELAC	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus/(Deficit)	Demand	Surplus/(Deficit)
Urban Employment Land					
Commercial	159.0	194.5	(35.5)	299.9	(140.9)
Industrial	597.1	244.8	352.3	377.5	219.6
Institutional	65.6	191.1	(125.4)	281.1	(215.5)
Rural Employment Land					
Agricultural	17,319.5	2,741.0	14,578.5	2,741.0	14,578.5
TCR	3,027.8	34.8	2,993.0	42.3	2,985.6
Other Rural	15,441.8	71.7	15,370.1	105.7	15,336.1

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

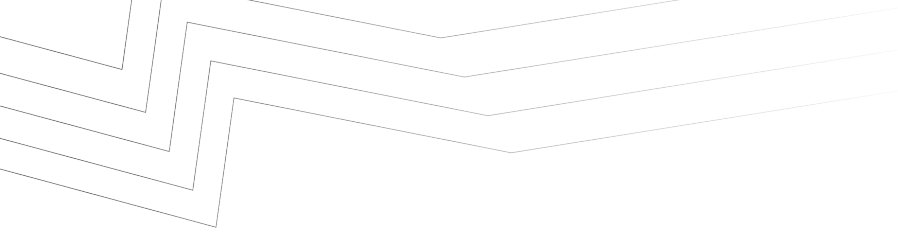
A Note When Reviewing the Gap Analysis Summary:

The total supply of vacant land does not provide the full picture as it relates to the employment capacity of the Central Okanagan. Many of these lands feature constraints, including limited access to public infrastructure, challenging topography, environmental restrictions, soil conditions and other factors that may limit the potential to accommodate economic activity.

In other instances, vacant parcels may represent city owned lands that are held in reserve for the expansion of civic uses, like the airport, landfill and wastewater treatment facilities. These lands may have limited potential to accommodate future business and employment growth.

Commercial:

- The region faces an annual average demand between approximately 8 ha and 13 ha of Commercial land per year. With a total of approximately 159 hectares of vacant land, this equates to between 12 to 19 years of supply.
- As much as three-quarters of this demand is projected to be generated in the City of Kelowna, which would far exceed the current supply. Barring the designation of additional Commercial designated land, much of this growth will need to be accommodated via the



intensified redevelopment of Kelowna's underutilized occupied lands (estimated at approximately 145 ha), though spillovers to other land uses, such as Industrial lands, and neighbouring communities may still occur even under the more conservative growth scenarios.

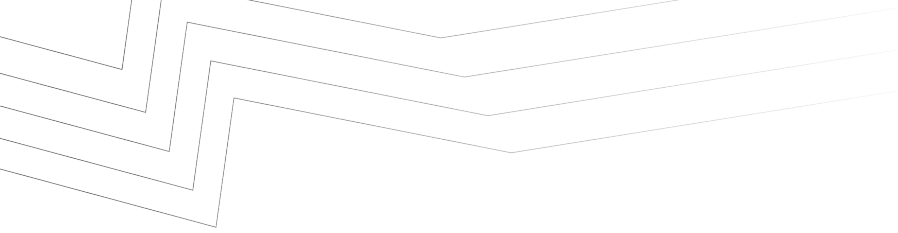
- Outside of Kelowna, most local jurisdictions are projected to have a modest surplus of vacant Commercial land after accounting for local demand. These lands could also potentially absorb some of the regional pressure currently allocated to Kelowna, though the population-serving nature of many Commercial businesses means this potential is somewhat limited. Servicing is also noted as a constraint for these lands, specifically in Kelowna and Lake Country.

Industrial:

- The region is projected to face an annual average demand between approximately 11 ha to 16 ha of Industrial land per year. With just over 597 ha of Industrial land flagged as vacant, this equates to between 36 and 56 years of supply; however, this does not consider constraints that may limit the use of these lands.
- With approximately 522 ha of vacant Industrial land, the City of Kelowna is projected to accommodate the largest share of Industrial growth by 2046. However, this comes with the caveat that just under two thirds of this land (approx. 344 ha) are currently serviced, and only a small portion (approx. 60 ha) are not otherwise constrained by potential geographic or environmental constraints. Additionally, some of the vacant supply has been designated for future civic uses, including the airport, transit yards, and landfill, and may not absorb as much potential for employment as other Industrial lands. These limitations may hinder Kelowna's ability to accommodate a significant portion of the projected growth.
- Throughout the rest of the region, only Lake Country appears to have a sufficient supply of vacant Industrial land to meet local projected demand. While Industrial demand for other parts of the region is modest, the supply of designated Industrial land that is both vacant and serviced could be a hindrance to economic opportunities tied to these lands at the local level.

Institutional:

- Projected demand for Institutional uses ranges between approximately 8 ha and 12 ha per year. With only about 66 ha of vacant supply identified, the region could potentially absorb this supply in less than a decade, though the post-pandemic impacts to some institutional functions may mute some of that demand in the near term while space needs are re-evaluated.

- 
- As with the other urban lands, Kelowna is expected to see the bulk of the total demand, putting considerable pressure on their limited supply of available land. Projected population growth in all other jurisdictions will also create local need for additional Institutional space across the region, most notably WFN IR #9 & IR #10, Lake Country and West Kelowna.
 - Some of this demand may be accommodated via the intensification of existing Institutional assets, though it appears likely that additional Institutional lands will also be required through to 2046. However, Institutional lands are often challenging to signal far in advance due to the specific nature of serving the population and demand associated with areas with population growth.

Agricultural:

- Demand for Agricultural uses is projected at 2,741 ha, or approximately 119 ha per year on average.
- While there is a regional surplus of vacant Agricultural lands to accommodate demand to 2046, most are constrained by steep slopes that limit potential farming activities. The RELI also cannot speak to soil quality, which is a key consideration in Agricultural productivity.
- Given the economic importance of agricultural uses to the Central Okanagan, the Region and its partners should be careful to protect viable agricultural lands over the long term.

Tourism / Commercial Recreation:

- The demand for Tourism and Commercial Recreation lands is projected to add between approximately 35 ha and 42 ha by 2046.
- While the land requirements of individual resort communities and other commercial recreational uses vary by case, the supply of vacant TCR land appears to be more than sufficient to accommodate TCR employment growth within the projection window.

Other Rural:

- There is only a limited amount of demand projected for Other Rural lands by 2046, approximately ranging from 72 ha to 106 ha.
- There does not appear to be a shortfall in the amount of land available to accommodate employment in this category. Should expansion of permanent growth boundaries be considered, these lands may warrant consideration for conversion to accommodate other economic activities facing land deficits.



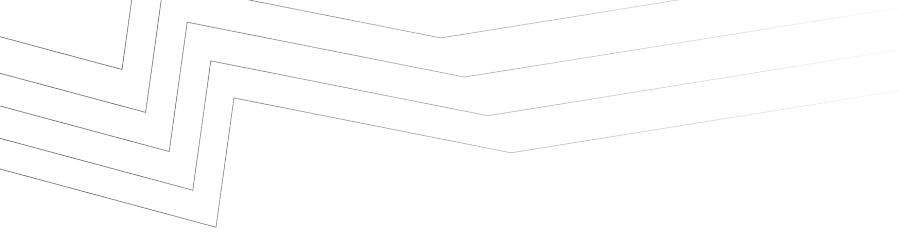
FINDINGS AND IMPLICATIONS

The Regional Employment Land Inventory gap analysis indicates there are several areas where the projected rate of employment growth will be greater than the current land supply's capacity to accommodate. This is most prevalent amongst urban employment land uses, namely Commercial and Institutional, but also amongst vacant Industrial land with access to infrastructure servicing and limited physical and environmental encumbrance. Most of this demand is focused within the City of Kelowna, but population growth across all parts of the region will drive the demand for local services and businesses.

As the available supply of vacant land and soft sites are depleted it will become increasingly challenging to bring new space to the market. Businesses are likely to face increased competition and rising rents, factors that may affect where employers choose to locate and grow their business, potentially choosing to move to a neighbouring jurisdiction within the region, moving somewhere else in BC, or out of province altogether.

The potential impacts of losing employment activity due to the lack of available land are threefold:

- The loss of local businesses could negatively affect the economy due to the loss of potential or existing jobs and tax revenues for governments.
- The further away these businesses locate, the greater the distance customers and workers will need to commute, and goods must be transported, resulting in increased fuel consumption, GHG emissions, traffic congestion, and cost to consumers and commuters. Longer travel distances and increased congestion may weaken the local supply chain, potentially leading to further loss of businesses in the region.
- The loss of employment activity across different sectors could weaken the region's economic diversity and resiliency, potentially exposing the economy to greater fluctuations in market cycles and broader economic shifts.



While it can be challenging to make room for growth, the benefits to the region of a strong, robust regional economy mean the Central Okanagan must be proactive to ensure the additional jobs and businesses that will want to locate locally are supported. These businesses, across all sectors, represent an integral component for the continued development of resilient and complete communities, providing jobs and creating numerous other economic benefits for residents and the region as a whole.

For this reason, proactive management and planning for continued growth across each of the different types of employment land are crucial for the long-term success of the Central Okanagan, its member jurisdictions, First Nations, and economic partners. The challenges facing employment land and economic planning are complex and will require a cooperative and coordinated effort from each to ensure shared success.

The RELI serves as a foundational tool to assist with this work. By providing a comprehensive understanding of what corresponding infrastructure and servicing plans the region has and what will be needed, the tool will inform the development of effective employment land studies, economic development and investment attraction studies, and policy solutions that ensure the Central Okanagan region is well positioned for continued and sustainable success.

1. INTRODUCTION

The Regional Employment Lands Inventory (RELI) is a geospatial tool designed to identify and understand the supply and utilization of employment-supporting lands in the Regional District of Central Okanagan (RDCO). This report details the methodology used to prepare the RELI and summarizes the primary findings from a gap analysis between current supply and future demand for different types of employment land between 2023 and 2046.

Project Overview

B&A Studios was retained by the Regional District of Central Okanagan (RDCO) to assist in the development of a Regional Employment Lands Inventory (RELI). The objective of this project is to identify and categorize all major land types that support economic activities across the region, utilizing quantitative and qualitative assessment to understand how these lands are utilized by different employment uses, where vacant and underutilized lands currently exist and estimating their capacity to accommodate projected future growth.

The RELI project supports various policies of the Regional Growth Strategy (RGS). The analysis provides a contextual assessment of current employment land uses for various economic activities across the Region and within the local municipal jurisdictions and First Nations, namely the RDCO East and West Electoral Areas, City of Kelowna, City of West Kelowna, District of Peachland, District of Lake Country, Westbank First Nation (IR #9 & #10), and Okanagan Indian Band (IR #7). Development of the RELI was guided by a Technical Committee comprised of subject matter experts from across the region.

This work was undertaken in parallel with and informed by the preparation of regional population and employment projections prepared by consulting teams from Rennie and Deloitte, respectively. The range of growth outlooks provided by the projections, coupled with the analysis of land and space utilization trends prepared as part of the RELI background research, provide an estimate of the future demand for employment land through to the year 2046.

A Geographic Information System (GIS) tool has also been created that will enable the RDCO, member jurisdictions, First Nations, and local partners to better understand the location of existing employment lands and constraints. The GIS tool is intended to support future strategic planning and economic development.

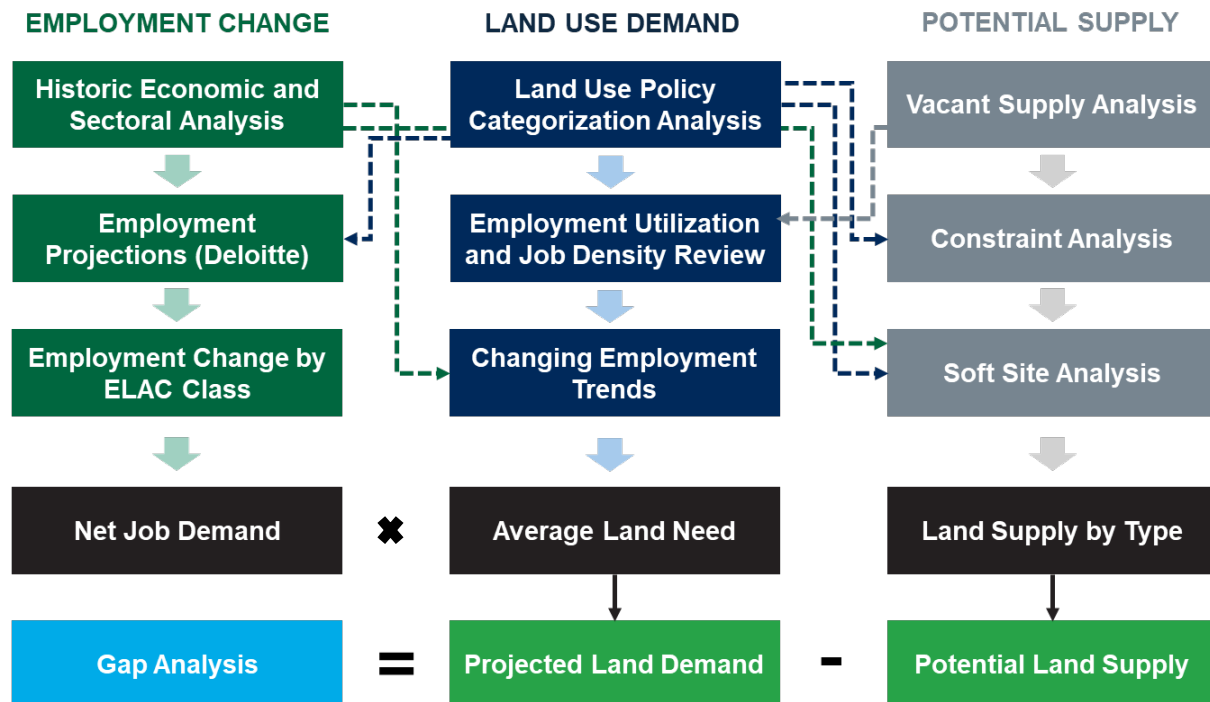
Methodology

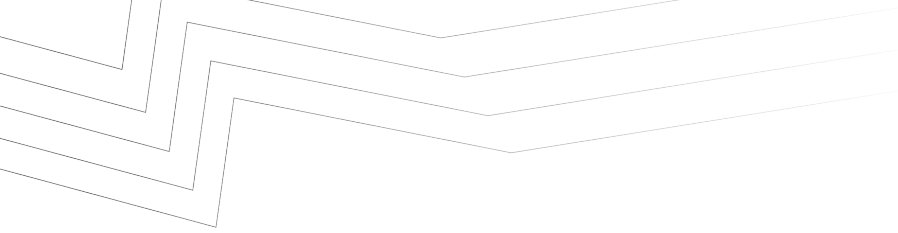
At its core, the RELI project seeks to understand three key elements:

- **EMPLOYMENT CHANGE:** How much employment growth is reasonable to expect across the region by 2046?
- **LAND USE DEMAND:** How do those jobs relate to different types of land and how much land is needed to accommodate that demand?
- **POTENTIAL SUPPLY:** How much land do we have available to accommodate that demand? Where are there shortfalls or constraints?

To understand each of these elements and answer the associated questions, the RELI project involved a detailed review of various related factors. This iterative process, summarized in Figure 1, incorporated numerous data sources to build an inventory of employment lands across the region, while also understanding how historic and emerging trends may shape the need for different types of land into the future. Work related to each element featured its own workstream, though research from each workstream informed elements of the others, as shown by the dashed lines in the diagram.

Figure 1: Overview of the RELI Methodology





The development of the Regional Employment Land Inventory and assessment of the current and future employment lands inventory was comprised of two overarching phases:

Phase 1: Development of Preliminary Inventory

The first phase was technical in nature, consisting of the consolidation and categorization of land use data into a preliminary GIS inventory based on current land use policies and assessment information. Key data utilized includes:

- Official Community Plans (OCP), including Future Land Use Plans, Comprehensive Community Plans and Strategic Plans;
- Local zoning bylaws and Land Use Laws;
- Additional land use policy shapefiles (i.e. agricultural land reserve, development permit areas, urban centres, etc.) provided by the RDCO and its partners; and
- Parcel ID, assessment value, current use, and vacancy from BC Assessment.

B&A undertook a comprehensive review of each of these sources to develop a definition of employment lands and developed a high-level categorization system based on Future Land Use designations, indicating intended uses under policy, and current zoning bylaws, representing permitted uses. The land use designations were categorized into categories for analysis based on the type of economic activity that typically was permitted, with special consideration given to economic activities critical to the region. GIS modelling was then used to identify key statistics, including the number and area of parcels within each category, distinguishing between occupied and vacant lands, presented for review by members of the project Technical Committee. Preliminary findings from this analysis were provided to the consulting team at Deloitte in order to inform the development of the employment projections.

Phase 2: Analysis of Inventory Utilization, Demand and Supply Gaps

The second phase incorporated the population and employment projections provided at the regional and local level to further assess employment lands and analyze current and future employment land demand with considerations of land occupancy and development potential based on infrastructure and servicing linkages, coupled with a market assessment of employment land demand. Additional data utilized to supplement this stage of analysis includes:

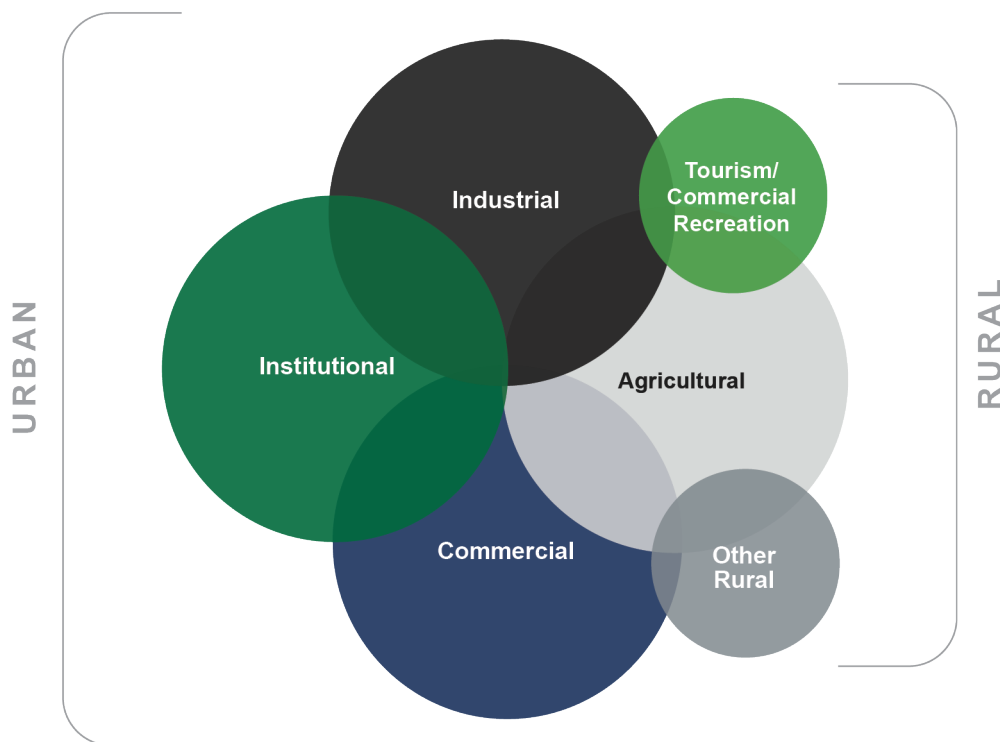
- Statistics Canada, Census Data 2006-2021
- CoStar market inventory data
- Regional Population Projections from 2024 to 2046, prepared by Rennie
- Regional Employment Projections from 2023 to 2046, prepared by Deloitte

Employment Land Analysis Classes

Employment land uses were classified into six primary Employment Land Analysis Classes (ELAC), which represent typical land use activities tied to economic function and land use policy. These analysis classes were proposed based on the general characteristics of lands that accommodate employment and economic function in the region.

At a high level, the employment land uses fall under two broad categories: urban and rural.

Figure 2. Conceptual Diagram of Employment Land Analysis Classes



Urban employment lands account for employment typically found within urban areas and are often characterized by employment uses that require access to transportation and other physical infrastructure. These uses also tend to feature higher employment densities than rural activities and demonstrate a stronger linkage to built space within employment land. The ELAC that are considered urban are Commercial, Industrial, and Institutional.

Rural employment lands are typically located outside of the urbanized area, often tied to the area of land rather than built space, and often less infrastructure dependent. The ELAC that are considered rural are Agricultural, Tourism/Commercial Recreation, and Other Rural.

Employment Activities within ELAC Categories are Not Mutually Exclusive

The ELAC categories represent a tool to understand the linkage between different land use types based on common characteristics of employment activity, characterized by their employment sector, and legal permissions as set forth by local bylaws and policy documents. While the ELAC classes are based on a detailed review of permitted OCP, Land Use Plan and zoning permissions, the range of permitted uses and general flexible nature of employment activities means that these categories are not rigid. Economic activities within each class may feature some types of employment and ancillary functions that would typically be observed in other classes (e.g. commercial retail show rooms and small offices in industrial areas, restaurants located in institutional hospital and educational campuses, etc.).

A summary of the Employment Land Analysis Classes is as follows:

Urban

- **Commercial** – Retail, service and office uses, including most mixed-use spaces that span across a range of formats (e.g. standalone buildings, commercial malls, ground floor storefronts, and other mixed employment spaces). For the region, this typically includes commercial in urban centres and along main streets, neighbourhood commercial retail, and comprehensive mixed-use development districts.
- **Industrial** – Economic activities typically associated with the manufacture, storage, or transportation of goods and materials, typically located in factories, warehouses, logistics facilities and business parks. This category also includes the airport, landfills, wastewater treatment plants and facilities, as well as other civic properties. Unlike the other two urban land uses, employment in this class may be more land extensive and less reliant on built space (e.g. outdoor storage facilities, works yards, etc.), though general shortages of industrial land and new forms of industrial intensification have seen a steady shift towards higher density forms of industrial development. Industrial employment activity also may result in unwanted nuisances (i.e. noise, heavy truck traffic, odours, etc.) that make it less compatible with mixed-use formats and in close proximity to sensitive uses, like residential.
- **Institutional** – A mix of civic functions including schools, primary healthcare facilities, and municipal halls. Employment activities under this classification are often planned to function separately from other population-serving commercial functions, though they can also occur in mixed-employment and mixed-residential formats (e.g. a childcare facility or library located at grade with residential occupying the floors above).

Rural

- **Agricultural** – Lands used for farming and other agricultural uses, including both those located within the Agricultural Land Reserve (ALR)⁵ and those that are not. May also include employment associated with the production of food and processing of compost located on lands primarily designated for agricultural uses. Excludes agricultural and rural residential estate lots that feature little to no agricultural production.
- **Tourism / Commercial Recreation (TCR)** – Tourist-oriented uses including hotels and resorts, private recreational properties (including some private golf courses), and other tourist-oriented commercial services that are not typically found within the urbanized area. Unlike other urban commercial uses, these activities tend to be more land extensive and have specific locational preferences that make them distinct. These uses play a notable role in the region given the economic importance of tourism and the visitor economy.
- **Other Rural** – Uses that are primarily extractive in function and including lands for hunting and other non-urban categorized lands. The Other Rural category also includes lands where agricultural uses are not the primary or priority function. May feature a range of employment activities not located in the urban area, including smaller industrial, repair and service functions.

Employment Lands with Residential Permissions

Land use policies for some employment areas also permit a range of mixed residential uses, most commonly in Commercial, Institutional and, in some cases, Industrial areas. These areas permit the mixing of residential and employment uses within the same sites, which may create competition within the land base between the different functions. Due to the disparate land economics between residential and different employment uses, residential uses often outcompete the development and retention of employment space in these areas unless otherwise protected or required by policy (e.g. requirements to provide commercial at grade along main streets and in areas of high urban density). The RELI identifies lands within each ELAC where residential uses may be permitted as a primary or standalone function, noting that the inclusion of significant residential uses could limit the potential of these lands to support employment functions⁶.

⁵ The ALR is a provincial designation in which agriculture is recognized as the priority use and is intended to help preserve agricultural land for farming and ranching purposes.

⁶ The 'Residential Permitted' flag was developed with guidance from local planning staff. Employment lands that permit residential uses as a secondary or supporting use (ex. a single residential caretaker unit on an Industrial site, or single detached home on a Rural or Agricultural site) are not included in this Residential Permitted sub-category.

Ancillary Employment Uses in Residential Lands

In a similar vein, some jurisdictions feature residential areas where some accessory retail and service uses may be permitted. These can include permission for neighbourhood corner stores or small commercial retail elements in what otherwise is a residential only area. While these areas can accommodate a small measure of employment, economic activity is typically ancillary to the primary residential use and not considered a significant contributor to the RDCO's ability to accommodate economic activity. For this reason, these lands are not considered major contributors to the RELI beyond sites where an existing employment use was already established at the time of inventory preparation.

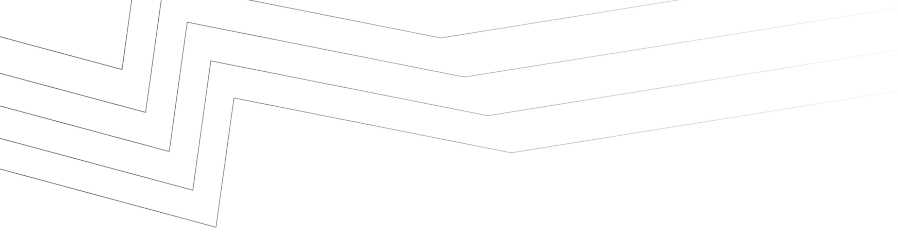
Approach to ELAC Sorting

ELAC classes in the RELI represent the intended use under current policy. As such, each site is classified primarily based on the Future Land Use designation established in current their respective municipal OCP or Land Use Plan.

As a first step to preparing the RELI, the project team undertook a comprehensive review of local land use policies to produce a reference index of Future Land Use (the intended use of the land) and Zoning (the current as-of-right use permissions of the land) designations to identify and classify employment lands into one of the six ELAC, according to the employment category that best fits. A summary of this index and the associated ELAC assumptions is provided in **Appendix B**.

From here, available geospatial land use policy layers provided by each partnering community were reviewed before being incorporated into the RDCO's parcel fabric layer to generate an **Employment Analysis Polygon (EAP)** layer. This enriched parcel layer contains attributes necessary for the inventory identification and classification process, including site area, address, Future Land Use designation, current zoning, and additional data from BC Assessment including information on the occupancy of the site, its current use, and the assessed value of land and structures on the property.

By joining the index and EAP layer, the ELAC codes were then assigned to each parcel based on applicable Future Land Use and Zoning features. Additional scripts were run to identify any overlapping parcels and elements to remove instances of duplicated land area and relevant data was amalgamated for multiple units located on the same parcel, as often happens in the case of stratified properties. Additional manual edits were made based on feedback provided by the Technical Committee to resolve data discrepancies and land use changes that had not yet been reflected in the open data source mapping layers.



The EAP was then further enriched by merging additional fields to flag factors that may influence the supply of occupied and vacant land. This includes flagging occupied ‘soft sites’ that may have potential to redevelop at higher densities based on the ratio of assessed land and improvement values; parcels that may have potential constraints including the need to be rezoned and serviced; and those that have permitted residential uses that may compete with, or limit employment uses, were flagged in the analysis to assist with the estimation of employment supporting lands.

What are Soft Sites?

‘Soft Sites’ are properties currently occupied by their intended employment use but may be underutilized relative to other employment lands in their category, representing potential candidates for redevelopment at higher densities. The method used to identify these sites for the purposes of the RELI is discussed further on in the report.

Limitations to the Analysis

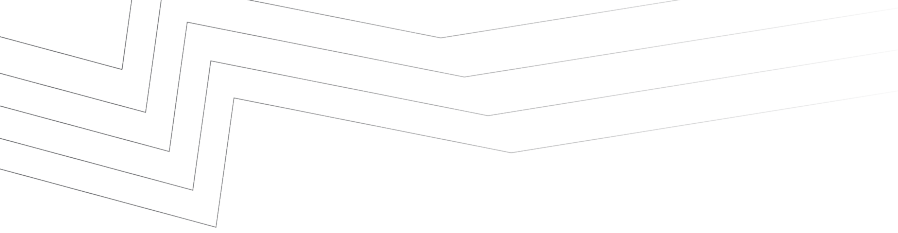
When utilizing different data sources for complex analysis, it's important to be aware of several limitations. The time of publication can lead to discrepancies, as data may be outdated or not reflective of current conditions. Geographic differences can result in variations in data relevance, and the granularity of data inputs may affect the level of detail available, potentially overlooking critical nuances. In developing the RELI for the RDCO, the project team has made every effort to review and validate data, and in doing so must note the following limitations:

Estimating Employment at the Parcel Level

At its core, the employment utilization and demand analysis contained within the RELI relies on an estimate of the number of jobs that are tied to different types of land within each jurisdiction.

The primary data source for employment that notes both job type and regularly reported place of work at this geographic level comes from the Statistics Canada Census, which is produced once every five-years. Statistics Canada produces special runs of employment data at the Census Subdivision level (i.e. municipal and First Nation reserve boundaries) on request to include employment by industry activity, as classified by the North American Industrial Classification System (NAICS), based on place of work status. This is the smallest geography available that allows for distinction of employment activity of this nature.

NAICS code information is broken out into categories and sub-categories represented by the number of digits, ranging from 2-digits (high-level sectors), all the way down to 6-digits (specific industry activities). Due to privacy concerns, Statistics Canada rounds employment counts by NAICS code to the nearest 5, making analysis of smaller categories challenging, particularly at



the local jurisdictional level where these groupings may only encapsulate a few jobs in total. For this reason, the RELI analysis relies on employment figures at the 3-digit (sub-sector) level when estimating employment activity between different land use categories (ELAC). This approach helps to mitigate the impacts of Statistics Canada rounding while still providing a general idea of which employment activities are located in which types of land, though there are instances where some subsectors may be split between more than one ELAC. In these cases, the study team conducted a review of 4- to 6-digit NAICS code definitions and counts at the regional level to estimate the share splits between ELAC classes at the local level. This classification exercise was developed in partnership with Deloitte and was similarly applied to the development of the employment projections to ensure conformity with the employment land demand estimates.

The COVID Pandemic and the 2021 Census

The primary source of data used in this analysis regarding employment located in each local jurisdiction is from Statistics Canada, most notably the Census of Canada. The Census serves as the foremost tool for assessing local and regional change over time in Canada and is one of the only standardized accounts of employment between local jurisdictions over time.

Because the Census is only conducted once every five years, it limits the ability to conduct comparisons and track certain sectoral trends in the interim period. The data from the most recent Census data is also considered challenged on account of when the most recent survey was conducted, in May of 2021. This occurred at a time when the impacts of the COVID-19 pandemic and the related lockdowns were still acute, with only some businesses operating in a traditional manner, with others in the process of furloughing workers or temporarily shutting down.

The pandemic also resulted in significant shifts in where and how we work, meaning that the most recent data collected may not be representative of future economic and employment trends, most notably evident by a surge in respondents listing Working From Home as their primary place of work in the 2021 Census. While this was likely indicative of many respondents' status at the time of reporting, many workers have since been called back to a Usual Place of Work. As a result, some data specific to the Region's employment activities from the 2021 Census may not be truly representative of actual employment counts, locational preferences and trends as we emerge from the shadow of the pandemic.

Where possible, the project team has conducted additional trend-based analysis to contextualize the findings of the 2021 Census and to inform assumptions looking forward. This includes a trend review at the census subdivision level for each jurisdiction in the preceding three census periods (2006, 2011, and 2016), a high-level review of trends from the Labour Force Survey, which is prepared monthly at the Census Metropolitan Area (but excludes First Nations), and accounting for economic indicator data from market brokerages and similar economic surveys.



Employment Land Classification and BC Assessment Data

The process of creating the EAP relies on automated scripts that merge the shapefiles for legal parcels with BC Assessment data and local Zoning and Future Land Use layers. In rare instances, Zoning and Future Land Use layers did not overlap cleanly with the parcel layer, resulting in more than one zone or land use permission applying to a portion of the parcel. ***Due to the challenges in breaking out other data sources, such as assessment data, on a pro-rated basis, the RELI model instead attributes the ELAC class based on whichever zone and Future Land Use covers the core of the parcel.*** This may result in deviations in the total area for certain permitted land uses.

2. REGIONAL EMPLOYMENT LANDS INVENTORY

The RELI includes 56,741 ha of designated employment land, broken out across various types of Employment Land Analysis Classes (ELAC). This section summarizes the current inventory based on the classification system, including key statistics involving vacancy, potential development constraints and information on how these lands are utilized.

The Employment Lands Inventory at a Glance

The Regional Employment Lands Inventory identifies, classifies, and assesses the status of employment-supporting lands across the Central Okanagan region. This tool assigns each parcel with non-residential permissions to standardized ELAC groupings based on overlapping Future Land Use and Zoning features. This approach enables a high-level assessment of the employment lands across the region and within each local jurisdiction based on occupancy as tracked by BC Assessment. For additional details on how land uses were categorized, refer to **Appendix B**.

The following tables in this section provide an overview of the Central Okanagan Region's employment lands supply, detailing:

- **Parcels:** Total number of parcels within each ELAC
- **Occupied:** All sites within the ELAC considered to be actively occupied by a functional improvement or otherwise utilized for productive use according to BC Assessment
- **Vacant:** All sites within the ELAC that either do not feature a functional improvement or are not otherwise utilized for productive use according to BC Assessment
- **% of Total:** The share of all regional employment land (by area) that belong to this ELAC

What Counts as Occupied or Vacant Land?

The occupancy status of lands in the RELI relies on determinations made by BC Assessment. Staff at BC Assessment include consideration of the occupancy status of a property as part of their regular review to update the assessed value of improvements and land on each property for taxation purpose. Typically, a parcel is considered occupied if: it contains a structure or improvement that shows signs of active use and is not considered derelict; if the parcel is being actively used in support of an adjacent occupied use (e.g. a paved parking facility or material storage lot); or if there are signs of active productive use of the land (e.g. tending of crops and fields, herding of livestock, etc.).

Regional Inventory

A high-level summary of the Regional Employment Lands Inventory, including occupied and vacant land, is provided in Table 1 below, and mapped in Figure 3 on the following page.

Table 1. Employment Land Distribution, Central Okanagan Region

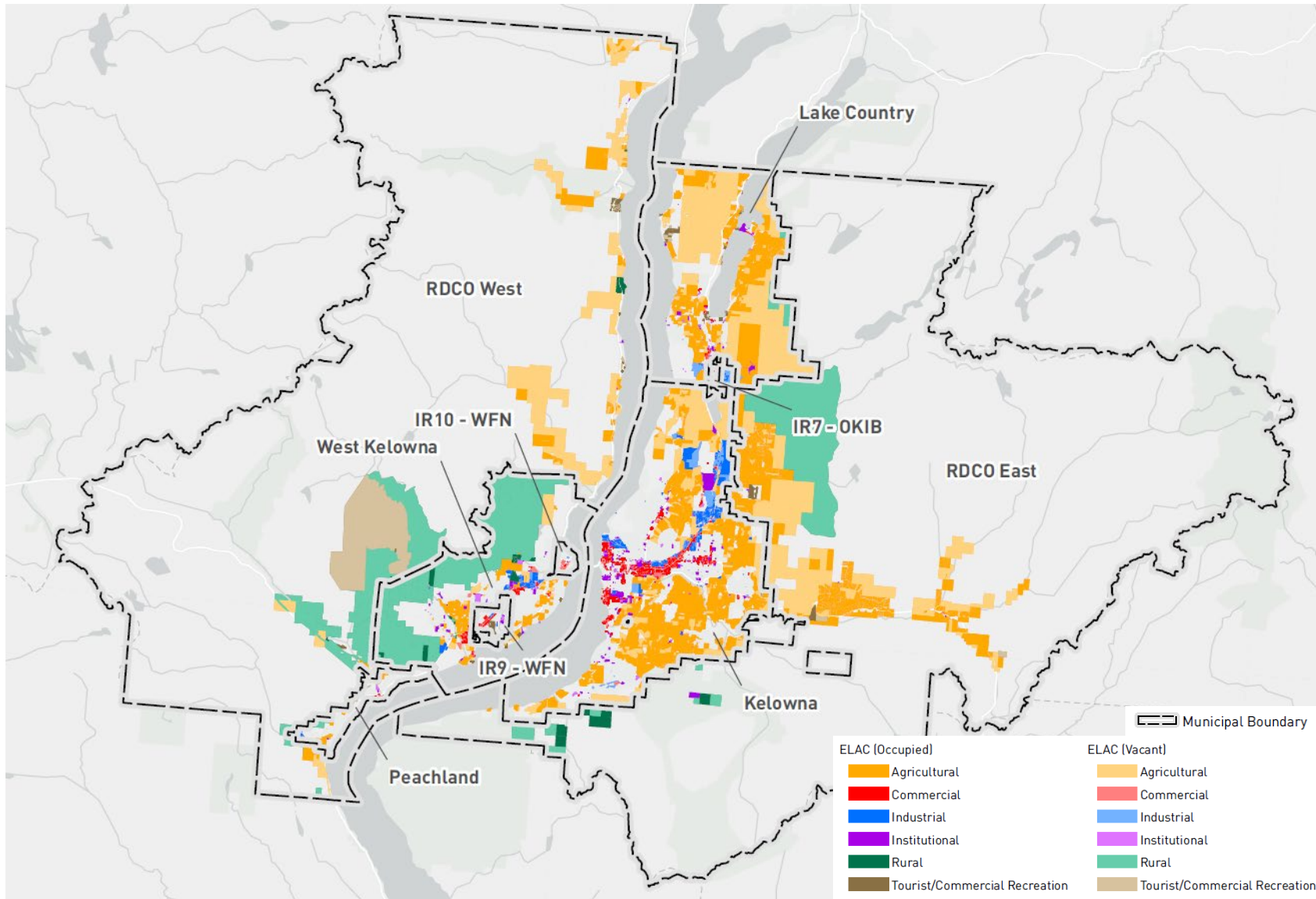
Central Okanagan Region Lands Distribution Overview (ha)					
Total Central Okanagan Region Employment Lands: 56,740.9 ha					
Commercial 1,036.2 ha	Parcels	2,558	Agricultural 33,630.1 ha	Parcels	3,992
	Occupied	877.2 ha		Occupied	16,310.6 ha
	Occupied & Zoned	642.8 ha		Occupied & Zoned	13,189.7 ha
	Vacant	159.0 ha		Vacant	17,319.5 ha
	% of Total	1.8%		% of Total	59.3%
Industrial 1,795.7 ha	Parcels	945	Tourism / Commercial Recreation 3,338.8 ha	Parcels	617
	Occupied	1,198.6 ha		Occupied	310.9 ha
	Occupied & Zoned	1,044.9 ha		Occupied & Zoned	113.7 ha
	Vacant	597.1 ha		Vacant	3027.8
	% of Total	3.2%		% of Total	5.9%
Institutional 720.0 ha	Parcels	583	Other Rural 16,220.0 ha	Parcels	103
	Occupied	654.4 ha		Occupied	778.2 ha
	Occupied & Zoned	488.4 ha		Occupied & Zoned	457.7 ha
	Vacant	65.6 ha		Vacant	15,441.8 ha
	% of Total	1.3%		% of Total	28.6%

Source: B&A Studios, using data from RDCO, local jurisdictions, and BC Assessment

What is Meant by Occupied and Zoned?

The inventory is primarily distinguished by OCP or Land Use Plan Future Land Use (FLU) designations, which indicate overarching policy direction for long-term use. However, not all current uses match the FLU designation. In several cases, the current in-force zoning differs from the FLU, indicating that the current use may not be actively represent the intended employment function. While some of these non-conforming uses may represent ancillary or supportive activities (e.g. a restaurant located within an industrial area that primarily serves local workers), others may be occupying lands that could otherwise be utilized for additional economic activity. Lands that are both occupied and zoned to match the ELAC are identified as a subset of the total occupied supply to demonstrate the utilization of existing land, and to highlight the potential additional supply that is being occupied by other uses.

Figure 3: Regional Employment Lands Inventory, Central Okanagan Region



Source: B&A Studios, using data from RDCO, local jurisdictions and BC Assessment



URBAN EMPLOYMENT LANDS

Urban ELAC groupings account for approximately 3,552 ha, or 6.3% of the total inventory by area. While smaller in terms of relative area and share, these lands comprise most of the employment and economic activity within the Central Okanagan region. These lands tend to be much more densely utilized, with much lower rates of vacant land.

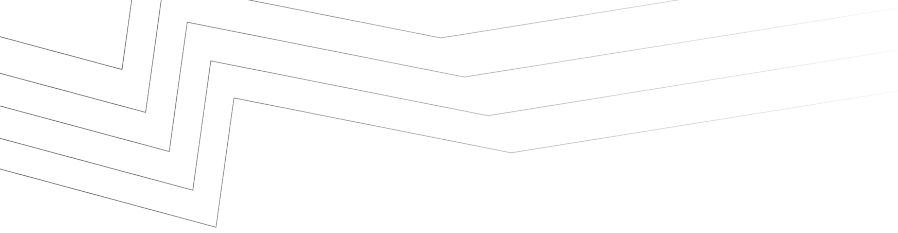
Commercial designated lands in the region total approximately 1,036 ha (1.8% of total), encompassing a range of uses, from small retail standalone storefronts, strip malls and service centers, to large highway focused retail power centers and freestanding offices. Averaging only 0.4 ha per parcel, properties in this ELAC also tend to be notably smaller than those in other categories. About 160 ha (15%) of the region's Commercial land is flagged as vacant, while an additional 234 ha of occupied Commercial land is currently zoned for other uses, most of which tend to be residential in nature. Commercial employment uses do tend to have better prospects for mixing with residential uses than other ELAC categories, though this comes with a risk of net loss of employment space as existing Commercial projects are often redeveloped with only minimal ground floor employment if policy requirements do not dictate otherwise.

The inventory identifies 1,796 ha of Industrial designated land, making it the largest urban employment ELAC (3.2% of total inventory). At an average of 1.9 ha per parcel, properties in this category tend to be much larger than other urban employment uses, reflecting the unique nature and needs of many Industrial employment activities. One-third of the Industrial inventory (597 ha) is listed as vacant, most of which is located near the airport in northeastern Kelowna. However, this figure may be somewhat deceiving, as various constraints may make many of these sites less than ideal locations to accommodate growth, as is discussed further on in this report. It is also important to note that in Kelowna, certain currently vacant Industrial lands may be designated for airport, landfill, transit facilities, and other civic uses and not available to accommodate for other uses.

Institutionally designated lands represent the smallest ELAC in the region at only 720 ha, or 1.3% of the total. This class also features the lowest share of vacant land at approximately 66 ha (9%). While there is approximately 166 ha of designated Institutional land that is not currently zoned for Institutional uses, many of these non-conforming uses are comprised of parks and other civic features, which makes them unlikely candidates to accommodate additional growth.

RURAL EMPLOYMENT LANDS

Overall, the rural land use categories comprise the largest cumulative area of employment supporting lands, accounting for nearly 53,189 ha, or over 93% of all designated employment lands in the inventory. This is not surprising given the land extensive nature of the economic



activity associated with these lands, and the significant area that has been designated for their use outside of the urban built-up areas.

Agricultural uses account for the largest ELAC in the region, accounting for approximately 33,630 ha, or almost three-fifths of the total employment land inventory. Much of this supply falls within the Agricultural Land Reserve, indicating provincial direction that these lands are to be reserved for approved agricultural activities. However, less than half of the identified Agricultural ELAC supply is flagged as occupied, with approximately 13,190 ha both occupied and zoned for Agricultural uses. While it is likely that some of the lands listed as vacant may be used for other productive Agricultural purposes, like livestock grazing, and some vacant lands may feature geographic and soil features that limit their Agricultural potential, the available data appears to indicate that there is a considerable amount of vacant Agricultural lands to accommodate additional employment and productivity growth within these lands⁷.

Lands that fall under the Tourism / Commercial Recreation (TCR) (3,339 ha) and Other Rural (16,220 ha) ELAC groupings also represent a significant amount of the designated employment land inventory, accounting for 5.9% and 28.6% of the total regional inventory, respectively. However, an even greater share of these two categories is flagged as vacant, with only 114 ha of TCR land and about 458 ha of Other Rural land being noted as being both occupied and zoned for their intended use. Some of these vacant and designated areas represent special study areas for future resorts and other regional investment projects, with the potential to absorb a considerable amount of employment demand. However, due to their location often far outside of the urban area, and the general lack of access to public infrastructure and transit also hinders their potential to accommodate near-term growth and investment except in certain specific cases.

Local Inventories

The RELI is further broken out for each municipality and First Nation community located within the region. While detailed breakdowns of supply by ELAC for each jurisdiction, including occupancy and constraints are provided in **Appendix A**, a high-level summary comparison between the City of Kelowna and the rest of the region is provided here to demonstrate some of the key distinctions between the central city and the rest of the Central Okanagan.

⁷ Due to limitations in the available data, this study cannot qualify the productive potential of the vacant Agricultural land supply with regards to issues such as soil quality, irrigation and drainage, and other constraints. A Regional Agricultural Strategy is identified in the Regional Growth Strategy Priority Projects Plan and will help to inform and address actions to strengthen and protect agricultural activities.

Why Do Some Communities Show No Land in Certain ELAC?

Depending on policy permission, some jurisdictions lack Future Land Use categories that align cleanly with one or more ELAC categories. This is more common in rural categories, which have been broken out at the request of the Technical Team to reflect the nuance of certain economic activities in the Central Okanagan.

In the case that a given jurisdiction does not feature land in an ELAC, local jobs that are assumed to locate in that category are instead reallocated to the next best ELAC for which designated land is present. For example, while the City of Kelowna features a significant supply of Agricultural land, it does not have polices that clearly distinguish direction exclusively for TCR or Other Rural land uses. Jobs associated with these activities are primarily accommodated under Kelowna's Commercial and Agricultural lands, respectively.

The following table summarizes the employment lands distribution for the City of Kelowna.

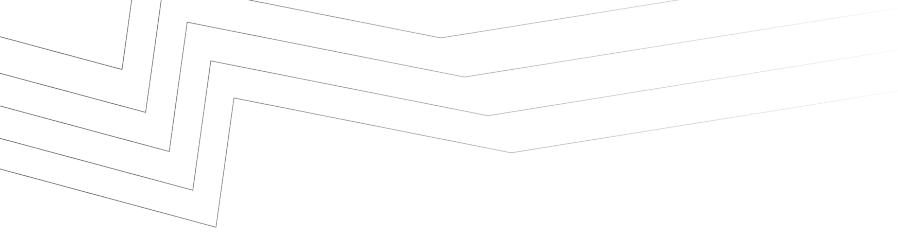
Table 2. Employment Land Distribution, City of Kelowna

City of Kelowna - Employment Lands Distribution Overview (ha)					
Total City of Kelowna Employment Lands: 11,964.9 ha					
Commercial 624.6 ha	Parcels	1,480	Agricultural 9409.2 ha	Parcels	1,842
	Occupied	565.0 ha		Occupied	6,375.1 ha
	Occupied & Zoned	487.6 ha		Occupied & Zoned	5,647.9 ha
	Vacant	59.7 ha		Vacant	3,034.1 ha
	% of Total	5.2%		% of Total	78.6%
Industrial 1521.0 ha	Parcels	725	Tourism / Commercial Recreation 0 ha	Parcels	-
	Occupied	999.2 ha		Occupied	-
	Occupied & Zoned	874.4 ha		Occupied & Zoned	-
	Vacant	521.8 ha		Vacant	-
	% of Total	12.7%		% of Total	-
Institutional 410.1 ha	Parcels	408	Other Rural 0 ha	Parcels	-
	Occupied	379.0 ha		Occupied	-
	Occupied & Zoned	325.3 ha		Occupied & Zoned	-
	Vacant	31.1 ha		Vacant	-
	% of Total	3.4%		% of Total	-

Source: B&A Studios, using data from RDCO, City of Kelowna and BC Assessment

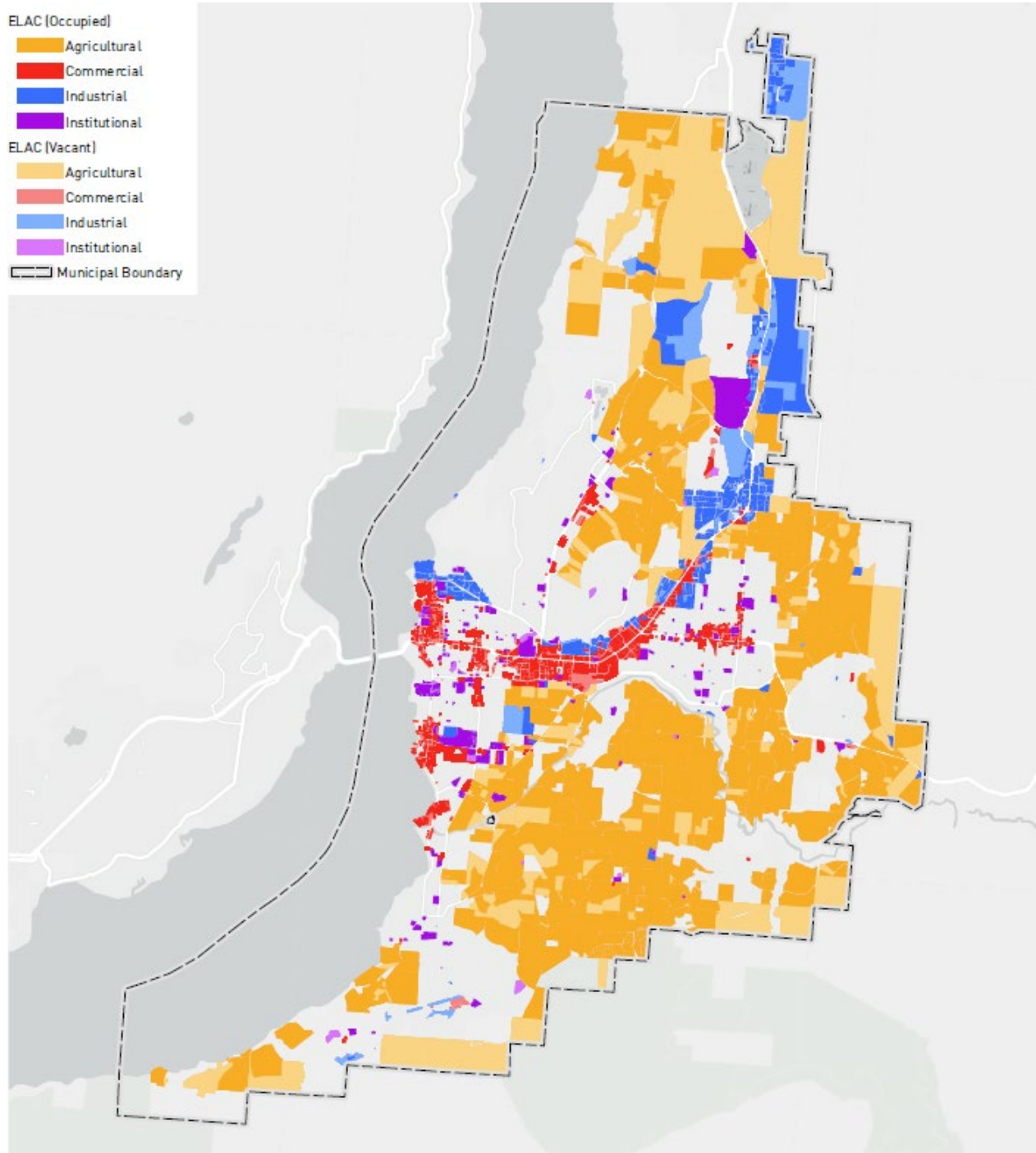
Totalling up to nearly 11,965 ha, Kelowna contains over 21% of the region's employment lands. Key findings are as follows:

- Nearly four-fifths of this supply is designated for Agricultural uses, primarily located along the urban periphery and most of which is designated as Agricultural Land Reserve.

- 
- As the urban and economic core of the Central Okanagan, the City accounts for 60.2% of the region's Commercial land, 84.7% of its Industrial land, and 56.9% of its Institutional land.
 - Kelowna's Future Land Use permissions are quite broad when it comes to allowing the mixing of Commercial and residential uses, including most of the City's designated Urban Centres and permissions for small scale retail and population serving uses in the majority of established residential neighbourhoods. While this may suggest an even larger supply of land that could potentially support Commercial employment growth, **it is important to note that the current economics of land development heavily favour residential uses, limiting the likelihood that a significant amount of employment supporting space will be delivered in these areas where not explicitly required as a condition of redevelopment.** For this reason, the inventory of the Commercial employment lands in Kelowna excludes Mixed Use parcels that do not front onto designated High, Retail, and Mixed Residential Streets in the Urban Centres.
 - In terms of Institutional employment lands, Kelowna General Hospital, Okanagan College and UBC's Okanagan Campus contribute the most in addition to local institutional land.
 - Kelowna's Industrial lands are regionally significant, including several key clusters along the Okanagan Highway corridor, the North End, and much of Northern Kelowna. These lands also include the Kelowna International Airport and Glenmore Landfill, both of which are large in area but comparatively lower in employment density than most other Industrial lands by nature of their function.
 - The City features approximately 522 ha of the region's 597 ha (87%) of vacant industrial land, much of which is located in Northern Kelowna. While this quantity of vacant land is significant, over half is considered constrained due to a myriad of issues, including site topography, environmental constraints, or lack of immediate access to public infrastructure. These issues, which are discussed further down in this section, do not necessarily prohibit the use of these lands for employment functions, but may limit the types of supportable economic functions and investment that can occur. It has been noted that significant plots of vacant land have also been designated for future civic uses such as airport, landfill, and wastewater treatment facilities and are not available for future use.

A reference map of Kelowna's employment lands is provided in Figure 4 on the following page.

Figure 4: Regional Employment Lands Inventory, City of Kelowna



Source: B&A Studios, using data from RDCO, City of Kelowna and BC Assessment

Table 3 summarizes the distribution of employment lands across the rest of the region.

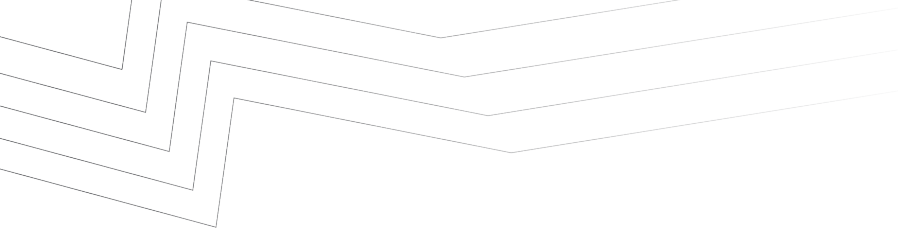
Table 3. Employment Lands Distribution, Central Okanagan, Excluding City of Kelowna

Central Okanagan, Excl. City of Kelowna - Employment Lands Distribution Overview (ha)					
Total Central Okanagan, Excl. City of Kelowna Employment Lands: 44,776.0 ha					
Commercial 411.5 ha	Parcels	1,078	Agricultural 24,220.9 ha	Parcels	2,150
	Occupied	312.2 ha		Occupied	9,935.5 ha
	Occupied & Zoned	155.2 ha		Occupied & Zoned	7,541.8 ha
	Vacant	99.3		Vacant	14,285.4
	% of Total	0.9%		% of Total	54.1%
Industrial 274.7 ha	Parcels	220	Tourism / Commercial Recreation 3,338.8 ha	Parcels	617
	Occupied	199.4 ha		Occupied	310.9 ha
	Occupied & Zoned	170.5 ha		Occupied & Zoned	113.7 ha
	Vacant	75.3		Vacant	3,027.8
	% of Total	0.6%		% of Total	7.5%
Institutional 310.0 ha	Parcels	175	Other Rural 16,220.0 ha	Parcels	103
	Occupied	275.4 ha		Occupied	778.2 ha
	Occupied & Zoned	163.1 ha		Occupied & Zoned	457.7 ha
	Vacant	34.6		Vacant	15,441.8 ha
	% of Total	0.7%		% of Total	36.2%

Source: B&A Studios, using data from RDCO, local jurisdictions, and BC Assessment

Beyond the City of Kelowna, employment land opportunities are slightly more dispersed, with key findings below:

- Most Commercial lands are concentrated in West Kelowna (187 ha) and Westbank First Nation (IR #9 & IR #10, totaling 105 ha), accounting for nearly three quarters of the regional supply outside of Kelowna between the two. The remaining supply of Commercial land is primarily comprised of smaller service centers in the other communities.
- West Kelowna also accounts for the largest share of designated Industrial (166 ha) and Institutional land (132 ha) throughout the rest of the Central Okanagan. It is followed by Lake Country, which features 48 ha of Industrial land (over 44 ha of which is flagged as vacant) and 96 ha of Institutional land.
- At nearly 8,873 ha, Lake Country features the largest supply of Agricultural land outside of the City of Kelowna. It is followed by RDCO East (8,796 ha), RDCO West (5,236 ha), West Kelowna (1,207 ha), and Peachland (109 ha).
- Tourism / Commercial Recreation uses are found across the region in various resort communities and private recreational properties, with the largest supply located in RDCO



West (2,975 ha), most of which is on account of the vast area designated for the Crystal Mountain Resort under the Rural Westside OCP. In practice, the current resort facility itself is quite small (4.3 ha), with the rest of the designated Future Land Use area encompassing most of Mount Last considered otherwise vacant.

- West Kelowna has the most land designated for Other Rural uses (6,223 ha), followed by RDCO East (5,601 ha), RDCO West (3,952 ha), Lake Country (332 ha) and Peachland (113 ha).
- With the exception of a few designated TCR uses located in IR #9 (44 ha), Westbank First Nation (IR #9 and IR #10) and the Okanagan Indian Band (IR #7) do not feature Future Land Use policies that align with the Agricultural, TCR or Other Rural ELAC categories. Any employment associated with these lands is assumed to fall under their Commercial designated lands.

Development Constraints on Vacant Land

Even though a parcel of land may be flagged as vacant by BC Assessment, this does not necessarily mean it represents an easy opportunity to accommodate future growth. Site constraints, including physical topography, environmental restrictions, access to public services, or others, may hinder or even prevent the development of a vacant site for future employment uses. While the factors that influence redevelopment potential will vary from site-to-site and use-to-use based on a myriad of factors, the RELI flags vacant lands based on the presence of commonly identified constraints. These include:

- **Access to Physical Infrastructure** – Is the site located within 100m of public road, water, and sanitary sewer connections?^{8,9,10}
- **Access to Frequent Transit Service** – Is the site located within a 400m walkshed of transit stop serviced by a Rapid or Frequent Service line (less than 20-minute headways)?

⁸ Also accounts for access to major infrastructure servicing agreement areas that are not directly provided by regional municipal partners. As detailed linear infrastructure location data was not provided for these areas, the RELI assumes all parcels within these areas are considered serviced.

⁹ While the RELI also identifies sites with public stormwater services, this infrastructure is much newer and less developed in many parts of the region. Coupled with the fact that many employment uses can mitigate this issue via on-site stormwater management systems, stormwater access is not included as part of this constraint flag.

¹⁰ For a site to be considered 'To Have Access to Infrastructure' it must be located within 100m of each of roads, water and sanitary linear infrastructure. If one is missing, the site is considered to be missing servicing for the purpose of the land constraint summary.

- **Is the Site Otherwise Constrained** – Is more than half of the site area subject to a steep slope (more than 20% grade) or subject to an Environmentally Sensitive Area policy restriction (e.g. Regional Ecosystem Connectivity Corridor, Sensitive Drainage Areas, Sensitive Ecosystems, Vulnerable Groundwater Aquifers, Watercourses and Riparian Areas)?

A summary of the vacant land supply including potential constraints is provided in Table 4 below.

Table 4: Vacant Employment Land Inventory by ELAC and Constraint Status

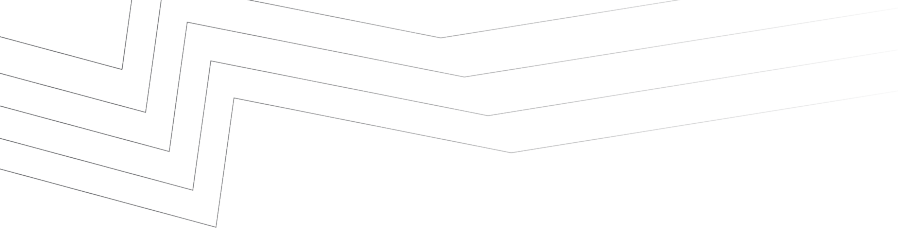
Vacant Employment Land Inventory by ELAC and Constraint Status				
ELAC	Vacant Land Total (ha)	Has Access to Infrastructure* (ha)	Has Access to Frequent Transit* (ha)	Not Otherwise Constrained* (ha)
Commercial	159.0	136.6	75.0	49.0
Industrial	597.1	409.4	163.6	80.4
Institutional	65.6	51.0	14.4	31.5
Agricultural	17,319.5	1,718.5	803.8	1,309.4
TCR	3,027.8	38.1	0.3	7.4
Other Rural	15,441.8	4,132.4	-	153.1

Source: B&A Studios, using data from RDCO, local jurisdictions and BC Transit

Note: * Constraint statuses are not mutually exclusive and do not necessarily sum to total.

The constraint figures shown represent access to existing infrastructure and transit services. The RELI also includes consideration for planned infrastructure and transit expansion, with additional details provided in **Appendix A**.

- The majority of vacant Commercial and Institutional employment lands feature access to physical infrastructure servicing. However, a much lower share feature access to frequent transit, which may hinder access to both customers and workers.
- Over two thirds of the region’s vacant Industrial land has immediate access to physical infrastructure servicing, and just under one third has access to frequent transit service. While some Industrial uses may not require such linkages, improving access will likely improve opportunities for higher density economic activities on these sites.
- A significant majority of rural lands, including Agricultural, TCR and Other Rural uses, feature limited access to physical infrastructure and transit services, and may feature difficult terrain or environmental restrictions. However, the rural nature of these activities



also means they are often less dependent on servicing and therefore less impacted by these constraints when compared to urban employment activities.¹¹

- While there are local plans to expand individual public services (roads, water or sewer) to sites that currently do not have access in North Kelowna and other parts of the region, most planned expansions will not offer all three services, resulting in these sites still being flagged as lacking full access to infrastructure. Depending on what infrastructure services are available, some sites may be more appropriate for certain employment lands over others and may require additional considerations.

Underutilized Lands and Other Opportunities for Additional Supply

While properties listed as vacant represent the most likely candidates to accommodate future economic growth, the RELI also recognizes other types of existing land that could redevelop and intensify over time, creating more opportunities to add employment within the existing supply of designated employment land. Two types of additional infill potential sites are flagged as part of the RELI:

Occupied Employment Lands where Zoning Does Not Match the ELAC:

There are several instances within the RELI where current zoning for occupied sites does not align with the intended employment activities associated with the ELAC. In some cases, these may be legal non-conforming uses that were established before the current land use direction, while others may be alternative non-employment uses that are permitted under certain mixed-use permissions contemplated by the municipal OCP or Land Use Plan. Depending on the nature of the non-conforming use and market economics at the time, these properties may eventually redevelop for employment uses, creating additional employment supply within the existing land base.¹²

Soft Sites Amongst Existing Employment Uses:

Over time, as buildings age and permitted uses and densities increase, property owners may be incentivized to redevelop existing employment lands for higher and better uses, potentially accommodating expanded employment and economic functions. The pace of

¹¹ It is worth noting that Agricultural uses are often better suited to sites without significant slope or grade issues, which can be a significant constraint depending on what is being grown or raised.

¹² The chance of a non-employment use being redeveloped will depend heavily on the value of the existing use versus the potential uplift created through redevelopment. In instances where the existing non-aligned use is multi-family residential, is not considered likely that these uses will redevelop as employment uses under current market conditions unless otherwise required by policy. This is because multi-family residential uses currently tend to out-perform employment uses from a financial perspective.

change and triggers for such redevelopments are highly subjective, and will vary from use-to-use, site-to-site, and will often be dependent on market conditions and local policies (e.g. portion of mixed-use development required for employment activity). However, in urban markets with steady growth outlooks, it is not uncommon to experience a steady rate of infill redevelopment.

To account for this potential, the RELI utilizes BC Assessment data to create a ratio of the cumulative value of all improvements located on each parcel over the assessed land values of the land itself. This ratio provides a high-level proxy for redevelopment potential on the principle that higher assessed land values represent the potential for higher economic value that land can support. Lower improvement values relative to the land assessment indicate the economic value of the current structures are not keeping pace with that potential.

Recognizing that land values can vary wildly between different land uses and market areas, these ratios were broken out by ELAC class and jurisdiction, identifying the bottom 15th percentile of improvement to land ratios for lands that are currently occupied and zoned to match the ELAC. The 15th percentile threshold was chosen as a conservative estimate of the rate at which infill redevelopment might reasonably be expected to occur within the RELI projection timeline (discussed further in Chapter 3) based on a review of infill development patterns in other communities across Canada.

Table 5 summarizes these potential lands at the regional level.

Table 5: Central Okanagan Region Summary of Occupied Underutilized Lands

Central Okanagan Region Summary of Occupied Underutilized Lands			
ELAC	Zoning ≠ ELAC (ha)	Soft Sites (ha)	Underutilized Total (ha)
Commercial	234.4	103.1	337.4
Industrial	153.7	230.0	383.7
Institutional	166.0	68.7	234.7
Agricultural	3,120.9	1,914.8	5,035.7
TCR	197.2	32.9	230.1
Other Rural	320.6	131.2	451.8

Source: B&A Studios, using data from RDCO, local jurisdictions and BC Assessment

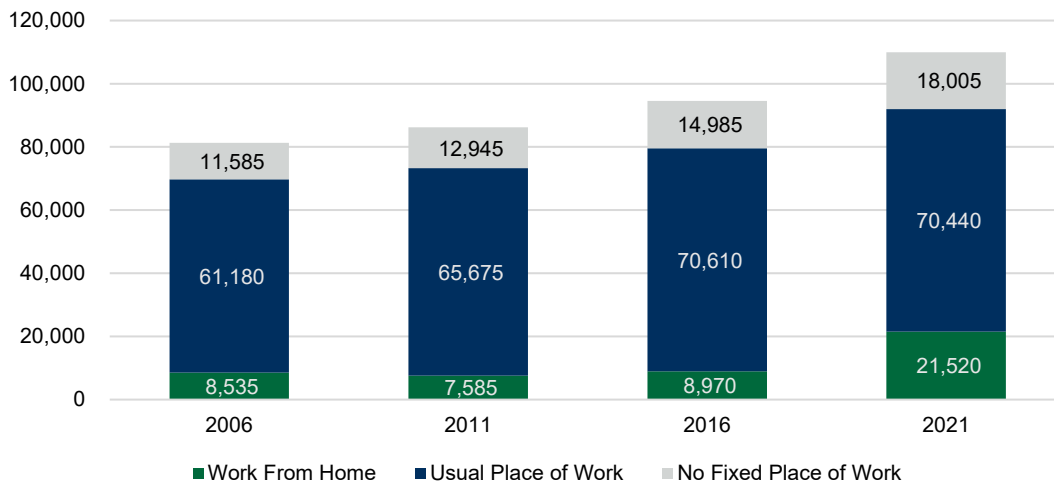
3. EMPLOYMENT LAND UTILIZATION ANALYSIS

The next step in the RELI analysis involved assessing historical employment and brokerage market data against the employment lands inventory to better understand the relationship between jobs and the land, and its implications for future demand.

Estimating Jobs in Each Employment Lands Analysis Class

Analysis of employment trends over time demonstrates the changing nature of work, and its implications for future land demand. The rate of growth in the Central Okanagan has been accelerating steadily over the past four Census periods (2006, 2011, 2016, and 2021), but recent events – including the disruption of the COVID-19 pandemic, have significantly impacted where jobs are located. As shown in Figure 5 below, while regional employment grew by over 16% between 2016 and 2021, almost all this growth occurred in the form of Work from Home jobs, which more than doubled over this period, while jobs reporting to a Usual Place of Work remained relatively flat. While this shift is likely overstated due to the timing of the Census, which was conducted during May of 2021 when many pandemic related restrictions were still in effect, the long-term implications of many businesses shifting towards remote and hybrid work arrangements have had a significant impact on the amount of space required for many employment activities.

Figure 5. Place of Work Trend Analysis, Central Okanagan Region, 2006, 2011, 2016 & 2021



Source: Statistics Canada

To understand the utilization of land and implications for future demand, Census employment figures are broken out into ELAC categories based on the sectors that best align with the employment activities likely to occur within each land type. To do this, employment was assigned to each of the six ELAC based on three-digit subsector NAICS codes. Table 6 provides several examples of how employment sectors are applied to different classes. A more detailed breakdown of these allocations is provided in **Appendix B**.

Table 6: Examples of Employment Sectors in each Employment Land Analysis Class

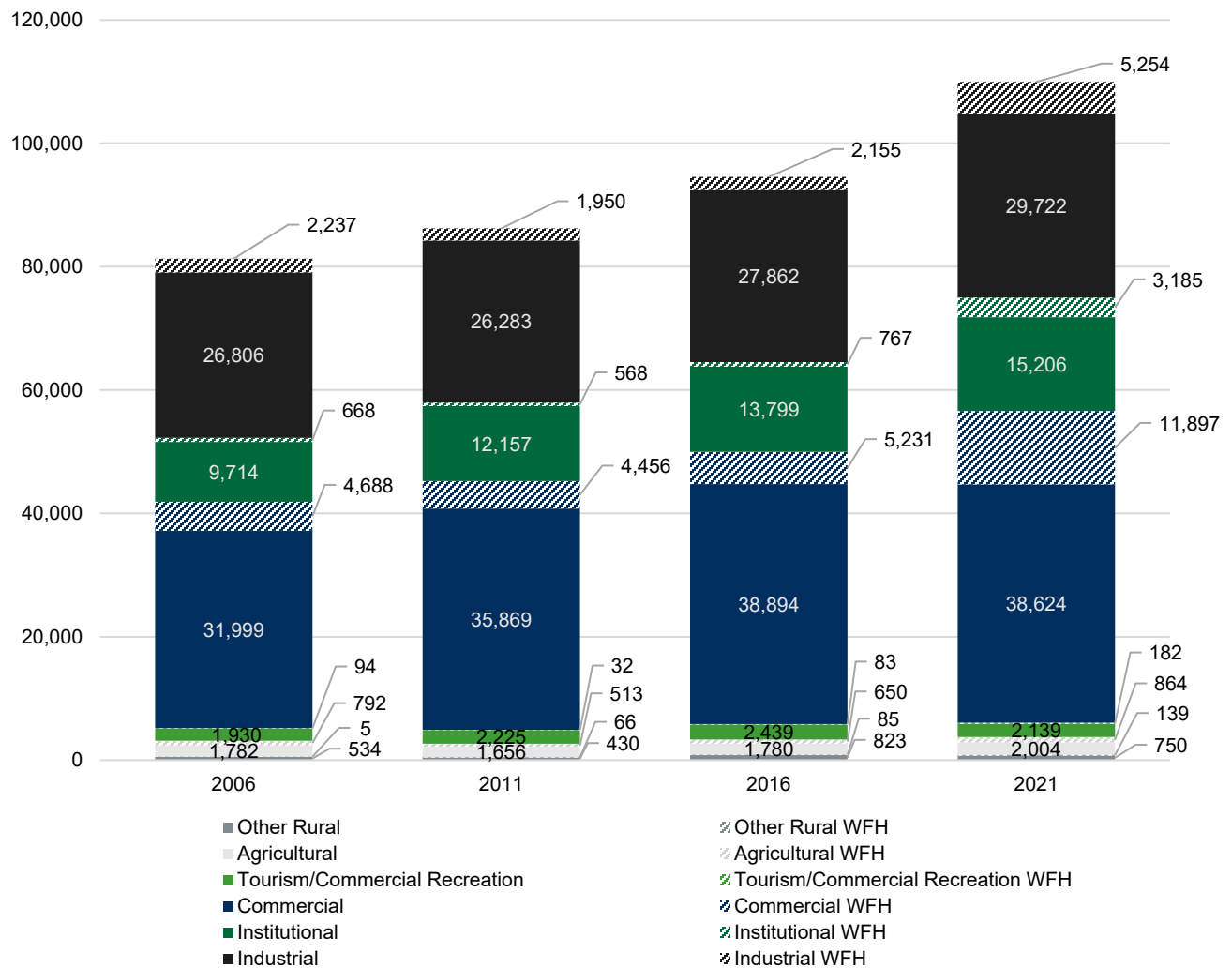
Employment Land Analysis Classes and Common Employment Sectors					
Commercial	Industrial	Institutional	Agricultural	Tourism / Commercial Recreation¹³	Other Rural¹³
Retail shops, office, restaurants, and other service-focused functions involving the exchange of goods and services to consumers	Production and distribution of goods, infrastructure, and other supporting services	Provision of a range of public assembly uses such as educational institutions, hospitals, and other public buildings	Farm focused employment, along with supportive activities	Tourist-oriented services and recreation establishments such as hotels and resorts, private golf courses, etc.	Primarily forestry and other extractive industries, along with supportive activities
<ul style="list-style-type: none"> • 44-45 Retail Trade • 52 Finance and Insurance 	<ul style="list-style-type: none"> • 22 Utilities • 23 Construction • 31-33 Manufacturing • 48-49 Transportation and Warehousing 	<ul style="list-style-type: none"> • 61 Educational Services • 62 Health care and social assistance • 91 Public Administration 	<ul style="list-style-type: none"> • 111-112 Farms • 115 Support activities for agriculture and forestry • 	<ul style="list-style-type: none"> • 713 Amusement, gambling and recreation industries • 721 Accommodation Services 	<ul style="list-style-type: none"> • 113 Forestry and logging • 114 Fishing, hunting, and trapping • 211 Oil and gas extraction 212 Mining and quarrying

¹³ The City of Kelowna does not have polices that clearly distinguish direction exclusively for TCR or Other Rural land uses. Jobs associated with these activities are primarily accommodated under Kelowna’s Commercial and Agricultural lands, respectively.

Employment Change Among Land Uses

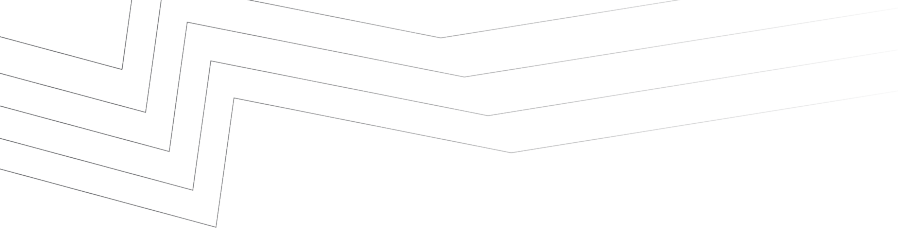
Estimated employment among each of the ELAC classes is summarized in Figure 6, with the changing rate of jobs tied to employment land¹⁴ and Work From Home employment highlighted in each category.

Figure 6. Employment Change by ELAC and Place of Work, Central Okanagan Region, 2006, 2011, 2016 & 2021



Source: B&A Studios, using data from Statistics Canada

¹⁴ For this analysis, jobs tied to employment land includes both jobs with a Usual Place of Work and jobs with No Fixed Place of Work. While the former may not regularly report to the same job site, these jobs are assumed to create induced demand for employment land by nature of their activity.



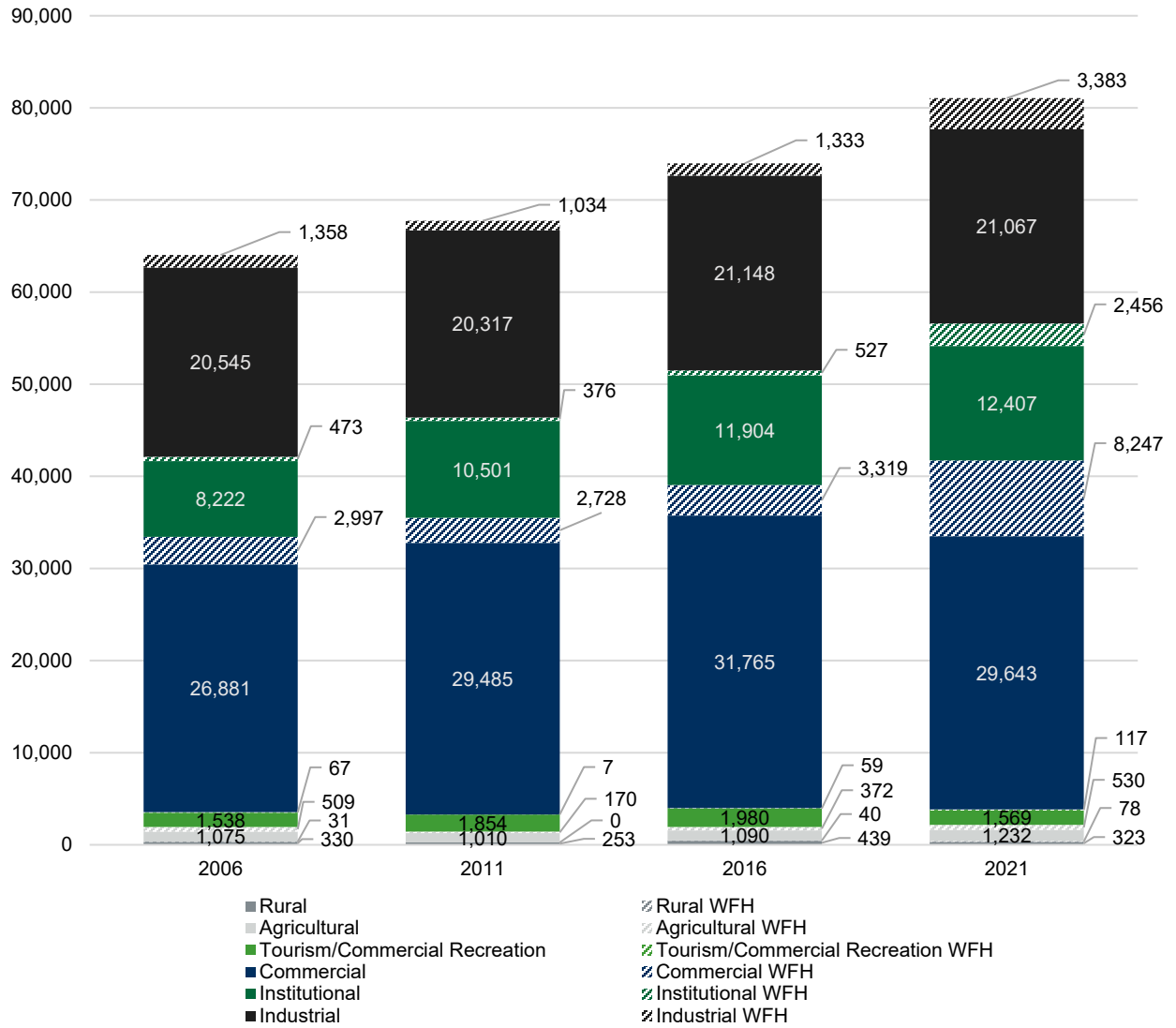
Key findings are as follows:

- The Commercial ELAC accounts for the most jobs by a considerable margin, followed by Industrial and Institutional. Job growth in these categories also accounts for the majority of new employment across the region. Meanwhile, employment in the rural land use categories is more modest.
- Between 2016 and 2021, Work From Home employment more than doubled in most categories and nearly tripled within Institutional employment. In terms of pure employment count, the biggest impact was seen in Commercial employment as WFH employment grew by 6,141. This is not altogether surprising as Commercial WFH had already been trending upwards pre-pandemic, largely on account of office employment experimenting with shorter work weeks and flexible forms of work prior to the pandemic.
- Despite the shift to Work From Home employment, employment land-based Industrial, Institutional, and Agricultural employment saw increases during the pandemic. The steady increase in employment land-based employment in the 10 years between 2006 and 2016 also indicates a trend towards continued land and space need prior to the pandemic.
- The relative share of Work From Home jobs in each ELAC has been relatively stable between 2006 and 2016. While the prevalence of WFH is not likely to fully return to the pre-pandemic levels in the future, trends to date indicate that the overall share of WFH will continue to decline back towards the historic mean as more businesses and employers begin to require workers to report back to the workplace through both traditional and hybrid work arrangements.

This analysis is further broken out between the City of Kelowna (Figure 7) and the rest of the region (Figure 8) on the following two pages to demonstrate the unique dynamics Kelowna faces in terms of employment land as the central city.

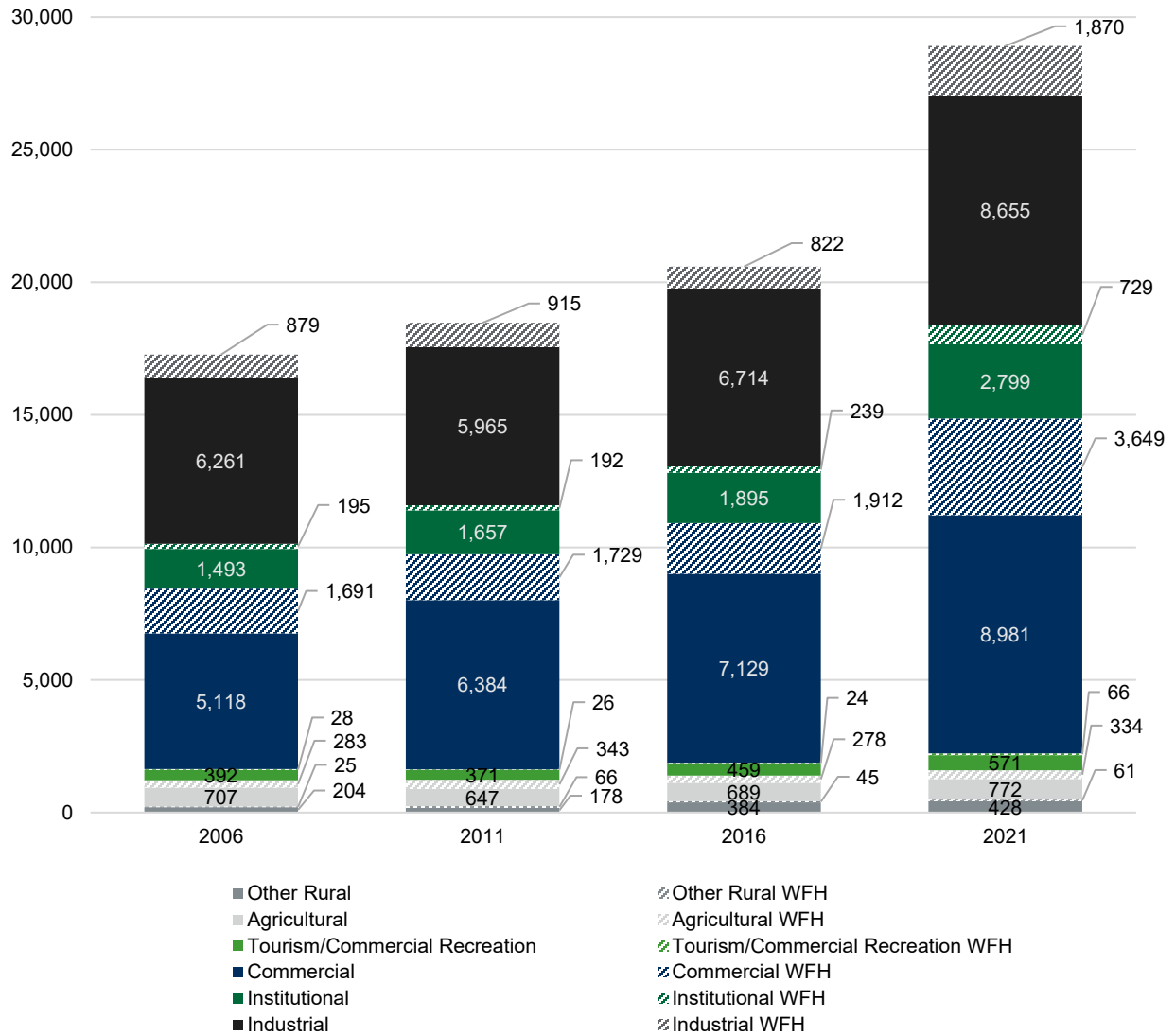
- While both Kelowna and the rest of the region saw net growth in employment, jobs tied to urban employment land remained flat or declined between 2016 and 2021 in the City of Kelowna but increased in the rest of the Central Okanagan. This is largely driven by the higher concentration of office-based employment in Kelowna's Commercial lands, which were more likely to make the shift towards remote and hybrid work arrangements.
- As more businesses gradually recall employees to the workplace, Kelowna is likely to see a rebalancing between Work From Home and jobs reporting to employment lands, particularly in the case of Commercial employment, supplemented by the deliveries of new employment spaces.

Figure 7. Employment Change by ELAC and Place of Work, City of Kelowna, 2006, 2011, 2016 & 2021



Source: B&A Studios, using data from Statistics Canada

Figure 8. Employment Change by ELAC and Place of Work, Central Okanagan excluding Kelowna, 2006, 2011, 2016 & 2021



Source: B&A Studios, using data from Statistics Canada

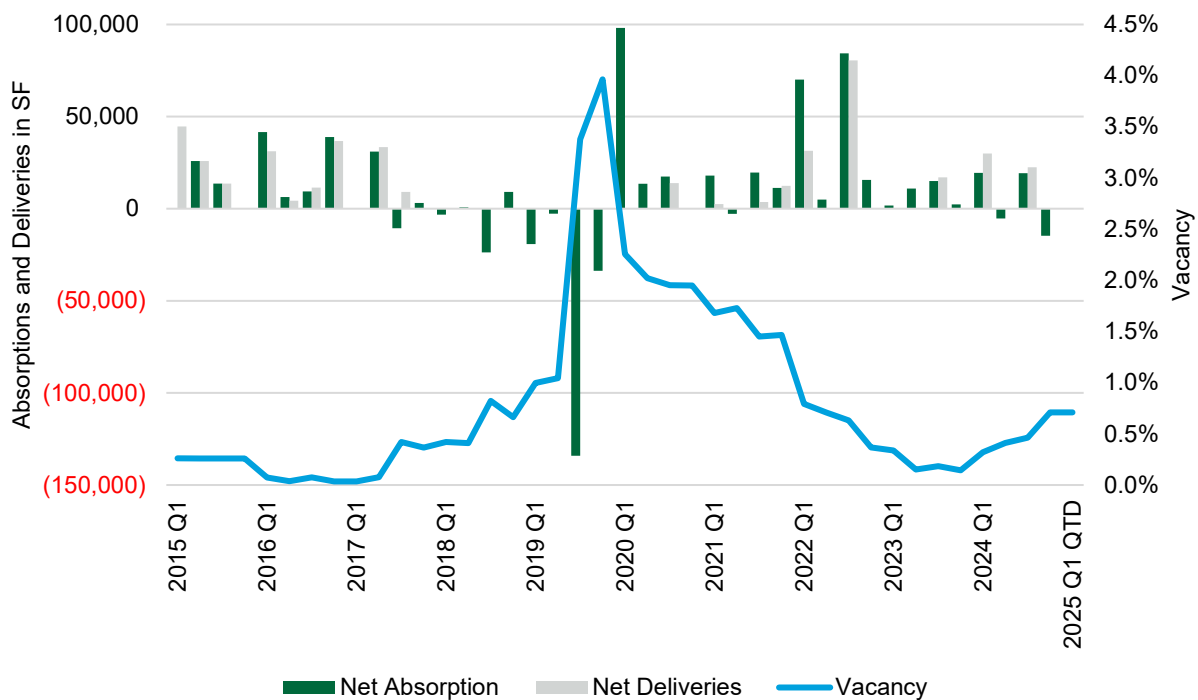
Market Absorption Trends

To supplement the analysis of employment and land dynamics, a review of local brokerage data was conducted utilizing market inventory data tracked by CoStar¹⁵. This analysis considered a range of available vacancy and space delivery data within the Central Okanagan office, retail and industrial markets to understand how land and space is being used in relation to economic conditions and employment growth demand.

COMMERCIAL - Retail

The Central Okanagan Commercial Retail market features nearly 6 million square feet of supply, which currently sits at a vacancy rate of 0.7%.

Figure 9. Net Absorption, Deliveries & Vacancy, Retail, Central Okanagan Region



Source: CoStar

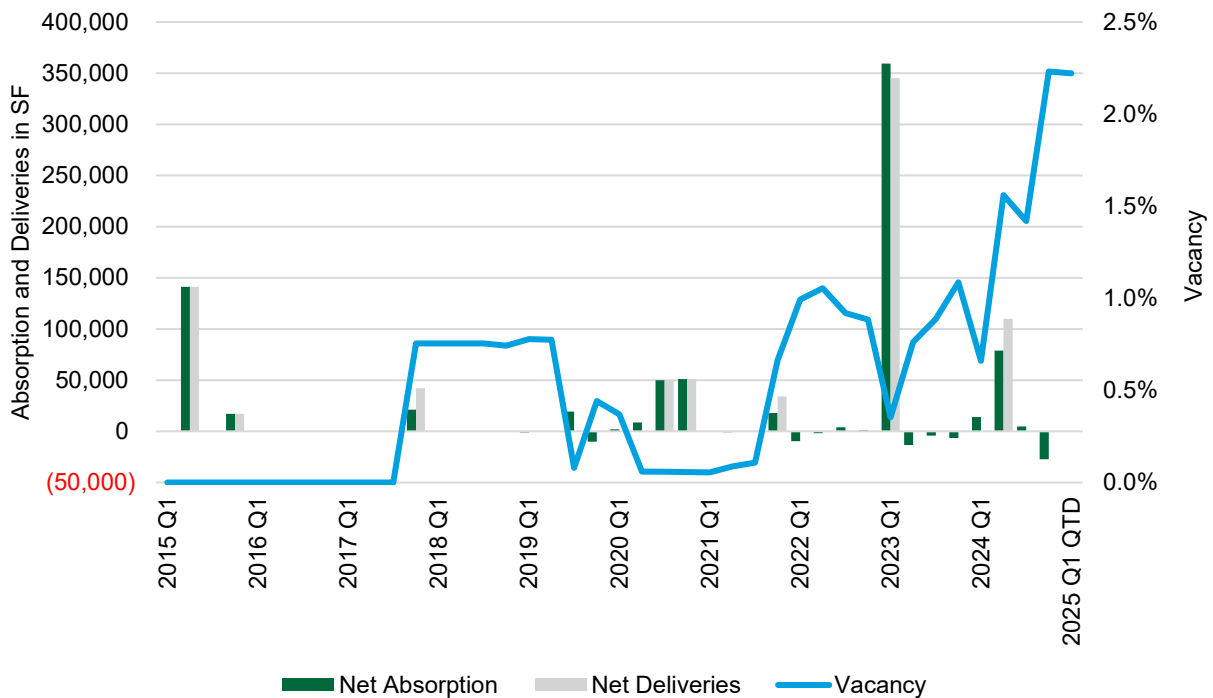
¹⁵ CoStar is a comprehensive real estate brokerage platform providing commercial property data used to evaluate market assessment of recent land transactions, development activity and space utilization through indicators including vacancy, absorption and rental rates for Commercial Retail, Industrial, Office and other employment spaces.

Barring the disruption caused by the COVID-19 pandemic, which the market has since recovered from, Commercial Retail vacancies have historically remained below 1.0% in the Central Okanagan over the past decade. This is despite the delivery of new supply over this timeframe. While recent economic headwinds and a period of higher interest rates have resulted in a slight uptick in vacancies, the market remains remarkably tight, suggesting demand for additional retail space will continue to grow with the regional population.

COMMERCIAL - Office

The Commercial Office inventory in the Region totals approximately 3.4 million square feet with a vacancy rate of 2.2%.

Figure 10. Net Absorption, Deliveries and Vacancy, Office, Central Okanagan Region



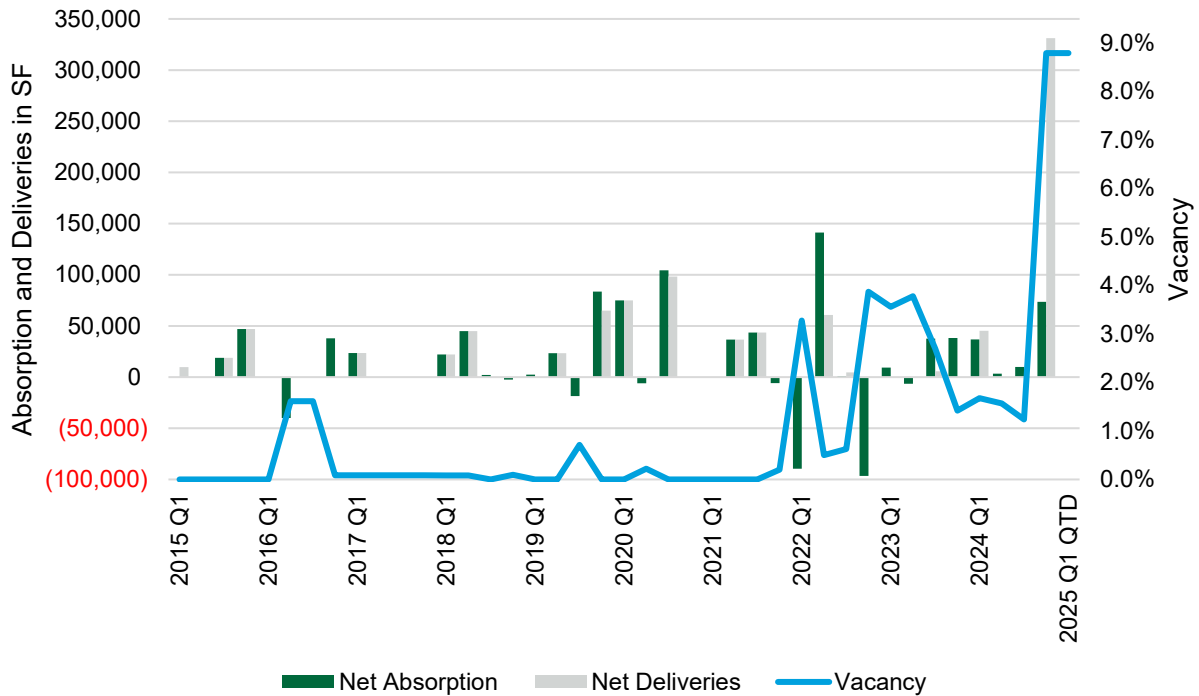
Source: CoStar

The Commercial Office inventory in the region has grown considerably since 2020, with several new deliveries accommodating a growing contingent of office workers in high-skill employment sectors. The market also managed to avoid considerable spikes in vacancy throughout the pandemic as the regional vacancy rate remained below 1.0% up until recently, where it has reached a recent high of 2.2% as new deliveries have come to market. Despite these recent increases, the market remains relatively tight when compared to other communities across British Columbia, with limited capacity to absorb new growth without additional new supply coming online.

INDUSTRIAL

The region is home to 3.4 million square feet of industrial space, with a vacancy rate that only recently spiked to 8.8% on account of several new projects coming online in short succession.

Figure 11. Net Absorption, Deliveries and Vacancy, Industrial, Central Okanagan Region



Source: CoStar

The Industrial supply in the Region has experienced low vacancy rates of less than 3.0% for much of the past decade, often facing periods of sub-1.0% availability. Vacancy rates have only climbed recently on account of the recent delivery of more than 330,000 square feet added in the fourth quarter of 2024, most of which was located along Pier Mac Way and Highway 97, across from the Kelowna International Airport.

While these recent projects have added noteworthy capacity to the region’s Industrial market in the near term, historic absorption rates and continued spillover demand from the Metro Vancouver market, which is facing its own land and supply constraints, suggest it won’t be long before additional space is required.

4. PROJECTED GROWTH AND EMPLOYMENT LAND DEMAND

Coupled with the review of employment land utilization, the RELI incorporates the findings from recent projections of population and employment growth to develop detailed outlooks for future employment land need. This section summarizes the key findings from each of the inputs, and how they inform the projected demand for employment land to 2046.

Regional Population Projections

The outlook for regional growth to 2046 starts with a set of population projection scenarios developed by Rennie. These scenarios consider a range of possible futures based on the demographic context anticipated for Canada over the coming years while also respecting local demographic trends at the local level. This includes data from the current (2021) and historical Census relating to births, deaths, intra-provincial, inter-provincial, and international migration at the regional and local levels.

Using a cohort survival methodology, a custom demographic projection model was developed for the region that accounts for the processes of aging, births, deaths, international migration, and inter- and intra-provincial migration. Each of these variables was modeled independently on an annual basis by single years of age and sex. Scenario parameters were determined through a workshop with RDCO and City of Kelowna staff.

According to the scenarios modelled, the total population of the region is projected to grow from 246,800 residents in 2023 to approximately 297,000 to 373,000 residents by 2046. Table 7 and Figure 12 on the following page summarize key figures from each scenario.

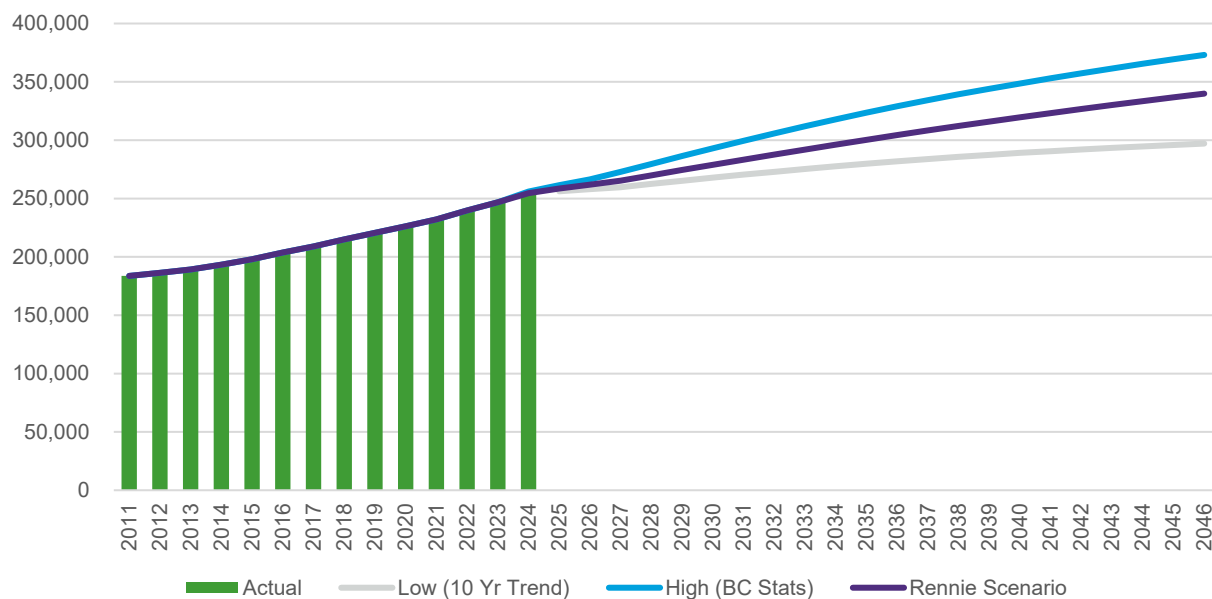
Table 7. Regional Population Projection Summary

Scenario	2023 Population	2046 Population	Net Growth	2046 Working Aged Population	Share of Working Population
Low (10-Year Trend)	246,800	297,100	50,300	193,980	65.3%
Medium (Rennie Scenario)	246,790	339,890	93,100	224,880	66.2%
High (BC Stats) ¹⁶	246,789	373,059	126,270	245,309	65.8%

Source: Statistics Canada – Annual Demographic Statistics & Rennie Population Models – BC Stats

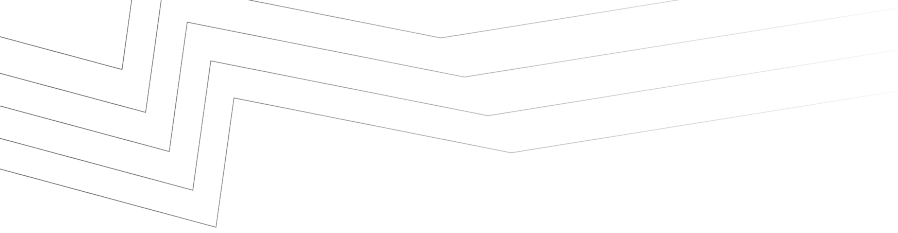
In developing future scenario parameters for each migration component, it was determined that several migration scenarios would be developed. The low migration scenario is based on the past 10 years and assumes a continuation of recent migration rates to the region. The medium-growth scenario using the Rennie model, considers migration levels against the Region’s future population growth, linking models for Canada and BC that were developed by Rennie. A third scenario, based on projections prepared by BC Stats, represents a high bookend for growth that would require even greater levels of in-migration to the region.

Figure 12. Total Population and Population Projection, Central Okanagan Region, 2011-2046



Source: Statistics Canada – Annual Demographic Statistics & Rennie Population Models – BC Stats

¹⁶ The Province of British Columbia requires municipalities to refer to BC Stats Projections for their Housing Needs Report and Official Community Plans.



These population projections are key inputs used to inform the following employment projections, as population drives demand for a range of population-serving industries, including retail, personal services, construction, and local government. It is also necessary to consider the projected size of the regional labour force when preparing long-term employment projections to ensure that projected employment does not exceed the supply of regional workers to fill those jobs.

Unlike many other communities across Canada, which are experiencing a gradual decline in their working aged population (15-64 years old), the Central Okanagan is largely expected to maintain the ratio of working aged residents (approximately 65%) throughout the projection window, largely on account of the migration patterns of young people to the region.

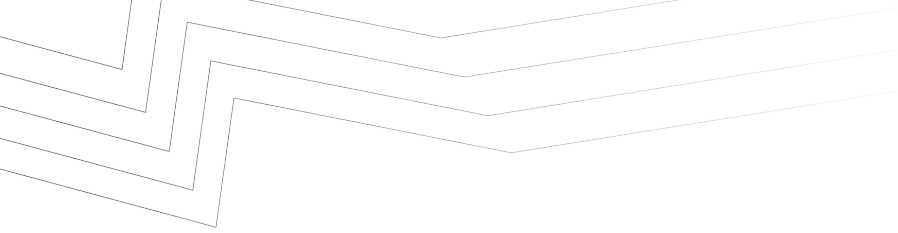
Regional Employment Projections

Building on the population outlook developed by Rennie, accompanying employment projections to 2046 were prepared by Deloitte. The employment projections start from a 2023 baseline, informed by historic and trend analysis to develop three employment projection scenarios demonstrating possible future trajectories for regional employment to the year 2046. Like the RELI analysis, this outlook considers place of work trends and geographic allocation of employment across different economic sectors to provide a detailed estimate of job growth that aligns with the various land use categories.

To ensure congruency between the employment projections with the RELI land demand analysis, B&A Studios collaborated with Deloitte through the development of the RELI project to ensure alignment between definitions and assumptions, including how employment is attributed to different ELAC classes and how Work From Home trends are likely to stabilize in the years following the 2021 Census.

Projection Model

Projected employment for the Central Okanagan is measured within the boundaries of the region for the period from 2023 to 2046 for major industry sectors. Projections are calculated for 42 industries (based largely on 3-digit NAICS codes) and then aggregated to 18 sectors for reporting purposes. For the purpose of this report, employment projections by industry are further allocated to the six ELAC for detailed analysis of employment land demand to align with the overall RELI.



To project future employment, a conceptual model of how different regional industries relate to each other and to the local population was used to establish three overarching categories for the 42 industries:

- **Population-serving** – serves primarily the local population (and sometimes subsets of the population, such as children or the elderly).
- **Traded** – serves primarily markets outside the region, exporting industries or economic base industries.
- **Business support** – serves primarily other local industries.

Certain industries were split to represent instances where they serve both the local population and local businesses, or because they have a substantial exporting component in addition to serving the region.

Employment Baseline and Labour Force Projection

Due to the heavy reliance on 2021 Census employment data for projections using the baseline year of 2023, several steps were taken to adjust for the impact of COVID-19 on the Census employment data. This includes the significant number of jobs counted based on their temporary home-based location rather than their regular place of work.

Based on the assumption of permanently higher rates of home-based employment in the post-COVID era, work from home (WFH) rates in each industry were reduced from their 2021 level to a point 50% higher than their 2016 level. In effect, this lowers the baseline WFH rate from approximately 20% of all jobs within the region, down to just over 13%. This assumption reflects the greater ease of continuing to work from home in certain industries that already had higher WFH rates compared to more physical or customer service-oriented occupations and is assumed to remain relatively steady over the course of the projection period through to 2046.

Several indicators of regional employment change from 2021 to 2023 were also considered, including the Labour Force Survey, estimated employment by industry based on changes in business counts from Statistics Canada's Business Register, and employment estimates from Lightcast (formerly EMSI), which incorporates a variety of data inputs into its bi-annual employment estimates.¹⁷

¹⁷ For additional information on the share splits and assumptions incorporated into the employment projections, please refer to the Regional Employment Projections: 2021-2046, December 2024 report.

Projected Total Employment Growth

Starting from an estimated total employment count of 120,070 in 2023, the three employment projection scenarios show the Central Okanagan growing to the following by 2046:

- **Low Employment Scenario**¹⁸ – 164,340 total jobs (change of 44,270 – average growth rate of 1.4%)
- **Medium Employment Scenario** – 173,575 total jobs (change of 53,505 – average growth rate of 1.6%)
- **High Employment Scenario** – 187,000 total jobs (change of 66,930 – average growth rate of 1.9%)

A detailed summary of the Medium growth scenario, broken out by Deloitte's 18 aggregate sectors, is provided in Table 8.¹⁹

Table 8. Regional Employment Projections by Summary Industries, Medium Scenario

Summary Industry	ESTIMATED 2023 JOBS	PROJECTED 2046 JOBS	EMPLOYMENT CHANGE	AVERAGE GROWTH RATE
Agriculture	2,025	2,040	15	0.0%
Forestry and logging	230	275	45	0.8%
Mining/Oil & gas	1,070	1,150	80	0.3%
Utilities	590	845	255	1.6%
Construction	13,410	19,245	5,835	1.6%
Manufacturing	5,635	8,265	2,630	1.7%
Wholesale trade	3,360	5,025	1,665	1.8%
Retail trade	15,240	10,975	5,735	1.4%
Transportation & warehousing	4,390	6,150	1,760	1.5%
Finance, insurance & real estate	6,925	9,935	3,010	1.6%
Professional, scientific & tech. services	10,565	16,020	5,455	1.8%
Business, building & support services	5,525	8,260	2,735	1.8%
Health care & social assistance	18,210	31,475	13,265	2.4%
Education	8,535	10,170	1,635	0.8%
Information, culture & recreation	4,975	6,690	1,715	1.3%
Accommodation & food services	9,680	13,720	4,040	1.5%
Repair, personal & non-profit services	5,025	6,915	1,890	1.4%
Public administration	4,680	6,425	1,745	1.4%
TOTAL REGIONAL EMPLOYMENT	120,070	173,575	53,505	1.6%

Source: Deloitte, based on Rennie population projections

Note: Numbers may not sum due to rounding.

¹⁸ Deloitte's Low Employment Scenario is based on the 5-year migration trend scenario prepared Rennie.

¹⁹ Figures shown here are for the Central Okanagan. For detailed projections by each member jurisdiction and First Nation, please refer to the Regional Employment Projections: 2021-2046 report.



Allocation of Growth to Sub-Regional Jurisdictions

Regional employment growth rates were applied to each jurisdiction within Central Okanagan, with an alternative approach used for certain industries that serve local population, in which case local population growth becomes the key driver (or is blended with regional growth). For example, employment in primary and secondary education is driven by the school-age population in each community. In other cases, where employment is primarily connected to a single regional asset, the regional growth is allocated based on the location of the regional asset. For example, air transportation employment is allocated to Kelowna for Kelowna International Airport.

For regional jobs that have no fixed place of work, they are allocated to separate jurisdictions in proportion to the communities' share of regional "fixed-place" employment. For example, if West Kelowna has 25% of jobs with a fixed place of work in a given industry, West Kelowna is assigned 25% of the regional total of "non-fixed place" jobs in that industry, regardless of where those workers live in the region.

Allocation of Employment Projections to ELAC

With the employment projections by sector established, Deloitte and B&A held several workshops to determine how to allocate growth between different land use categories. These workshops involved a detailed review of employment activity to the 4-digit NAICS code, and in some cases even deeper, to align the employment projections with appropriate ELAC categories. The allocation process also accounts for the current supply of employment land by type in each jurisdiction, including allocating jobs to alternative categories at the local level should an ELAC category not be present in their current land use policies. A detailed summary of allocation assumptions by 3-digit NAICS code is provided in **Appendix C**.

Table 9 on the following page summarizes the three projected employment scenarios across the region by ELAC.

Table 9. Employment Projections by ELAC, 2023-2046, Central Okanagan Region

Central Okanagan Region – Low Employment Projection Scenario				
Employment Land Analysis Class	2023 Estimated Jobs	2046 Projected Jobs	Total Change (2023-2046)	Average Growth (2023-2046)
Commercial	47,525	64,635	17,110	1.3%
Industrial	33,050	44,185	11,135	1.3%
Institutional	18,765	27,225	8,460	1.3%
Agricultural	3,390	4,155	765	0.9%
TCR	1,020	1,395	375	1.4%
Other Rural	505	600	95	0.8%
Home-based	15,815	22,140	6,325	1.5%
Central Okanagan Region – Medium Employment Projection Scenario				
Employment Land Analysis Class	2023 Estimated Jobs	2046 Projected Jobs	Total Change (2023-2046)	Average Growth (2023-2046)
Commercial	47,525	68,875	21,350	1.6%
Industrial	33,050	46,750	13,700	1.5%
Institutional	18,765	28,710	9,945	1.9%
Agricultural	3,390	4,160	770	0.9%
TCR	1,020	1,380	360	1.3%
Other Rural	505	610	105	0.8%
Home-based	15,815	23,100	7,285	1.7%
Central Okanagan Region – High Employment Projection Scenario				
Employment Land Analysis Class	2023 Estimated Jobs	2046 Projected Jobs	Total Change (2023-2046)	Average Growth (2023-2046)
Commercial	47,525	74,100	26,575	1.9%
Industrial	33,050	50,215	17,165	1.8%
Institutional	18,765	31,765	13,000	2.3%
Agricultural	3,390	4,160	770	0.9%
TCR	1,020	1,475	455	1.6%
Other Rural	505	645	140	1.1%
Home-based	15,815	24,640	8,825	1.9%

Source: Deloitte



Employment Land Demand Projections

At its core, the projected demand for employment land is a function of two inputs for each ELAC:

- **Net Change in Jobs** – How many more jobs are expected by 2046?
- **Average Land Use Density** – How many jobs can be accommodated per net hectare?

With the Net Change in Jobs provided by Deloitte’s employment projections, the Average Land Use Density is extrapolated from the Employment Land Inventory.

Employment Density Assumptions

Building on historical employment and market trends summarized in Chapter 3, an employment density analysis was conducted which compares total jobs in each ELAC class to the supply of occupied land. The analysis considers only land that is both classified as occupied and where the zoning matches the ELAC, indicating the land is being utilized by its intended economic function and netting out non-conforming uses that might otherwise skew the resulting figures.

Why Do The Projections Start From 2023?

Given occupancy status is based on 2024 BC Assessment data, which itself reflects property status and value as of July 1st, 2023, the density analysis utilizes the 2023 baseline employment projections provided by Deloitte to better ensure alignment between the timing of the employment estimate and when the land status was established. The 2023 projections also have the benefit of reflecting the adjusted Work From Home assumptions, which seek to offset the pandemic related discrepancy in Place of Work status observed in the 2021 Census due to when it was conducted.

The employment density analysis for the Central Okanagan is summarized in Table 10 on the following page.

Table 10. Average Employment Density Analysis, 2023

Central Okanagan Region				
ELAC	2023 Employment	Occupied & Zoned Land (ha)	Employment per Hectare	
Commercial	47,525	642.8	73.9	
Industrial	33,050	1,044.9	31.6	
Institutional	18,765	488.4	38.4	
Agricultural	3,390	13,189.7	0.3	
TCR	1,020	113.7	9.0	
Other Rural	505	457.7	1.1	
City of Kelowna				
ELAC	2023 Employment	Occupied & Zoned Land (ha)	Employment per Hectare	
Commercial	37,800	487.6	77.5	
Industrial	26,000	874.4	29.7	
Institutional	15,740	325.3	48.4	
Agricultural	2,340	5,647.9	0.4	
TCR	-	-	-	
Other Rural	-	-	-	
Rest of Central Okanagan (excl. Kelowna)				
ELAC	2023 Employment	Occupied & Zoned Land (ha)	Employment per Hectare	
Commercial	9,725	155.2	62.7	
Industrial	7,050	170.5	41.3	
Institutional	3,025	163.1	18.5	
Agricultural	1,050	7,541.8	0.1	
TCR	1,020	113.7	9.0	
Other Rural	505	457.7	1.1	

Source: B&A Studios, using data from Deloitte, RDCO and BC Assessment

The employment density analysis is further broken out between the City of Kelowna and the Rest of the Central Okanagan region to demonstrate the distinction in employment densities between the central city and the rest of the region. Except for Industrial employment densities, which are notably suppressed due to the presence of the Kelowna International Airport and Glenmore Landfill, the average employment density for each ELAC is notably higher in the City of Kelowna.

While employment densities also vary amongst the other jurisdictions across the region, largely as a function of smaller land inventories and local employment counts, the general trend results in lower densities than those found in the central city. For this reason, the densities for the City of Kelowna and the Rest of the Central Okanagan are applied as the baseline for developing the average land need assumption for demand projections for their respective geographies.

These baseline density figures were then increased by an average of 20% for all categories, apart from Industrial which was balanced at just over 45 jobs per net hectare regionally²⁰. These adjustments reflect the changing trend towards increased densities amongst new developments, particularly in areas where the available land supply faces constraints, as is demonstrated in the following chapter.

Projected Land Demand

The adjusted employment density assumptions are then applied to the net employment change for each of the scenarios, resulting in the following projected demand for employment land.

Table 11. Projected Land Demand, 2023 to 2046, Low, Medium & High Scenarios

Projected Land Demand by ELAC, Central Okanagan Region							
Analysis Class	Assumed Density (jobs/ha)*	Low Scenario		Medium Scenario		High Scenario	
		Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)
Commercial	88.0	17,110	194.5	21,350	242.2	26,575	299.9
Industrial	45.5	11,135	244.8	13,700	301.1	17,165	377.5
Institutional	44.3	8,460	191.1	9,945	222.3	13,000	281.1
Agricultural	0.3	765	2,741.0	770	2,741.0	770	2,741.0
TCR	10.8	335	34.8	320	33.4	400	42.3
Other Rural	1.3	95	71.7	105	79.3	140	105.7
Total		37,900	3,478.0	46,190	3,619.4	58,050	3,847.5
Projected Land Demand by ELAC, City of Kelowna							
Analysis Class	Assumed Density (jobs/ha)	Low Scenario		Medium Scenario		High Scenario	
		Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)
Commercial	93.0	12,950	139.2	16,360	175.9	21,035	226.1
Industrial	45.5	8,690	191.1	10,720	235.7	13,715	301.6
Institutional	58.1	6,830	117.6	8,105	139.6	10,950	188.6
Agricultural	0.5	470	945.3	470	945.3	470	945.3
TCR	-	-	-	-	-	-	-
Other Rural	-	-	-	-	-	-	-
Total		28,940	1,393.3	35,655	1,496.5	46,170	1,661.6

²⁰ This assumption increases the Industrial density for the rest of the region, which is already quite high, by only 10%. The City of Kelowna is increased to match in order to offset the comparatively lower 2023 densities skewed by the presence of the airport and the regional landfill.

Table 11. Projected Land Demand, 2023 to 2046, Low, Medium & High Scenarios (Continued)

Projected Land Demand by ELAC, Rest of Central Okanagan (Excluding Kelowna)							
Analysis Class	Assumed Density (jobs/ha)	Low Scenario		Medium Scenario		High Scenario	
		Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)
Commercial	75.2	4,160	55.3	4,990	66.4	5,540	73.7
Industrial	45.5	2,445	53.8	2,980	65.4	3,450	76.0
Institutional	22.3	1,630	73.5	1,840	82.7	2,050	92.6
Agricultural	0.2	295	1,795.7	300	1,795.7	300	1,795.7
TCR	10.8	335	34.8	320	33.4	400	42.3
Other Rural	1.3	95	71.7	105	79.3	140	105.7
Total		8,960	2,084.8	10,535	2,122.8	11,880	2,185.9

Source: B&A Studios, using data from Deloitte, RDCO and BC Assessment

Note: (*) The weighted regional average for Assumed Job Density varies by projection scenario depending on how jobs in each ELAC are allocated in each respective scenario.

Key takeaways from these projections are as follows:

URBAN

- **Commercial:** Between approximately 195 ha and 300 ha of Commercial land will be required to accommodate the projected employment growth between 2023 and 2046. As much as 75% of this demand is expected to be directed towards the City of Kelowna based on the geographic allocation of jobs.
- **Industrial:** Demand for Industrial land is projected between approximately 245 ha on the low end and 377 ha on the high end between 2023 and 2046. Close to 80% of this demand is projected to originate in the City of Kelowna.
- **Institutional:** Institutional land demand ranges from approximately 191 ha to as much as 281 ha. Roughly two-thirds of the regional demand is attributed to the City of Kelowna, varying between scenarios more closely with the allocation of population between communities.



RURAL

- **Agricultural:** There is very little deviation in the anticipated Agricultural employment growth between each of the three scenarios, resulting in projected demand for over 2,700 ha of additional land. This projected amount of land need assumes Agricultural land use will follow historical ratios, which are comparatively quite low. However, throughout the local context study, there was considerable discussion about the potential for intensified Agricultural opportunities, including increasing consideration for on-farm processing facilities and vertical farming. If more of these types of intensified Agricultural are accommodated for on designated ALR lands over time, the projected number of Agricultural jobs could potentially be accommodated on significantly less land.
- **Tourism / Commercial Recreation:** It is projected that between 35 ha and 42 ha of additional land need is projected for TCR uses. It is worth noting that projected land need is lower in the Medium growth scenario than it is in the Low scenario based on the allocation of employment according to Deloitte's projections, though the implications are not considered significant.
- **Other Rural:** Projected demand falls approximately between 72 ha and 106 ha.

It should also be noted that the projected demand for employment land by ELAC can vary between scenarios because of the assumptions for how projected population and job growth have been allocated. For example, Institutional growth pressure is higher in Westbank First Nation (IR#9 and IR#10) under the Medium growth scenario than it is under the High growth scenario. For this reason, employment land demand in the gap analysis that follows is presented in terms of Lowest and Highest overall demand for each ELAC in terms of relative demand as bookends for planning purposes, rather than with regards to specific scenarios. For additional details, please refer to the local land demand figures included in **Appendix A**.

5. EMPLOYMENT LAND GAP ANALYSIS

Comparing the assessment of the Regional Employment Land Inventory against the projected demand for land by 2046 provides insight into the need for different types of future employment land, where it might be accommodated, and where shortfalls could occur.

Considered together, the projections of employment land need and the detailed assessment of the Regional Employment Lands Inventory enable the measurement of both demand and supply factors culminating in a regional gap analysis. This analysis identifies areas of potential surplus or deficit between the demand for land and the capacity to accommodate it within ELACs at the regional and local level.

Some key things to keep in mind when reviewing the gap analysis:

- Land demand is calculated at the local and regional level. If there is not enough supply in a local area, it may be accommodated in other parts of the region, or potentially in a different ELAC depending on the business and the nature of the use.
- Some businesses are more flexible than others when it comes to location choices, while others have very specific needs. These can include access to customers, infrastructure, complementary business linkages, or specific site or building needs, to name a few.
- Vacant shovel ready sites in prime locations are the most likely to be absorbed first. As supply tightens, market competition may make constrained sites more viable.
- Some growth may be accommodated by the redevelopment of soft-sites or non-conforming uses (most likely by Commercial uses) before considering greenfield developments or availability of land in other jurisdictions.
- Demand may 'spill over' to land in a neighbouring community as supply dwindles.
- Not all sites will develop due to constraints. The 'effective' supply will deplete before absolute supply reaches zero. Effective supply will vary by community.
- If businesses must go too far afield, growth may not materialize or may choose to relocate to other economic regions.
- The gap analysis assumes no net loss of existing employment lands to non-employment uses. If such conversions are permitted, the net demand for land will rise accordingly.

The gap analysis summary tables include the following factors for each ELAC:

- **Vacant Supply** – The amount of designated employment land identified to be vacant according to BC Assessment data. Does not include consideration of site constraints.
- **Lowest Demand** – The lowest projected net demand for land by the year 2046 (in hectares) for employment land based in the ELAC category out of all provided scenarios.
- **Lowest Surplus / (Deficit)** – The net calculation of subtracting the Lowest Demand figure from the Vacant Supply for the ELAC category.
- **Highest Demand** – The highest projected net demand for land by the year 2046 (in hectares) for employment land based in the ELAC category out of all provided scenarios.
- **Highest Surplus / (Deficit)** – The net calculation of subtracting the Highest Demand figure from the Vacant Supply for the ELAC category.

It should be noted here that the Surplus / (Deficit) calculations shown in the following tables do not factor in site constraints, nor do they consider the additional potential that could be unlocked via the redevelopment of underutilized occupied sites.

Regional Gap Analysis

Table 12 summarizes the gap analysis for each ELAC at a cumulative region-wide level.

A Note When Reviewing the Gap Analysis Summary:

The total supply of vacant land does not provide the full picture as it relates to the employment capacity of the Central Okanagan. Many of these lands feature constraints, including limited access to public infrastructure, challenging topography, environmental restrictions, soil conditions, and other factors that may limit the potential to accommodate economic activity.

Table 12. Projected Land Demand and Supply, 2023-2046, Central Okanagan Region

Central Okanagan Region Projected Land Demand and Supply Gap, 2023-46 (ha)					
ELAC	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
Commercial	159.0	194.5	(35.5)	299.9	(140.9)
Industrial	597.1	244.8	352.3	377.5	219.6
Institutional	65.6	191.1	(125.4)	281.1	(215.5)
Agricultural	17,319.5	2,741.0	14,578.5	2,741.0	14,578.5
TCR	3,027.8	34.8	2,993.0	42.3	2,985.6
Other Rural	15,441.8	71.7	15,370.1	105.7	15,336.1

Source: B&A Studios, using data from Deloitte, RDCO and BC Assessment

At a high level, the supply of vacant rural employment land appears to be sufficient to meet regional demand, while urban employment land is far more constrained. However, there is considerable nuance to be considered within these figures, as discussed in the following section.

Gap Analysis by ELAC

A deeper dive into the gap analysis by ELAC demonstrates where pinch points may occur at the local level within the region.

Commercial Land

Table 13. Commercial – Projected Land Demand and Supply Gap

Commercial – Projected Land Demand and Supply Gap (ha)					
Jurisdiction	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
IR #7 – OKIB	0.0	0.2	(0.2)	0.5	(0.5)
IR #9 – WFN	6.0	16.2	(10.2)	22.6	(16.6)
IR #10 – WFN	23.5	3.5	19.9	18.2	5.3
Kelowna	59.7	139.2	(79.5)	226.1	(166.5)
Lake Country	17.9	9.7	8.2	14.4	3.4
Peachland	9.3	2.2	7.1	2.9	6.3
RDCO East	1.6	0.7	0.8	1.1	0.4
RDCO West	0.3	0.1	0.3	0.1	0.3
West Kelowna	40.9	19.1	21.7	24.3	16.5
Total*	159.0	194.5	(35.5)	299.9	(140.9)

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

Note: (*) Local Demand and Surplus / (Deficit) figures may not sum to Regional Total as the local demand for certain ELACs varies with population distribution between scenarios. Figures shown represent the lowest and highest for each geography to serve as illustrative bookmarks for local planning purposes but may not necessarily represent the same regional scenario.

Beginning with Commercial employment lands, the region faces an annual average demand between approximately 8 ha and 13 ha per year, for a total of between 195 ha to just shy of 300 ha. With a total of 159 ha of vacant land, this equates to between 12 to 19 years of supply.

Between 71% to 75% of this demand is projected to be generated in the City of Kelowna, though this is considerably greater than Kelowna's supply of vacant Commercial land. Barring the designation of additional Commercial designated land, much of this growth will need to be accommodated via the redevelopment of occupied Kelowna's underutilized lands (estimated at 145 ha) at higher employment densities than exist today.



Accommodating Commercial Demand via Infill Redevelopment:

Commercial employment is well suited for mixed-use redevelopments at higher densities, including office and hotel functions, which can unlock some opportunity through infill redevelopment. However, all local jurisdictions will need to take care to not incur a net loss of employment space as Commercial sites are redeveloped, as this can often be the case without proper policy guardrails in place.

Even in more conservative scenarios, the projected demand for Commercial space in Kelowna could exceed the combined capacity of existing vacant lands and underutilized occupied sites, resulting in potential spillovers to other land uses and neighbouring communities. Given the more flexible nature of Commercial jobs, some may locate in other ELAC land use categories, creating competition with other employment uses.

It is also worth noting that there is a fair degree of variability in terms of demand for different types of Commercial space (i.e. office, local serving retail, regional retail centres, etc.) and what can be accommodated in different types of spaces (e.g. office buildings, small storefronts, large format grocery stores, etc.), though this is beyond the scope of this study.

Outside of Kelowna, most communities are projected to have a modest surplus of vacant Commercial land after accounting for local demand. These lands could also potentially absorb some of the regional pressure currently allocated to Kelowna, though the population-serving nature of many Commercial businesses means this potential is somewhat limited. Servicing is also noted as a constraint for some of these lands, specifically in Lake Country and Peachland.

Industrial Land

Table 14. Industrial – Projected Land Demand and Supply Gap

Industrial – Projected Land Demand and Supply Gap (ha)					
Jurisdiction	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
IR #7 – OKIB	0.0	2.9	(2.9)	4.8	(4.8)
IR #9 – WFN	5.9	7.5	(1.6)	10.4	(4.5)
IR #10 – WFN	5.4	2.2	3.2	11.1	(5.7)
Kelowna	521.8	191.1	330.8	301.6	220.3
Lake Country	44.3	8.7	35.6	12.1	32.2
Peachland	2.1	1.4	0.6	2.1	(0.0)
RDCO East	0.0	0.0	0.0	0.0	0.0
RDCO West	0.0	1.0	(1.0)	1.5	(1.5)
West Kelowna	17.6	30.0	(12.4)	40.8	(23.1)
Total*	597.1	244.8	352.3	377.5	219.6

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

Note: (*) Local Demand and Surplus / (Deficit) figures may not sum to Regional Total as the local demand for certain ELACs varies with population distribution between scenarios. Figures shown represent the lowest and highest for each geography to serve as illustrative bookmarks for local planning purposes but may not necessarily represent the same regional scenario.

The projected demand for Industrial ranges from approximately 245 ha to 378 ha, equivalent to an average of approximately 11 ha to 16 ha of absorption per year. With 597 ha of vacant industrial supply across the region, this equates to between 36 and 56 years of supply; however, this does not consider constraints. Just over 409 ha of Industrial land feature access to servicing, with only approximately 80 ha of vacant land considered not otherwise constrained by steep slopes or other environmental conditions that may limit development potential.

With approximately 522 ha of vacant Industrial land, the City of Kelowna is projected to accommodate the largest share of Industrial growth by 2046. However, this comes with the caveat that just two thirds (approx. 344 ha) of Kelowna’s vacant Industrial sites are currently serviced, and fewer still (approx. 60 ha) are not otherwise constrained by potential geographic or environmental constraints. Some of these vacant lands have also been set aside for civic uses, including the airport and landfill, that may limit their potential to accommodate some forms of Industrial employment. These limitations may hinder Kelowna’s ability to accommodate a significant portion of the projected growth.

Of the remaining Industrial demand for the region, only Lake Country appears to have a sufficient supply of vacant and serviced Industrial land to meet local projected demand. While Industrial demand for other parts of the region is modest, the supply of designated Industrial land that is both vacant and serviced could be a hindrance to economic opportunities tied to these lands at the local level.



Effective Supply and Frictional Absorption

While it is easy to think of demand as an average rate of absorption until there is nothing left, land development does not proceed in a linear fashion. Rather, it nearly always tails off because the remaining land is of limited viability. This means that there is demand that cannot be met by the available supply well before a point of build-out is reached.

The 'effective' supply in an inventory, representing the supply of sites that can viably be serviced and constructed under current market conditions, tends to be much lower than the total vacant supply. Take for example, the supply of vacant Industrial land in the Central Okanagan, which is projected to be more than enough to accommodate growth past 2046, with the total inventory to be absorbed sometime between 2059 and 2079. However, only 409.4 ha of the Industrial lands in the RELI inventory are located within 100m of existing infrastructure and even fewer still may be developable due to geographic or environmental constraints. These constraints may not limit all forms of development, but they will reduce the number of businesses and the types of employers that can use these lands.

In the absence of additional land to meet the needs of continued demand, the rate of land absorption will tail off until near full development is reached. This decline in absorption will not be due to a lack of interest but instead will be the result of businesses and jobs having relocated to markets that are more readily available to meet their needs. The combination of a constrained land supply and steady demand will put upward pressure on the price of land for both new and existing economic functions. This will be a limiting factor in many employment activities but will also force more intensive use of land where possible.

Institutional Land

Table 15. Institutional – Projected Land Demand and Supply Gap

Institutional – Projected Land Demand and Supply Gap (ha)					
Jurisdiction	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
IR #7 – OKIB	0.0	0.0	0.0	0.0	0.0
IR #9 – WFN	5.9	16.2	(10.3)	18.2	(12.3)
IR #10 – WFN	0.0	1.8	(1.8)	12.8	(12.8)
Kelowna	31.1	117.6	(86.5)	188.6	(157.5)
Lake Country	11.6	13.7	(2.1)	23.1	(11.5)
Peachland	4.4	0.4	4.0	1.1	3.3
RDCO East	0.1	(0.4)	0.5	0.4	(0.4)
RDCO West	0.0	0.0	0.0	0.2	(0.2)
West Kelowna	12.6	38.0	(25.4)	44.9	(32.3)
Total*	65.6	191.1	(125.4)	281.1	(215.5)

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

Note: (*) Local Demand and Surplus / (Deficit) figures may not sum to Regional Total as the local demand for certain ELACs varies with population distribution between scenarios. Figures shown represent the lowest and highest for each geography to serve as illustrative bookmarks for local planning purposes but may not necessarily represent the same regional scenario.

Projected demand for Institutional uses ranges from just over 191 ha to 281 ha by 2046, averaging out to approximately 8 ha to 12 ha per year. With less than 66 ha of vacant supply identified, the region could potentially absorb this supply in less than a decade, though the post-pandemic impacts to some institutional functions may mute some of that demand in the near term while government offices and schools continue to re-evaluate their space needs.

Apart from major regional Institutional infrastructure, such as regional hospitals and university campuses, the bulk of Institutional demand is expected to follow local population growth. As with the other urban lands, Kelowna is expected to see the bulk of the total demand, but a modest amount additional need is expected in most other communities where positive population growth is projected. Only Peachland currently shows a surplus of vacant Institutional land, while most other jurisdictions appear to be in a deficit. Some of this demand may be accommodated via the intensification of existing Institutional assets including the integration of various mixed-Institutional built forms, though it appears likely that additional Institutional lands will also be required through to 2046.

Agricultural Land

Table 16. Agricultural - Projected Land Demand and Supply Gap

Agricultural – Projected Land Demand and Supply Gap (ha)					
Jurisdiction	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
IR #7 – OKIB	0.0	0.0	0.0	0.0	0.0
IR #9 – WFN	0.0	0.0	0.0	0.0	0.0
IR #10 – WFN	0.0	0.0	0.0	0.0	0.0
Kelowna	3,034.1	945.3	2,088.8	945.3	2,088.8
Lake Country	5,465.7	628.5	4,837.3	628.5	4,837.3
Peachland	1.4	89.8	(88.4)	89.8	(88.4)
RDCO East	4,522.4	59.9	4,462.6	59.9	4,462.6
RDCO West	3,900.4	29.9	3,870.5	29.9	3,870.5
West Kelowna	395.4	987.6	(592.2)	987.6	(592.2)
Total*	17,319.5	2,741.0	14,578.5	2,741.0	14,578.5

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

Note: (*) Local Demand and Surplus / (Deficit) figures may not sum to Regional Total as the local demand for certain ELACs varies with population distribution between scenarios. Figures shown represent the lowest and highest for each geography to serve as illustrative bookmarks for local planning purposes but may not necessarily represent the same regional scenario.

Demand for Agricultural uses is projected at 2,741 ha by 2046, or approximately 119 ha per year on average based on current rates of employment to land. Demand does not vary materially between the different projection scenarios, though the allocation of growth may vary depending on what type of production these jobs focus on (e.g. production of specific crops, raising of livestock, agri-tourism, among others).

While there is a regional surplus of vacant Agricultural lands to accommodate demand to 2046, most are constrained by steep slopes that limit potential farming activities. The RELI also cannot speak to soil quality, which is a key consideration in Agricultural productivity. Given the economic importance of agricultural uses to the Central Okanagan, the region and its partners should be careful to protect viable agricultural lands over the long term.

There is a surplus of vacant Agricultural lands in Kelowna, Lake Country, and RDCO East and West. The land use plans for the Okanagan Indian Band (IR #7) and Westbank First Nation (IR #9 and IR #10) do not designate lands for Agricultural use, though some such activities do occur within their boundaries. Projected demand for agricultural employment in Peachland and West Kelowna is based on historic trends that will not be likely to continue at the same pace based on the limited supply of vacant farmland within their communities. Based on these constraints, these jobs would likely need to be accommodated through intensification of existing Agricultural activity or, as will more likely be the case, will otherwise occur elsewhere in the region.

Tourism / Commercial Recreation Land

Table 17. Tourism / Commercial Recreation - Projected Land Demand and Supply Gap

Tourism / Commercial Recreation – Projected Land Demand and Supply Gap (ha)					
Jurisdiction	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
IR #7 – OKIB	0.0	0.0	0.0	0.0	0.0
IR #9 – WFN	5.7	2.8	3.0	3.7	2.0
IR #10 – WFN	0.0	0.0	0.0	0.0	0.0
Kelowna	0.0	0.0	0.0	0.0	0.0
Lake Country	27.8	17.7	10.1	20.0	7.8
Peachland	33.3	0.9	32.4	1.4	31.9
RDCO East	49.6	1.9	47.7	2.8	46.8
RDCO West	2,911.4	2.3	2,909.1	4.2	2,907.2
West Kelowna	0.0	7.9	(7.9)	10.2	(10.2)
Total*	3,027.8	34.8	2,993.0	42.3	2,985.6

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

Note: (*) Local Demand and Surplus / (Deficit) figures may not sum to Regional Total as the local demand for certain ELACs varies with population distribution between scenarios. Figures shown represent the lowest and highest for each geography to serve as illustrative bookmarks for local planning purposes but may not necessarily represent the same regional scenario.

The demand for Tourism and Commercial Recreation lands is projected to add approximately 35 ha to 42 ha over the next 23 years. With over 3,000 ha of designated vacant land, the regional surplus for TCR lands appears quite large. Most of this supply is attributed to the Crystal Mountain area in RDCO West, of which potential resort expansion will likely only account for a small portion of the designated lands. Even still, there is a considerable amount of vacant TCR land available throughout the Central Okanagan. Only West Kelowna shows a TCR deficit, though some demand for TCR uses could also be accommodated via their Commercial lands.

Tourism is Important to the Central Okanagan, Why is TCR Land Demand Low?

It is important to distinguish that while the TCR category relates to jobs on lands specifically designated for resort or other tourism-related uses, it does not cover all tourism supporting employment lands. Uses in other ELAC groups like Commercial (e.g. highway-oriented hotels) and Agricultural (e.g. wineries) also play an important role in supporting tourism-related activities and jobs. Additionally, estimates for TCR land demand are based on the employment portion of existing resort communities (e.g. hotels and services) and excludes parcels occupied primarily for residential uses (e.g. resort condominium and cabins).

Other Rural Land

Table 18. Other Rural – Projected Land Demand and Supply Gap

Other Rural – Projected Land Demand and Supply Gap (ha)					
Jurisdiction	Vacant Supply	Lowest Scenario		Highest Scenario	
		Demand	Surplus / (Deficit)	Demand	Surplus / (Deficit)
IR #7 – OKIB	0.0	0.0	0.0	0.0	0.0
IR #9 – WFN	0.0	0.0	0.0	0.0	0.0
IR #10 – WFN	0.0	0.0	0.0	0.0	0.0
Kelowna	0.0	0.0	0.0	0.0	0.0
Lake Country	331.7	0.0	331.7	0.0	331.7
Peachland	113.3	0.0	113.3	0.0	113.3
RDCO East	5,153.6	52.9	5,100.8	86.8	5,066.8
RDCO West	3,877.0	0.0	3,877.0	0.0	3,877.0
West Kelowna	5,966.2	18.9	5,947.3	18.9	5,947.3
Total*	15,441.8	71.7	15,370.1	105.7	15,336.1

Source: B&A Studios, using data from Deloitte, RDCO, and BC Assessment

Note: (*) Local Demand and Surplus / (Deficit) figures may not sum to Regional Total as the local demand for certain ELACs varies with population distribution between scenarios. Figures shown represent the lowest and highest for each geography to serve as illustrative bookmarks for local planning purposes but may not necessarily represent the same regional scenario.

Limited growth amongst Other Rural employment sectors means that there is only a modest amount of demand projected for Other Rural lands by 2046, ranging from approximately 72 ha to 106 ha. The exact location of these activities will depend on which projects move forward but based on the data available for the RELI analysis, there does not appear to be a shortfall in the amount of land available to accommodate this employment. Should expansion of permanent growth boundaries be considered, these lands may warrant consideration for conversion to accommodate other economic activities facing land deficits.

6. SUMMARY OF FINDINGS AND IMPLICATIONS

The findings of the Regional Employment Lands Inventory & Gap Analysis indicate the supply of employment lands in the Central Okanagan will fall short of meeting projected future demand. Proactive planning is required to ensure the Central Okanagan can continue to support its economic objectives.

The Central Okanagan Faces a Shortage of Urban Employment Lands

Employment lands across a range of land uses serve a crucial role in accommodating a diverse and resilient economy. Regions that are more economically diverse tend to experience less instability and lower unemployment rates when compared to regions with more homogenous economies. Complex economies, that are those that feature a web of interconnected industries, business sectors, and services, also tend to be far more resilient, experiencing reduced economic decline during periods of recession, and faster recoveries.

In the same regard, failing to ensure a suitable supply of different types of employment land could limit growth and investment, and even weaken existing sectors that rely upon these links. Even with the changing nature of work and technological innovations resulting in evolving land and space needs, employment lands across commercial, industrial, institutional and rural uses will still be necessary to ensure regional economic diversity and resilience for the future.

The Regional Employment Land Inventory gap analysis indicates there are several areas where the projected rate of employment growth will be greater than the current land supply's capacity to accommodate. This is most prevalent amongst urban employment land uses, namely Commercial and Institutional lands. Most of this demand is focused within the City of Kelowna, but population growth across all parts of the region will drive the demand for local services and businesses that will also need to be met locally among each of the Central Okanagan's member jurisdictions and First Nations. It is also important to note that while Industrial lands have a relatively high provision of vacant and serviced land, most of the available supply is within the City of Kelowna and the inventory accounts for vacant land that may have already been committed to civic uses.



Economic Implications for the Region

The consequences of a constrained land supply are already being experienced across British Columbia, with several large employers and businesses in markets such as Metro Vancouver being unable to find suitable space to locate or expand their businesses. This has led to economic spillover to other parts of western Canada, some of which has been to the benefit of the Central Okanagan as both residents and business operators seek more affordable and attainable locations to live and do business.

But as its own employment land supply begins to dwindle, the Central Okanagan too could begin to feel growth pressure. Sustained periods of low vacancies among retail, office and industrial space over the past decade have largely been able to keep pace with demand through the timely delivery of new space, but as the available supply of vacant employment land depletes, it will become increasingly challenging to bring new space to the market. With less space available, businesses are likely to face increased competition and rising rents, factors that may begin to impact where employers choose to locate and grow their businesses, potentially shifting their economic activity to a different jurisdiction. If these trends manifest, outcomes could include:

- Should a business be unable to find space in their preferred local jurisdiction, such as the City of Kelowna, they may choose to find an alternative site across the bridge to the west, or northwards to Lake Country. The impact would be neutral for the region, but negative for Kelowna considering factors such as commute times and other travel behaviours.
- Should suitable space not be available in a nearby jurisdiction, the business may choose to relocate elsewhere in BC, resulting in a neutral impact for the province and a negative impact for Central Okanagan.
- Should a business be unable to find space in the province, as is happening amongst large industrial businesses already heading east to Alberta, the impact would be negative for the Central Okanagan and British Columbia.



The potential impacts of losing employment activity due to the lack of available land are threefold:

- The loss of local businesses could negatively affect the economy due to the loss of potential or existing jobs and tax revenues for governments.
- The further away these businesses locate, the greater the distance customers and workers will need to commute, and goods must be transported, resulting in increased fuel consumption, GHG emissions, traffic congestion and cost to consumers and commuters.
- The loss of employment activity across different sectors could weaken the region's economic diversity and resiliency, potentially exposing the economy to greater fluctuations in market cycles and broader economic shifts.

It is worth noting that adding new employment lands in the Central Okanagan could result in its own set of costs and challenges, including increased competition for land and the potential to increase traffic, business related emissions, and possible conflicts with other land uses. However, these costs and challenges are unlikely to be greater than the net loss and environmental impact that is likely to occur if these businesses relocate elsewhere.

While it can be challenging to make room for employment growth, the benefits to the region of a strong, robust regional economy mean we must be proactive to ensure the additional jobs and businesses that will want to locate in the Central Okanagan are supported. These businesses, across all sectors, represent an integral component for the continued development of resilient and complete communities, providing jobs and creating numerous other economic benefits that benefit residents and the broader region as a whole.

For this reason, proactive management and planning for continued growth across each of the different types of employment land are crucial for the long-term success of the Central Okanagan, its member jurisdictions, First Nations, and economic partners. The challenges facing employment land and economic planning are complex and will require a cooperative and coordinated effort from each jurisdiction to ensure shared success.

The RELI serves as a foundational tool to assist with this work. By providing a comprehensive understanding of what will be needed, the tool will inform the development of effective employment land studies, economic development and investment attraction studies, and policy solutions that ensure the Central Okanagan region is well positioned for continued and sustainable success.



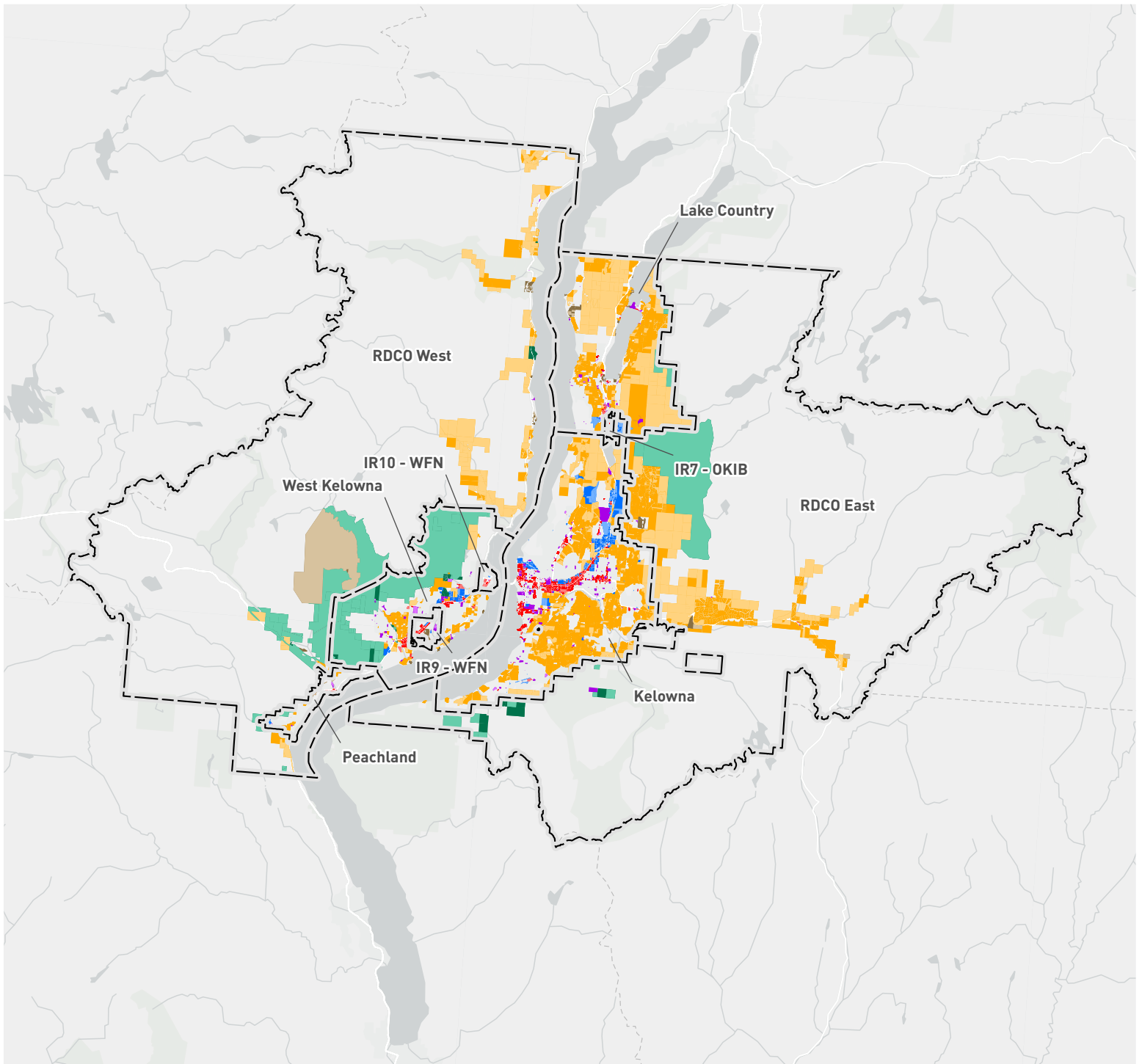
Next Steps

The data and findings from the RELI will be used to inform the Regional Employment Lands Strategy, scheduled to launch in 2026 as part of the Regional Growth Strategy Priority Projects Plan. Member municipalities and First Nations will work together to identify strategies to ensure an adequate supply of employment lands are identified throughout the region. This also presents an opportunity to develop recommendations and areas of analysis for future studies. Additional studies in support of the findings from the RELI and what it means for the region and jurisdictions may include the following:

- Conducting detailed analysis of Commercial employment by economic activity to better understand the demand and supply need of industry specific Commercial developments (e.g. office, large format commercial, boutique, retail, services, etc.)
- Similarly, detailed analysis on Institutional lands by economic activity to better understand the demand and supply need of industry and service specific Institutional developments (e.g. civic buildings, schools, health, etc.)
- Further analysis on the availability of Industrial lands by identifying Industrial lands that are committed for future civic uses (e.g. airport, transit facilities, landfill, etc.) and impacts of upcoming losses (e.g. Tolko Mill Site) to have a better understanding of what is required to meet demand.



APPENDIX A – DETAILED EMPLOYMENT LANDS STATISTICS AND INVENTORY MAPS



ELAC (Occupied)

- Agricultural
- Commercial
- Industrial
- Institutional
- Rural
- Tourist/Commercial Recreation

ELAC (Vacant)

- Agricultural
- Commercial
- Industrial
- Institutional
- Rural
- Tourist/Commercial Recreation

Municipal Boundary



1:500,000



Employment Land Inventory

Employment Land Classes

Regional District of Central Okanagan



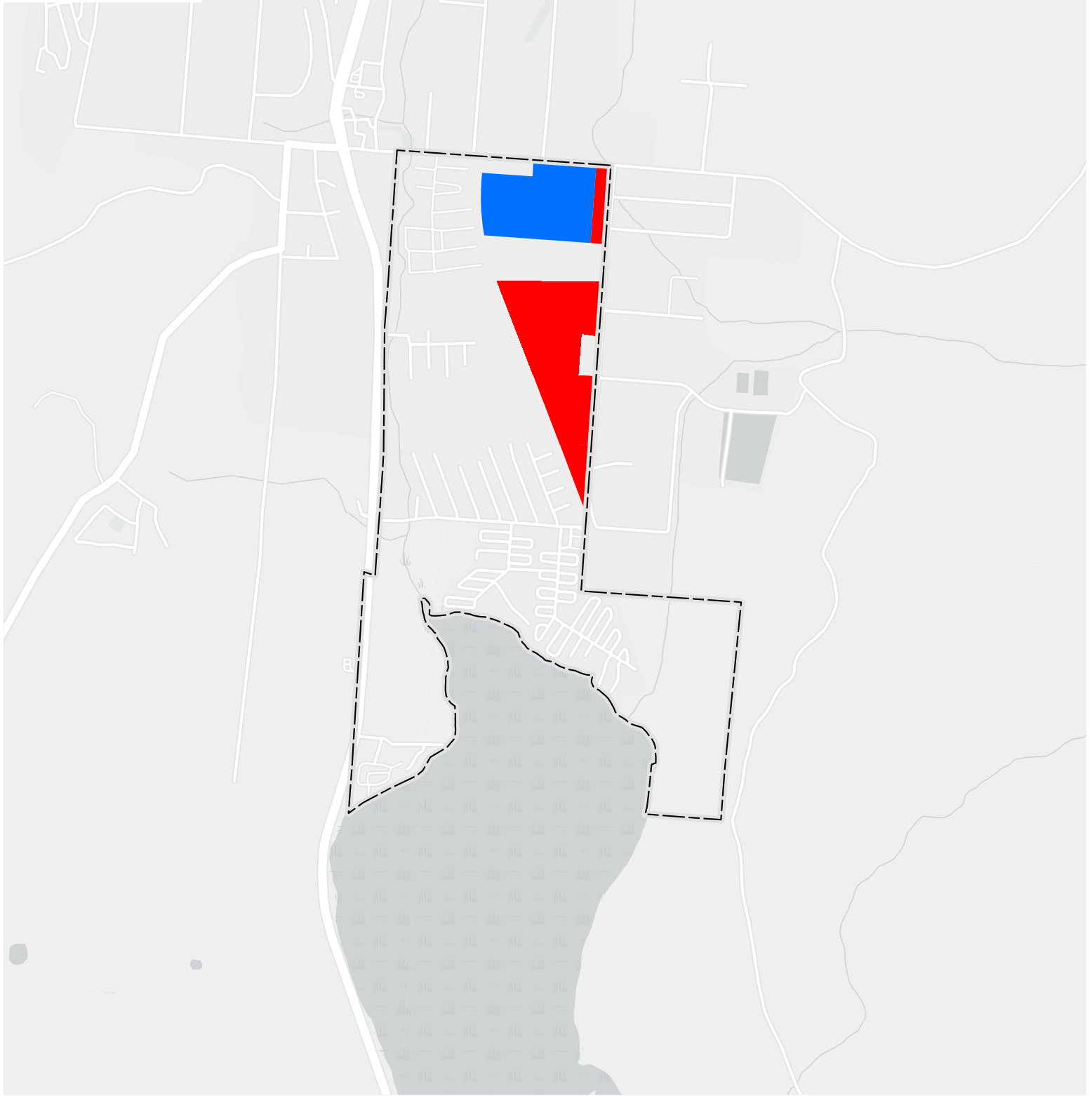
January 2025

REGION-WIDE	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	1,036.2	1,795.7	720.0	33,630.1	3,338.8	16,220.0
<i>Employment Only</i>	255.7	1,795.7	681.4	20,224.9	323.0	16,019.0
<i>Residential Permitted</i>	780.5	0.0	38.7	13,405.2	3,015.8	201.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	1,036.2	1,795.7	720.0	33,630.1	3,338.8	16,220.0
<i>Zoned</i>	1,085.3	1,724.0	611.7	23,941.5	281.5	18,820.9
<i>Zoning Matches OCP</i>	715.1	1,435.2	534.8	22,282.7	188.9	1,649.5
<i>Zoning Different from OCP</i>	321.1	360.6	185.3	11,347.5	3,149.9	14,570.5
OCCUPIED (ha)						
<i>Total</i>	877.2	1,198.6	654.4	16,310.6	310.9	778.2
<i>Employment Only</i>	208.9	1,198.6	617.5	11,152.0	255.2	711.3
<i>Residential Permitted</i>	668.3	0.0	36.9	5,158.7	55.8	66.9
<i>Zoning = ELAC</i>	642.8	1,044.9	488.4	13,189.7	113.7	457.7
<i>Employment Only</i>	181.4	1,044.9	457.8	9,641.4	90.0	454.8
<i>Residential Permitted</i>	461.4	0.0	30.6	3,548.3	23.8	2.8
<i>Zoning ≠ ELAC</i>	234.4	153.7	166.0	3,120.9	197.2	320.6
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	103.1	230.0	68.7	1,914.8	32.9	131.2
<i>Employment Only</i>	21.0	230.0	41.9	1,111.5	25.4	128.5
<i>Residential Permitted</i>	82.1	0.0	26.8	803.2	7.4	2.7
VACANT (ha)						
<i>Total</i>	159.0	597.1	65.6	17,319.5	3,027.8	15,441.8
<i>Currently Serviced</i>	136.6	409.4	51.0	1,718.5	38.1	4,132.4
<i>Planned Serviced</i>	136.6	473.4	51.0	2,015.1	38.1	4,132.4
<i>Has Frequent Transit</i>	67.4	49.3	14.4	168.7	0.3	0.0
<i>Planned Transit</i>	101.3	145.3	20.5	1,704.1	32.7	1,012.9
<i>Not Otherwise Constrained</i>	49.0	80.4	31.5	1,309.4	7.4	153.1
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	17,110	11,135	8,460	765	335	95
<i>Medium Scenario</i>	21,350	13,700	9,945	770	320	105
<i>High Scenario</i>	26,575	17,165	13,000	770	400	140
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	194.5	244.8	191.1	2,741.0	34.8	71.7
<i>Medium Scenario</i>	242.2	301.1	222.3	2,741.0	33.4	79.3
<i>High Scenario</i>	299.9	377.5	281.1	2,741.0	42.3	105.7
<i>Lowest Vacant Gap</i>	(31.9)	352.4	(121.6)	14,578.5	2,994.4	15,370.1
<i>Lowest Serviced Gap</i>	(54.3)	164.6	(136.3)	(1,022.5)	4.7	4,060.7
<i>Highest Vacant Gap</i>	(151.3)	212.7	(223.8)	14,578.5	2,985.6	15,336.1
<i>Highest Serviced Gap</i>	(173.7)	24.9	(238.4)	(1,022.5)	(4.2)	4,026.7

*number units in hectares (ha)

**numbers may not sum due to rounding

ELAC (Occupied)
Commercial
Industrial
Municipal Boundary



1:20,000

Employment Land Inventory

Employment Land Classes: IR7 - OKIB

Regional District of Central Okanagan



IR #7 - OK INDIAN BAND	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	17.8	11.3	0.0	0.0	0.0	0.0
<i>Employment Only</i>	17.8	11.3	0.0	0.0	0.0	0.0
<i>Residential Permitted</i>	0.0	0.0	0.0	0.0	0.0	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	17.8	11.3	0.0	0.0	0.0	0.0
<i>Zoned</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Zoning Matches OCP</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Zoning Different from OCP</i>	17.8	11.3	0.0	0.0	0.0	0.0
OCCUPIED (ha)						
<i>Total</i>	17.8	11.3	0.0	0.0	0.0	0.0
<i>Employment Only</i>	17.8	11.3	0.0	0.0	0.0	0.0
<i>Residential Permitted</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Zoning = ELAC</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Employment Only</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Residential Permitted</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Zoning ≠ ELAC</i>	17.8	11.3	0.0	0.0	0.0	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Employment Only</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Residential Permitted</i>	0.0	0.0	0.0	0.0	0.0	0.0
VACANT (ha)						
<i>Total</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Currently Serviced</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Planned Serviced</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Has Frequent Transit</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Planned Transit</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Not Otherwise Constrained</i>	0.0	0.0	0.0	0.0	0.0	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	15	130	-	-	-	-
<i>Medium Scenario</i>	15	160	-	-	-	-
<i>High Scenario</i>	40	220	-	-	-	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	0.2	2.9	0.0	0.0	0.0	0.0
<i>Medium Scenario</i>	0.2	3.5	0.0	0.0	0.0	0.0
<i>High Scenario</i>	0.5	4.8	0.0	0.0	0.0	0.0
<i>Lowest Vacant Gap</i>	(0.2)	(2.9)	0.0	0.0	0.0	0.0
<i>Lowest Serviced Gap</i>	(0.2)	(2.9)	0.0	0.0	0.0	0.0
<i>Highest Vacant Gap</i>	(0.5)	(4.8)	0.0	0.0	0.0	0.0
<i>Highest Serviced Gap</i>	(0.5)	(4.8)	0.0	0.0	0.0	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding

ELAC (Occupied)

Commercial

Industrial

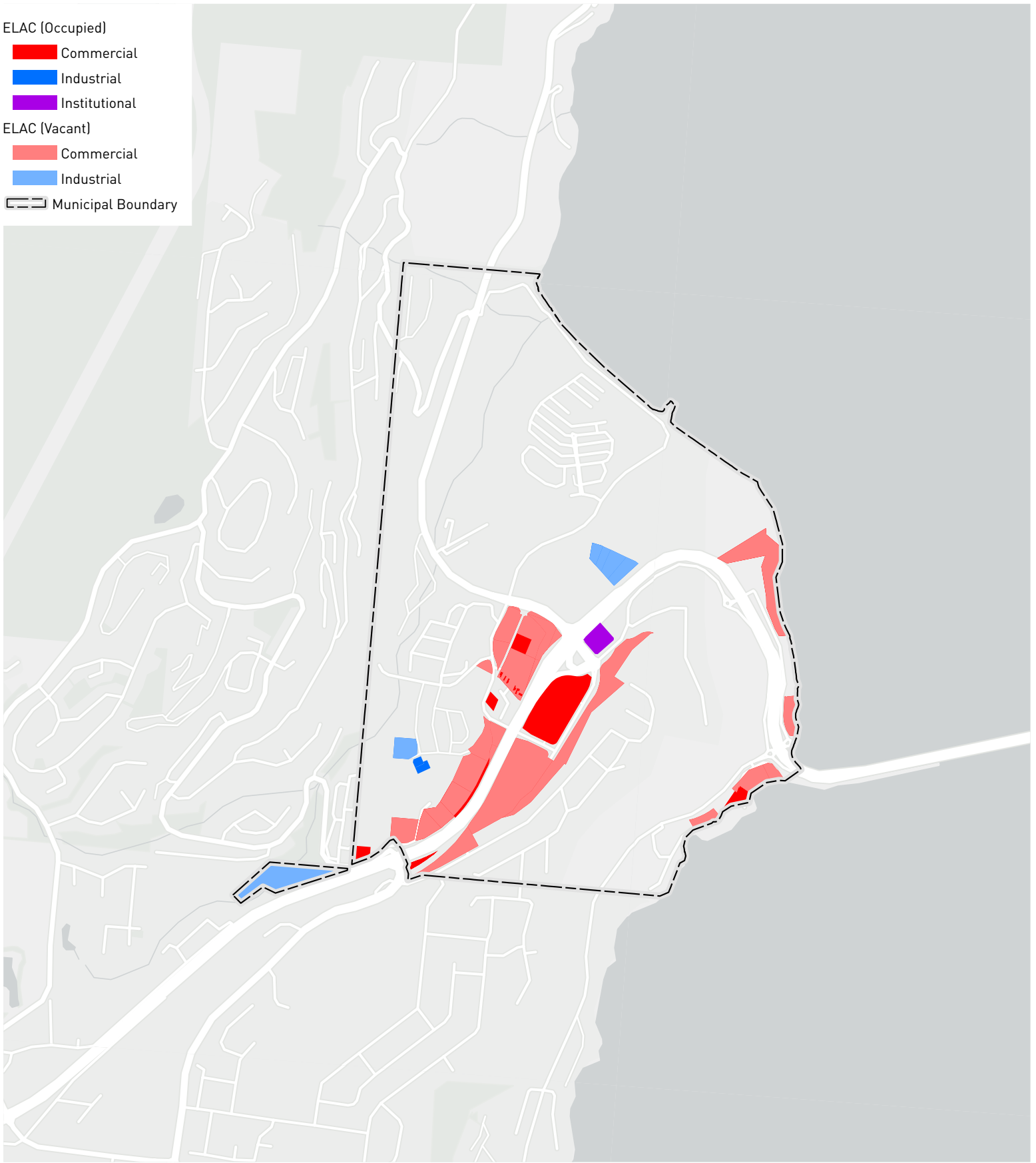
Institutional

ELAC (Vacant)

Commercial

Industrial

Municipal Boundary



1:20,000

Employment Land Inventory

Employment Land Classes: IR10 - WFN

Regional District of Central Okanagan



IR #9 – WESTBANK FN	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	71.2	25.2	17.1	0.0	44.3	0.0
<i>Employment Only</i>	54.0	5.9	17.1	0.0	44.3	0.0
<i>Residential Permitted</i>	17.1	0.0	0.0	0.0	0.0	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	71.2	25.2	17.1	0.0	44.3	0.0
<i>Zoned</i>	71.2	23.6	17.1	0.0	5.7	0.0
<i>Zoning Matches OCP</i>	71.2	23.6	17.1	0.0	5.7	0.0
<i>Zoning Different from OCP</i>	0.0	1.6	0.0	0.0	38.6	0.0
OCCUPIED (ha)						
<i>Total</i>	65.2	19.3	11.2	0.0	38.6	0.0
<i>Employment Only</i>	48.4	19.3	11.2	0.0	38.6	0.0
<i>Residential Permitted</i>	16.8	0.0	0.0	0.0	0.0	0.0
<i>Zoning = ELAC</i>	65.2	19.3	11.2	0.0	0.0	0.0
<i>Employment Only</i>	48.4	19.3	11.2	0.0	0.0	0.0
<i>Residential Permitted</i>	16.8	0.0	0.0	0.0	0.0	0.0
<i>Zoning ≠ ELAC</i>	0.0	0.0	0.0	0.0	38.6	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	9.6	5.3	3.2	0.0	0.0	0.0
<i>Employment Only</i>	9.0	5.3	3.2	0.0	0.0	0.0
<i>Residential Permitted</i>	0.5	0.0	0.0	0.0	0.0	0.0
VACANT (ha)						
<i>Total</i>	6.0	5.9	5.9	0.0	5.7	0.0
<i>Currently Serviced</i>	6.0	5.9	5.9	0.0	5.7	0.0
<i>Planned Serviced</i>	6.0	5.9	5.9	0.0	5.7	0.0
<i>Has Frequent Transit</i>	5.7	0.4	0.0	0.0	0.0	0.0
<i>Planned Transit</i>	6.0	5.9	5.7	0.0	5.7	0.0
<i>Not Otherwise Constrained</i>	6.0	4.3	5.9	0.0	5.7	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	1,320	340	405	-	35	-
<i>Medium Scenario</i>	1,215	345	405	-	30	-
<i>High Scenario</i>	1,700	475	360	-	40	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	17.6	7.5	18.2	0.0	3.7	0.0
<i>Medium Scenario</i>	16.2	7.6	18.2	0.0	3.2	0.0
<i>High Scenario</i>	22.6	10.4	16.2	0.0	4.2	0.0
<i>Lowest Vacant Gap</i>	(10.2)	(1.6)	(10.3)	0.0	2.6	0.0
<i>Lowest Serviced Gap</i>	(10.2)	(1.6)	(10.3)	0.0	2.6	0.0
<i>Highest Vacant Gap</i>	(16.6)	(4.5)	(12.3)	0.0	1.5	0.0
<i>Highest Serviced Gap</i>	(16.6)	(4.5)	(12.3)	0.0	1.5	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding

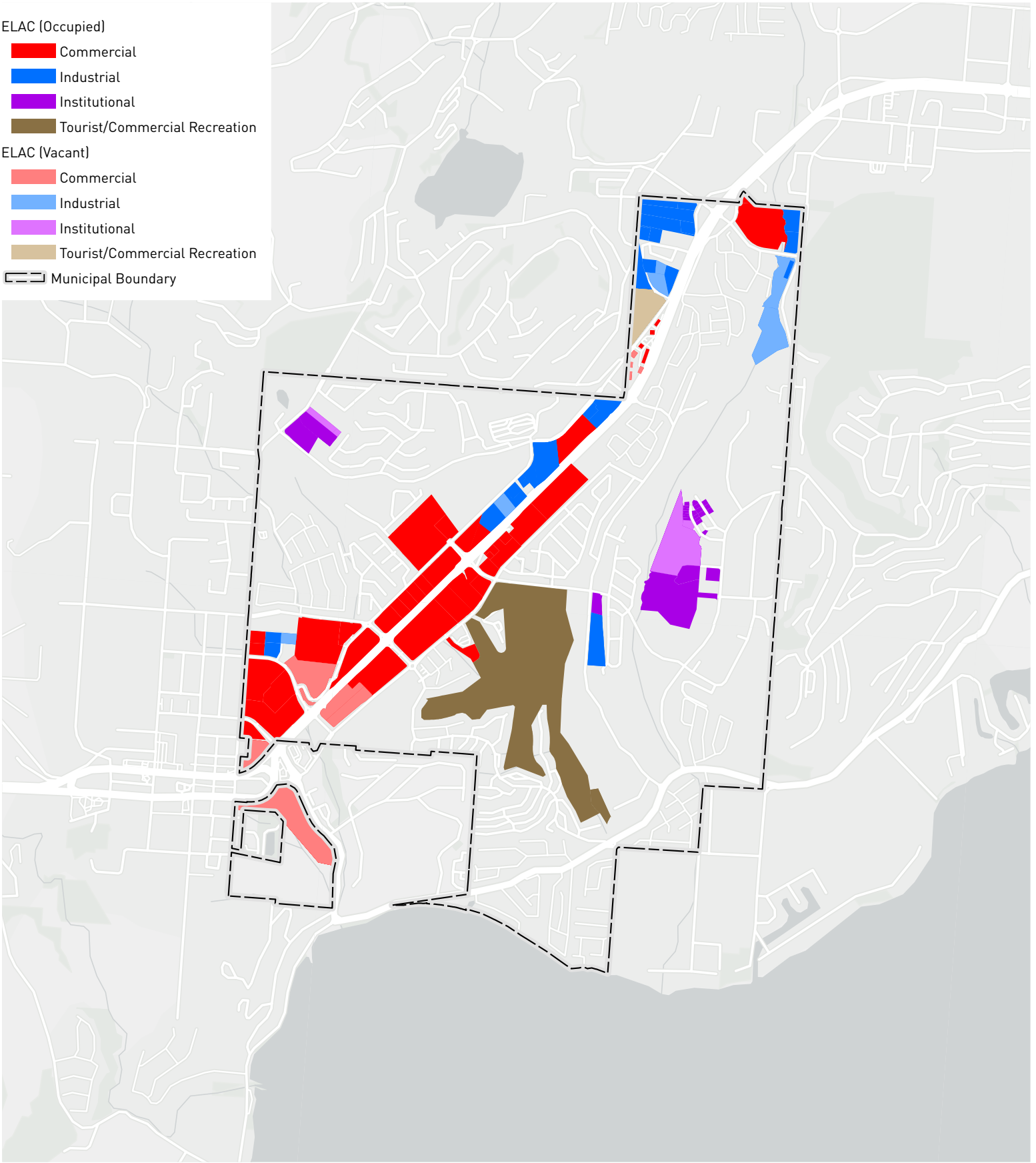
ELAC (Occupied)

- Commercial
- Industrial
- Institutional
- Tourist/Commercial Recreation

ELAC (Vacant)

- Commercial
- Industrial
- Institutional
- Tourist/Commercial Recreation

Municipal Boundary



1:25,000

Employment Land Inventory

Employment Land Classes: IR9 - WFN

Regional District of Central Okanagan



IR#10 – WESTBANK FN	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	34.1	5.9	0.8	0.0	0.0	0.0
<i>Employment Only</i>	26.4	5.9	0.8	0.0	0.0	0.0
<i>Residential Permitted</i>	7.7	0.0	0.0	0.0	0.0	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	34.1	5.9	0.8	0.0	0.0	0.0
<i>Zoned</i>	34.1	5.9	0.8	0.0	0.0	0.0
<i>Zoning Matches OCP</i>	34.1	5.9	0.8	0.0	0.0	0.0
<i>Zoning Different from OCP</i>	0.0	0.0	0.0	0.0	0.0	0.0
OCCUPIED (ha)						
<i>Total</i>	10.6	0.6	0.8	0.0	0.0	0.0
<i>Employment Only</i>	7.5	0.6	0.8	0.0	0.0	0.0
<i>Residential Permitted</i>	3.1	0.0	0.0	0.0	0.0	0.0
<i>Zoning = ELAC</i>	10.6	0.6	0.8	0.0	0.0	0.0
<i>Employment Only</i>	7.5	0.6	0.8	0.0	0.0	0.0
<i>Residential Permitted</i>	3.1	0.0	0.0	0.0	0.0	0.0
<i>Zoning ≠ ELAC</i>	0.0	0.0	0.0	0.0	0.0	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	2.3	0.3	0.0	0.0	0.0	0.0
<i>Employment Only</i>	0.6	0.3	0.0	0.0	0.0	0.0
<i>Residential Permitted</i>	1.8	0.0	0.0	0.0	0.0	0.0
VACANT (ha)						
<i>Total</i>	23.5	5.4	0.0	0.0	0.0	0.0
<i>Currently Serviced</i>	23.5	5.1	0.0	0.0	0.0	0.0
<i>Planned Serviced</i>	23.5	5.1	0.0	0.0	0.0	0.0
<i>Has Frequent Transit</i>	7.3	1.4	0.0	0.0	0.0	0.0
<i>Planned Transit</i>	23.5	5.4	0.0	0.0	0.0	0.0
<i>Not Otherwise Constrained</i>	15.0	2.4	0.0	0.0	0.0	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	265	100	40	-	-	-
<i>Medium Scenario</i>	1,365	505	285	-	-	-
<i>High Scenario</i>	580	190	145	-	-	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	3.5	2.2	1.8	0.0	0.0	0.0
<i>Medium Scenario</i>	18.2	11.1	12.8	0.0	0.0	0.0
<i>High Scenario</i>	7.7	4.2	6.5	0.0	0.0	0.0
<i>Lowest Vacant Gap</i>	19.9	3.2	(1.8)	0.0	0.0	0.0
<i>Lowest Serviced Gap</i>	19.9	2.9	(1.8)	0.0	0.0	0.0
<i>Highest Vacant Gap</i>	5.3	(5.7)	(12.8)	0.0	0.0	0.0
<i>Highest Serviced Gap</i>	5.3	(6.0)	(12.8)	0.0	0.0	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding

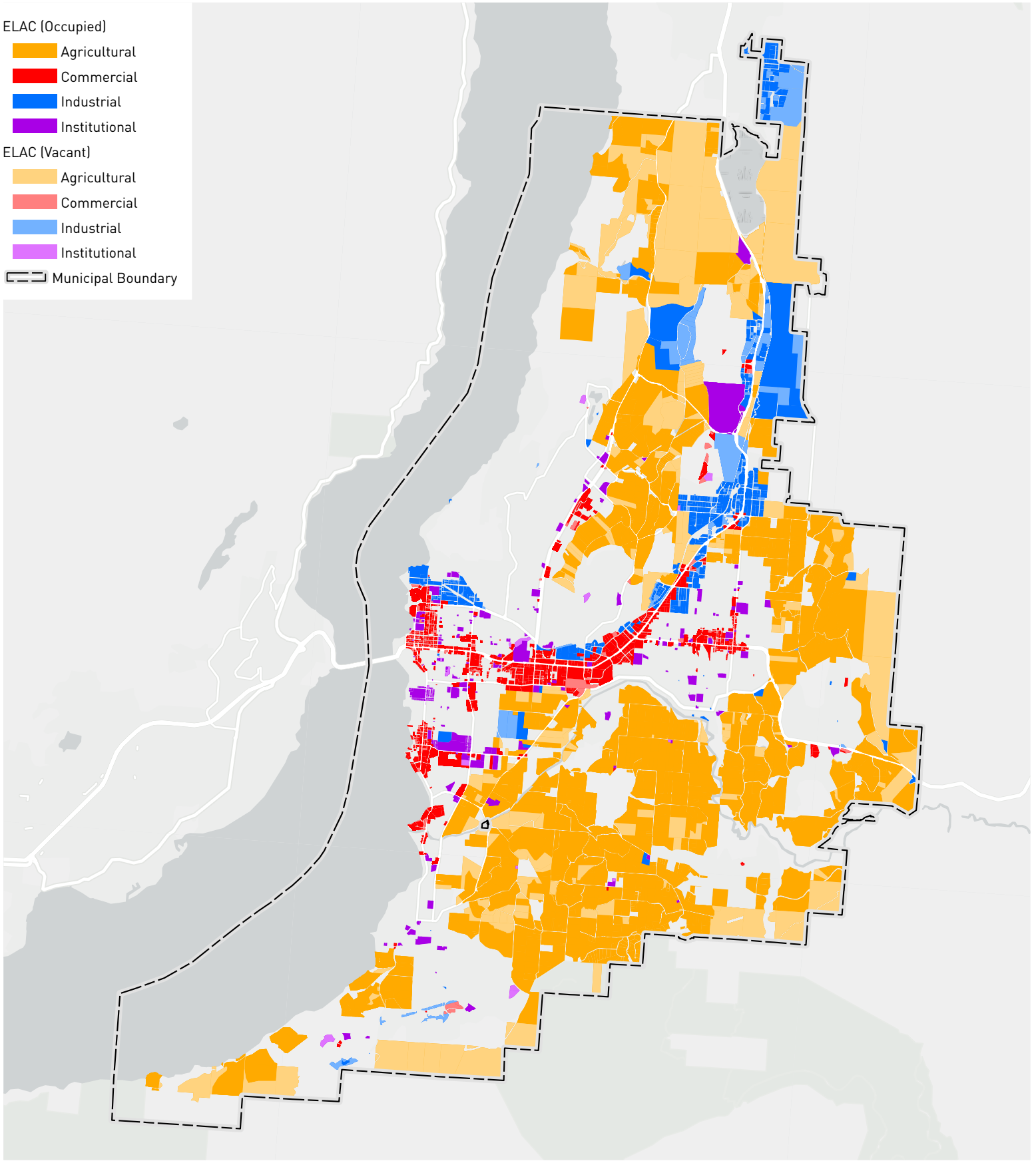
ELAC (Occupied)

- Agricultural
- Commercial
- Industrial
- Institutional

ELAC (Vacant)

- Agricultural
- Commercial
- Industrial
- Institutional

Municipal Boundary



1:125,000



Employment Land Inventory

Employment Land Classes: Kelowna

Regional District of Central Okanagan

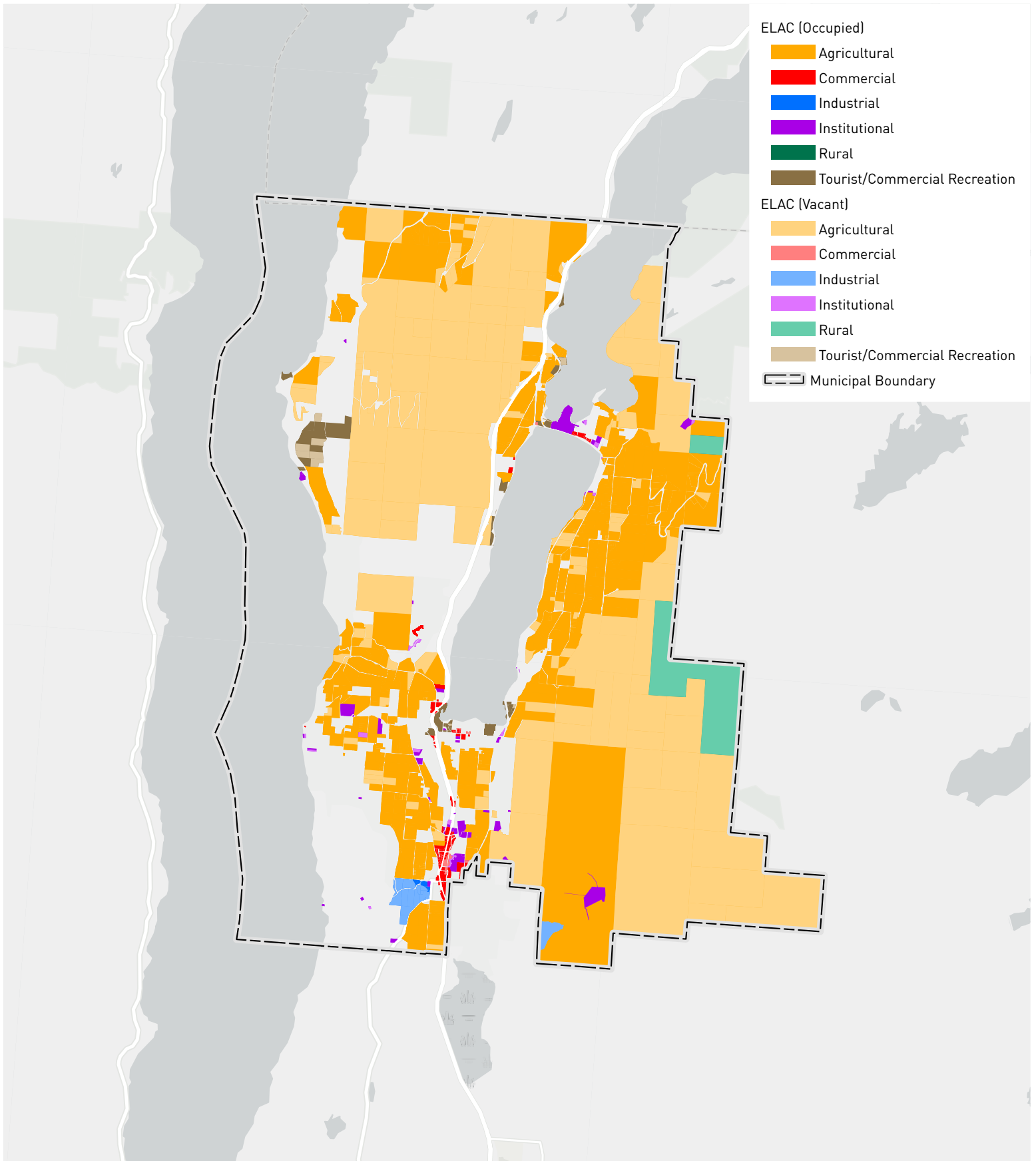


January 2025

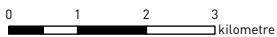
KELOWNA	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	624.6	1,521.0	410.1	9,409.2	0.0	0.0
<i>Employment Only</i>	107.0	1,521.0	371.8	9,409.2	0.0	0.0
<i>Residential Permitted</i>	517.7	0.0	38.2	0.0	0.0	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	624.6	1,521.0	410.1	9,409.2	0.0	0.0
<i>Zoned</i>	819.0	1,356.4	358.7	7,296.3	0.0	2,175.7
<i>Zoning Matches OCP</i>	517.2	1,208.4	354.7	7,080.9	0.0	0.0
<i>Zoning Different from OCP</i>	107.4	312.7	55.4	2,328.3	0.0	0.0
OCCUPIED (ha)						
<i>Total</i>	565.0	999.2	379.0	6,375.1	0.0	6,375.1
<i>Employment Only</i>	102.1	999.2	342.5	6,375.1	0.0	6,375.1
<i>Residential Permitted</i>	462.9	0.0	36.4	0.0	0.0	0.0
<i>Zoning = ELAC</i>	487.6	874.4	325.3	5,647.9	0.0	0.0
<i>Employment Only</i>	102.1	874.4	295.1	5,647.9	0.0	0.0
<i>Residential Permitted</i>	385.6	0.0	30.1	0.0	0.0	0.0
<i>Zoning ≠ ELAC</i>	77.3	124.8	53.7	727.2	0.0	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	67.3	173.1	43.2	720.5	0.0	0.0
<i>Employment Only</i>	3.1	173.1	16.4	720.5	0.0	0.0
<i>Residential Permitted</i>	64.2	0.0	26.8	0.0	0.0	0.0
VACANT (ha)						
<i>Total</i>	59.7	521.8	31.1	3,034.1	0.0	0.0
<i>Currently Serviced</i>	59.6	344.4	23.4	972.0	0.0	0.0
<i>Planned Serviced</i>	59.6	408.5	23.4	1,268.6	0.0	0.0
<i>Has Frequent Transit</i>	44.2	47.2	9.6	105.8	0.0	0.0
<i>Planned Transit</i>	46.2	127.2	12.9	755.4	0.0	0.0
<i>Not Otherwise Constrained</i>	17.7	59.6	23.0	563.1	0.0	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	12,950	8,690	6,830	470	-	-
<i>Medium Scenario</i>	16,360	10,720	8,105	470	-	-
<i>High Scenario</i>	21,035	13,715	10,950	470	-	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	139.2	191.1	117.6	945.3	0.0	0.0
<i>Medium Scenario</i>	175.9	235.7	139.6	945.3	0.0	0.0
<i>High Scenario</i>	226.1	301.6	188.6	945.3	0.0	0.0
<i>Lowest Vacant Gap</i>	(79.5)	330.8	(86.5)	2,088.8	0.0	0.0
<i>Lowest Serviced Gap</i>	(79.6)	153.4	(94.2)	26.6	0.0	0.0
<i>Highest Vacant Gap</i>	(166.5)	220.3	(157.5)	2,088.8	0.0	0.0
<i>Highest Serviced Gap</i>	(166.6)	42.9	(165.2)	26.6	0.0	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding



1:110,000



Employment Land Inventory

Employment Land Classes: Lake Country

Regional District of Central Okanagan



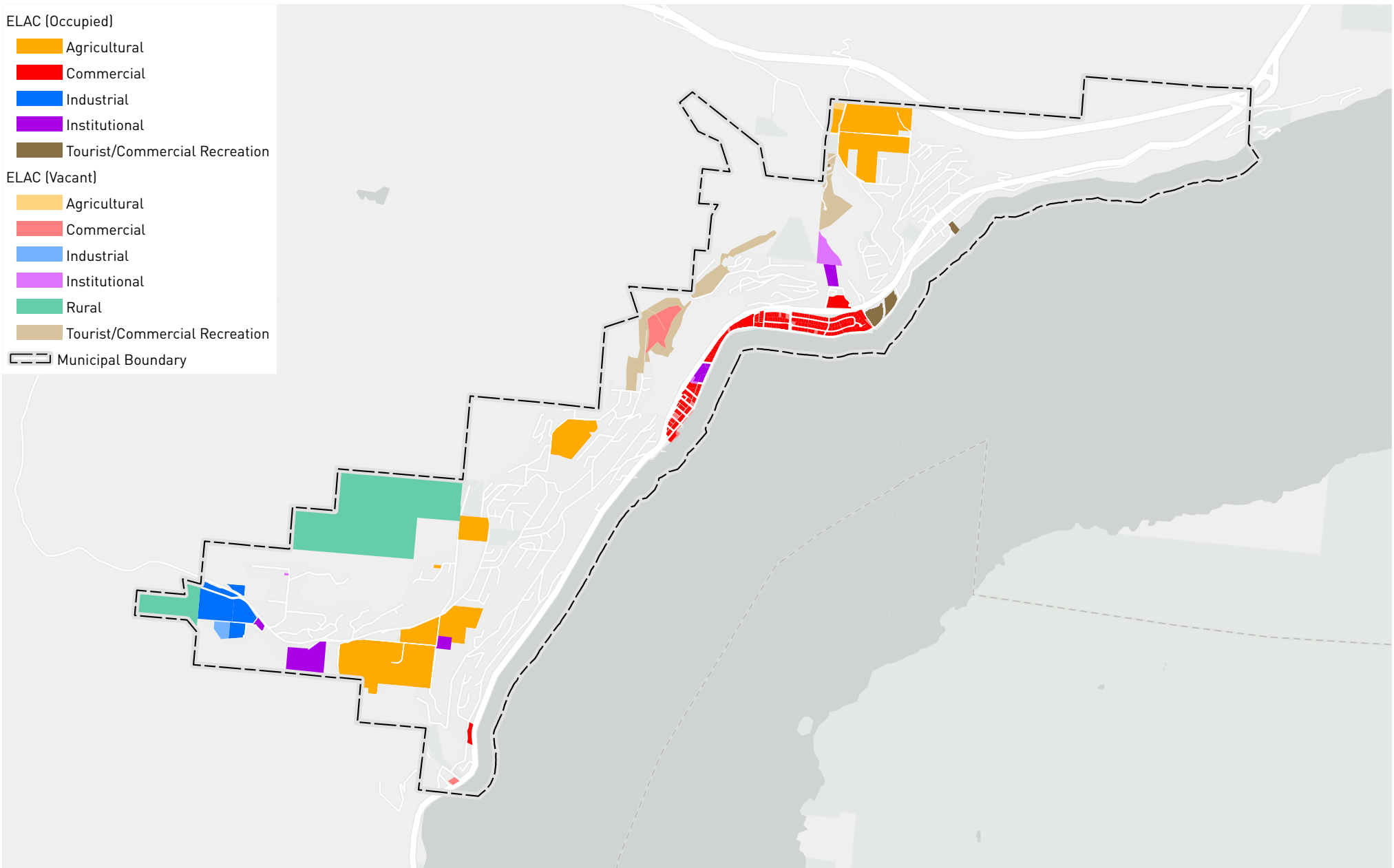
January 2025

LAKE COUNTRY	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	65.9	48.0	95.5	8,872.5	115.7	331.7
<i>Employment Only</i>	29.5	48.0	95.0	8,872.5	115.7	331.7
<i>Residential Permitted</i>	36.4	0.0	0.4	0.0	0.0	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	65.9	48.0	95.5	8,872.5	115.7	331.7
<i>Zoned</i>	30.8	69.7	53.2	3,521.3	37.0	3,521.3
<i>Zoning Matches OCP</i>	30.8	27.5	50.9	5,696.2	35.0	331.7
<i>Zoning Different from OCP</i>	35.1	20.5	44.6	3,176.3	80.7	0.0
OCCUPIED (ha)						
<i>Total</i>	48.0	3.7	83.9	3,406.7	87.9	0.0
<i>Employment Only</i>	15.7	3.7	83.5	3,406.7	87.9	0.0
<i>Residential Permitted</i>	32.4	0.0	0.4	0.0	0.0	0.0
<i>Zoning = ELAC</i>	26.7	0.6	46.4	2,646.5	32.0	0.0
<i>Employment Only</i>	8.2	0.6	46.0	2,646.5	32.0	0.0
<i>Residential Permitted</i>	18.4	0.0	0.4	0.0	0.0	0.0
<i>Zoning ≠ ELAC</i>	21.4	3.1	37.5	727.2	0.0	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	7.0	0.6	4.2	290.4	11.3	0.0
<i>Employment Only</i>	3.3	0.6	4.2	290.4	11.3	0.0
<i>Residential Permitted</i>	3.7	0.0	0.0	0.0	0.0	0.0
VACANT (ha)						
<i>Total</i>	17.9	44.3	11.6	5,465.7	27.8	331.7
<i>Currently Serviced</i>	4.8	36.2	5.6	451.6	0.0	0.0
<i>Planned Serviced</i>	4.8	36.2	5.6	451.6	0.0	0.0
<i>Has Frequent Transit</i>	4.0	0.0	4.0	51.1	0.3	0.0
<i>Planned Transit</i>	4.0	4.6	5.6	834.1	2.5	0.0
<i>Not Otherwise Constrained</i>	3.9	6.3	1.4	131.4	0.0	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	730	410	305	105	145	-
<i>Medium Scenario</i>	1,085	550	515	105	160	-
<i>High Scenario</i>	730	410	305	105	145	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	10.4	8.7	14.2	628.5	15.4	0.0
<i>Medium Scenario</i>	9.7	9.0	13.7	628.5	15.4	0.0
<i>High Scenario</i>	14.4	12.1	23.1	628.5	16.9	0.0
<i>Lowest Vacant Gap</i>	8.2	35.6	(2.1)	4,837.3	27.8	331.7
<i>Lowest Serviced Gap</i>	(4.9)	27.6	(8.1)	(176.9)	(15.4)	0.0
<i>Highest Vacant Gap</i>	3.4	32.2	(11.5)	4,837.3	10.8	331.7
<i>Highest Serviced Gap</i>	(9.6)	24.2	(17.6)	(176.9)	(16.9)	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding

- ELAC (Occupied)
- Agricultural
 - Commercial
 - Industrial
 - Institutional
 - Tourist/Commercial Recreation
- ELAC (Vacant)
- Agricultural
 - Commercial
 - Industrial
 - Institutional
 - Rural
 - Tourist/Commercial Recreation
- Municipal Boundary



1:50,000



Employment Land Inventory

Employment Land Classes: Peachland

Regional District of Central Okanagan



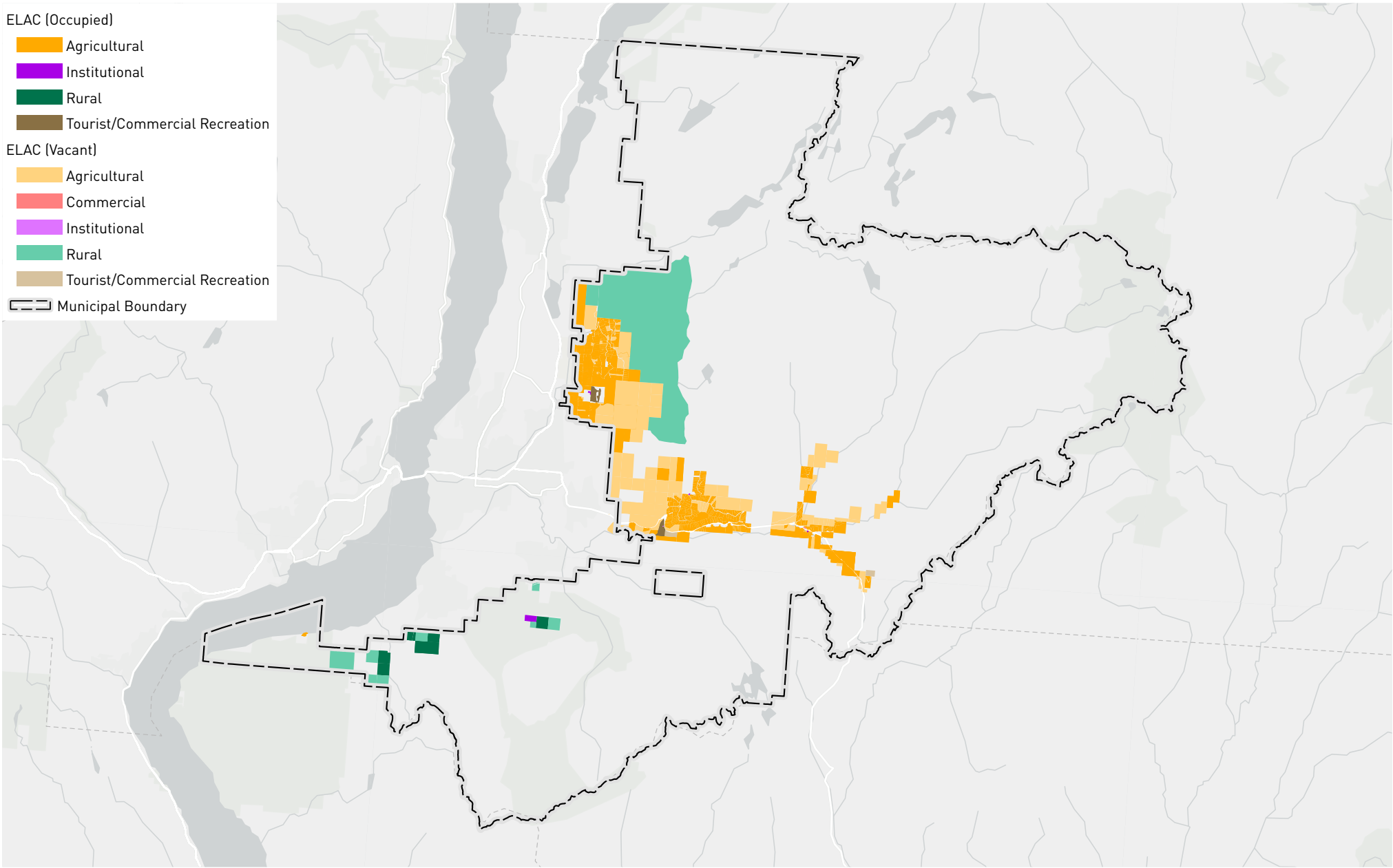
January 2025

PEACHLAND	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	34.0	18.7	20.3	108.8	37.6	113.3
<i>Employment Only</i>	8.8	18.7	20.3	108.8	9.0	113.3
<i>Residential Permitted</i>	25.2	0.0	0.0	0.0	28.7	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	34.0	18.7	20.3	108.8	37.6	113.3
<i>Zoned</i>	7.0	16.3	20.9	251.2	11.1	251.2
<i>Zoning Matches OCP</i>	7.0	16.3	20.3	100.7	9.5	0.0
<i>Zoning Different from OCP</i>	26.9	2.4	0.0	8.2	28.1	113.3
OCCUPIED (ha)						
<i>Total</i>	24.7	16.6	15.9	107.5	4.3	0.0
<i>Employment Only</i>	7.6	16.6	15.9	107.5	0.0	0.0
<i>Residential Permitted</i>	17.1	0.0	0.0	0.0	4.3	0.0
<i>Zoning = ELAC</i>	6.1	14.2	15.9	100.7	0.7	0.0
<i>Employment Only</i>	5.4	14.2	15.9	100.7	0.0	0.0
<i>Residential Permitted</i>	0.7	0.0	0.0	0.0	0.7	0.0
<i>Zoning ≠ ELAC</i>	18.6	2.4	0.0	6.8	3.6	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	1.6	2.0	1.6	22.9	0.0	0.0
<i>Employment Only</i>	1.4	2.0	1.6	22.9	0.0	0.0
<i>Residential Permitted</i>	0.2	0.0	0.0	0.0	0.0	0.0
VACANT (ha)						
<i>Total</i>	9.3	2.1	4.4	1.4	33.3	113.3
<i>Currently Serviced</i>	1.9	0.0	4.3	0.0	32.4	0.0
<i>Planned Serviced</i>	1.9	0.0	4.3	0.0	32.4	0.0
<i>Has Frequent Transit</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Planned Transit</i>	8.8	2.1	4.3	0.0	24.5	113.3
<i>Not Otherwise Constrained</i>	0.8	2.1	0.3	0.0	0.6	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	180	70	10	15	10	-
<i>Medium Scenario</i>	165	65	10	15	10	-
<i>High Scenario</i>	220	95	25	15	15	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	2.4	1.5	0.4	89.8	1.1	0.0
<i>Medium Scenario</i>	2.2	1.4	0.4	89.8	1.1	0.0
<i>High Scenario</i>	2.9	2.1	1.1	89.8	1.6	0.0
<i>Lowest Vacant Gap</i>	7.1	0.6	4.0	(88.4)	32.3	113.3
<i>Lowest Serviced Gap</i>	(0.3)	(1.4)	3.9	(89.8)	31.3	0.0
<i>Highest Vacant Gap</i>	6.3	(0.0)	3.3	(88.4)	31.7	113.3
<i>Highest Serviced Gap</i>	(1.0)	(2.1)	3.2	(89.8)	30.8	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding

- ELAC (Occupied)
- Agricultural
 - Institutional
 - Rural
 - Tourist/Commercial Recreation
- ELAC (Vacant)
- Agricultural
 - Commercial
 - Institutional
 - Rural
 - Tourist/Commercial Recreation
- Municipal Boundary



1:350,000



Employment Land Inventory

Employment Land Classes: RDCO East

Regional District of Central Okanagan



January 2025

RDCO EAST	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	1.6	0.0	38.0	8,796.1	137.2	5,600.9
<i>Employment Only</i>	1.6	0.0	38.0	748.0	112.9	5,466.8
<i>Residential Permitted</i>	0.0	0.0	0.0	8,048.1	24.3	134.1
DETAILED (ha)						
<i>OCP Future Land Use</i>	1.6	0.0	38.0	8,796.1	137.2	5,600.9
<i>Zoned</i>	1.6	0.0	12.8	3,787.2	153.8	3,787.2
<i>Zoning Matches OCP</i>	1.6	0.0	5.8	7,459.8	89.2	958.3
<i>Zoning Different from OCP</i>	0.0	0.0	32.2	1,336.3	48.0	4,642.6
OCCUPIED (ha)						
<i>Total</i>	0.0	0.0	37.9	4,273.6	87.7	447.3
<i>Employment Only</i>	0.0	0.0	37.9	731.2	87.7	447.3
<i>Residential Permitted</i>	0.0	0.0	0.0	3,542.4	0.0	0.0
<i>Zoning = ELAC</i>	0.0	0.0	5.7	3,546.2	39.7	447.3
<i>Employment Only</i>	0.0	0.0	5.7	731.2	39.7	447.3
<i>Residential Permitted</i>	0.0	0.0	0.0	2,814.9	0.0	0.0
<i>Zoning ≠ ELAC</i>	0.0	0.0	32.2	727.4	48.0	0.0
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	0.0	0.0	0.1	725.8	0.0	128.5
<i>Employment Only</i>	0.0	0.0	0.1	32.4	0.0	128.5
<i>Residential Permitted</i>	0.0	0.0	0.0	693.5	0.0	0.0
VACANT (ha)						
<i>Total</i>	1.6	0.0	0.1	4,522.4	49.6	5,153.6
<i>Currently Serviced</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Planned Serviced</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Has Frequent Transit</i>	0.0	0.0	0.0	4.9	0.0	0.0
<i>Planned Transit</i>	0.0	0.0	0.0	4.9	0.0	0.0
<i>Not Otherwise Constrained</i>	0.0	0.0	0.1	432.7	0.0	64.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	55	-	(5)	10	20	70
<i>Medium Scenario</i>	55	-	(10)	10	20	80
<i>High Scenario</i>	85	-	10	10	30	115
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	0.7	0.0	(0.2)	59.9	2.1	52.9
<i>Medium Scenario</i>	0.7	0.0	(0.4)	59.9	2.1	60.4
<i>High Scenario</i>	1.1	0.0	0.4	59.9	3.2	86.8
<i>Lowest Vacant Gap</i>	0.8	0.0	0.4	4,462.6	47.5	5,100.8
<i>Lowest Serviced Gap</i>	(0.7)	0.0	0.4	(59.9)	(2.1)	(52.9)
<i>Highest Vacant Gap</i>	0.4	0.0	(0.4)	4,462.6	46.4	5,066.8
<i>Highest Serviced Gap</i>	(1.1)	0.0	(0.4)	(59.9)	(3.2)	(86.8)

*number units in hectares (ha)

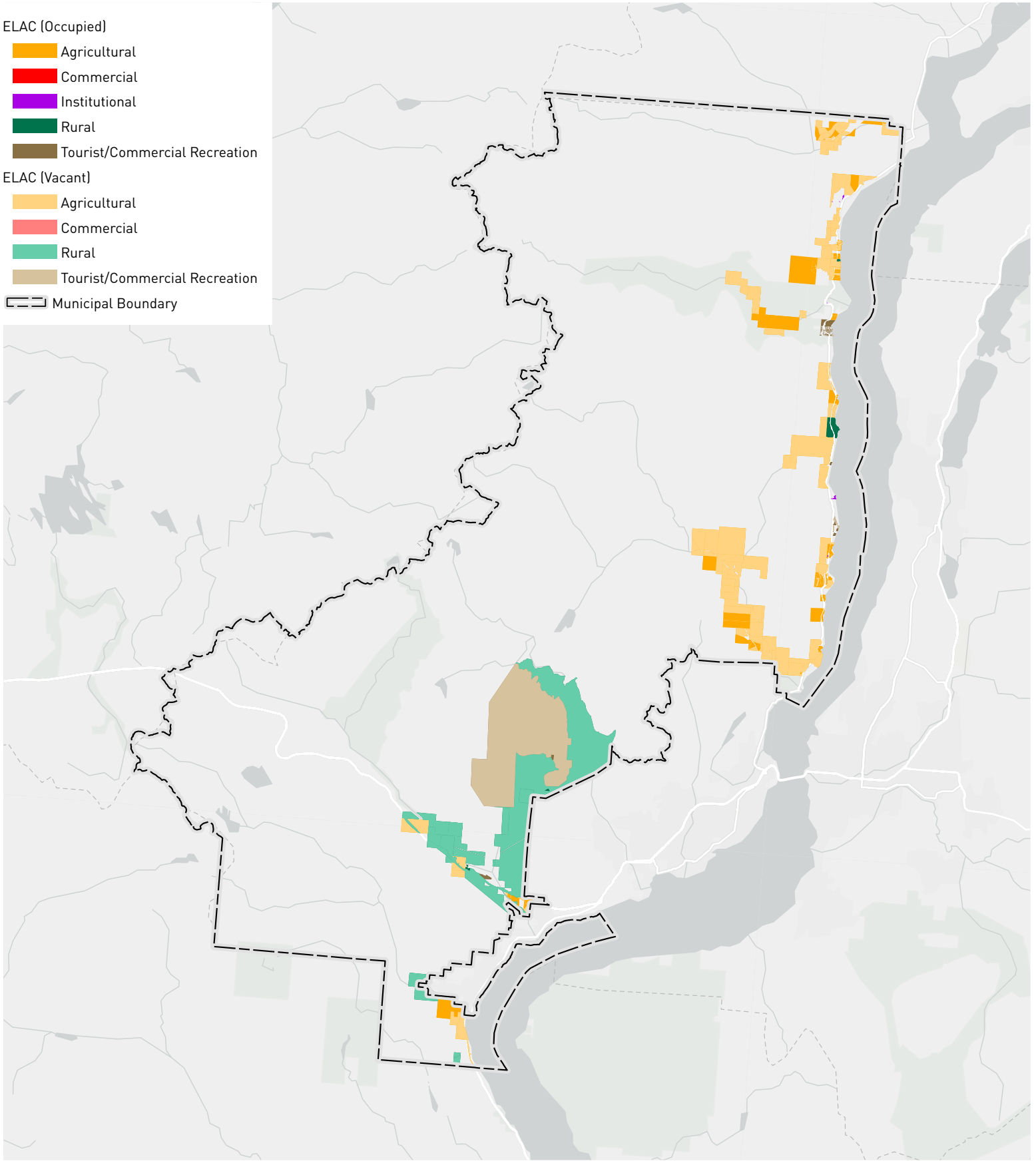
**numbers may not sum due to rounding

ELAC (Occupied)

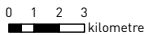
- Agricultural
- Commercial
- Institutional
- Rural
- Tourist/Commercial Recreation

ELAC (Vacant)

- Agricultural
- Commercial
- Rural
- Tourist/Commercial Recreation
- Municipal Boundary



1:300,000



Employment Land Inventory

Employment Land Classes: RDCO West

Regional District of Central Okanagan



January 2025

RDCO WEST	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	0.4	0.0	6.4	5,236.2	2,974.9	3,951.5
<i>Employment Only</i>	0.4	0.0	6.4	925.5	12.0	3,884.6
<i>Residential Permitted</i>	0.0	0.0	0.0	4,310.8	2,962.9	66.9
DETAILED (ha)						
<i>OCP Future Land Use</i>	0.4	0.0	6.4	5,236.2	2,974.9	3,951.5
<i>Zoned</i>	68.7	40.0	26.5	9,085.5	66.5	9,085.5
<i>Zoning Matches OCP</i>	0.3	0.0	6.3	767.4	43.2	359.5
<i>Zoning Different from OCP</i>	0.1	0.0	0.1	4,468.9	2,931.7	3,592.0
OCCUPIED (ha)						
<i>Total</i>	0.1	0.0	6.4	1,335.8	63.4	74.5
<i>Employment Only</i>	0.1	0.0	6.4	422.6	12.0	7.6
<i>Residential Permitted</i>	0.0	0.0	0.0	913.2	51.5	66.9
<i>Zoning = ELAC</i>	0.0	0.0	6.3	438.7	35.1	10.4
<i>Employment Only</i>	0.0	0.0	6.3	406.3	12.0	7.6
<i>Residential Permitted</i>	0.0	0.0	0.0	32.5	23.1	2.8
<i>Zoning ≠ ELAC</i>	0.1	0.0	0.1	897.1	28.4	64.1
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	0.0	0.0	3.8	20.7	19.4	2.7
<i>Employment Only</i>	0.0	0.0	3.8	4.5	12.0	0.0
<i>Residential Permitted</i>	0.0	0.0	0.0	16.2	7.4	2.7
VACANT (ha)						
<i>Total</i>	0.3	0.0	0.0	3,900.4	2,911.4	0.0
<i>Currently Serviced</i>	0.0	0.0	0.0	92.6	0.0	0.0
<i>Planned Serviced</i>	0.0	0.0	0.0	92.6	0.0	0.0
<i>Has Frequent Transit</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Planned Transit</i>	0.0	0.0	0.0	0.0	0.0	0.0
<i>Not Otherwise Constrained</i>	0.3	0.0	0.0	14.7	1.1	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	5	45	-	5	25	-
<i>Medium Scenario</i>	5	50	-	5	25	-
<i>High Scenario</i>	5	70	5	5	45	-
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	0.1	1.0	0.0	29.9	2.6	0.0
<i>Medium Scenario</i>	0.1	1.1	0.0	29.9	2.6	0.0
<i>High Scenario</i>	0.1	1.5	0.2	29.9	4.8	0.0
<i>Lowest Vacant Gap</i>	0.3	(1.0)	0.0	3,870.5	2,908.8	3,877.0
<i>Lowest Serviced Gap</i>	(0.1)	(1.0)	0.0	62.6	(2.6)	0.0
<i>Highest Vacant Gap</i>	0.3	(1.5)	(0.2)	3,870.5	2,906.7	3,877.0
<i>Highest Serviced Gap</i>	(0.1)	(1.5)	(0.2)	62.6	(4.8)	0.0

*number units in hectares (ha)

**numbers may not sum due to rounding

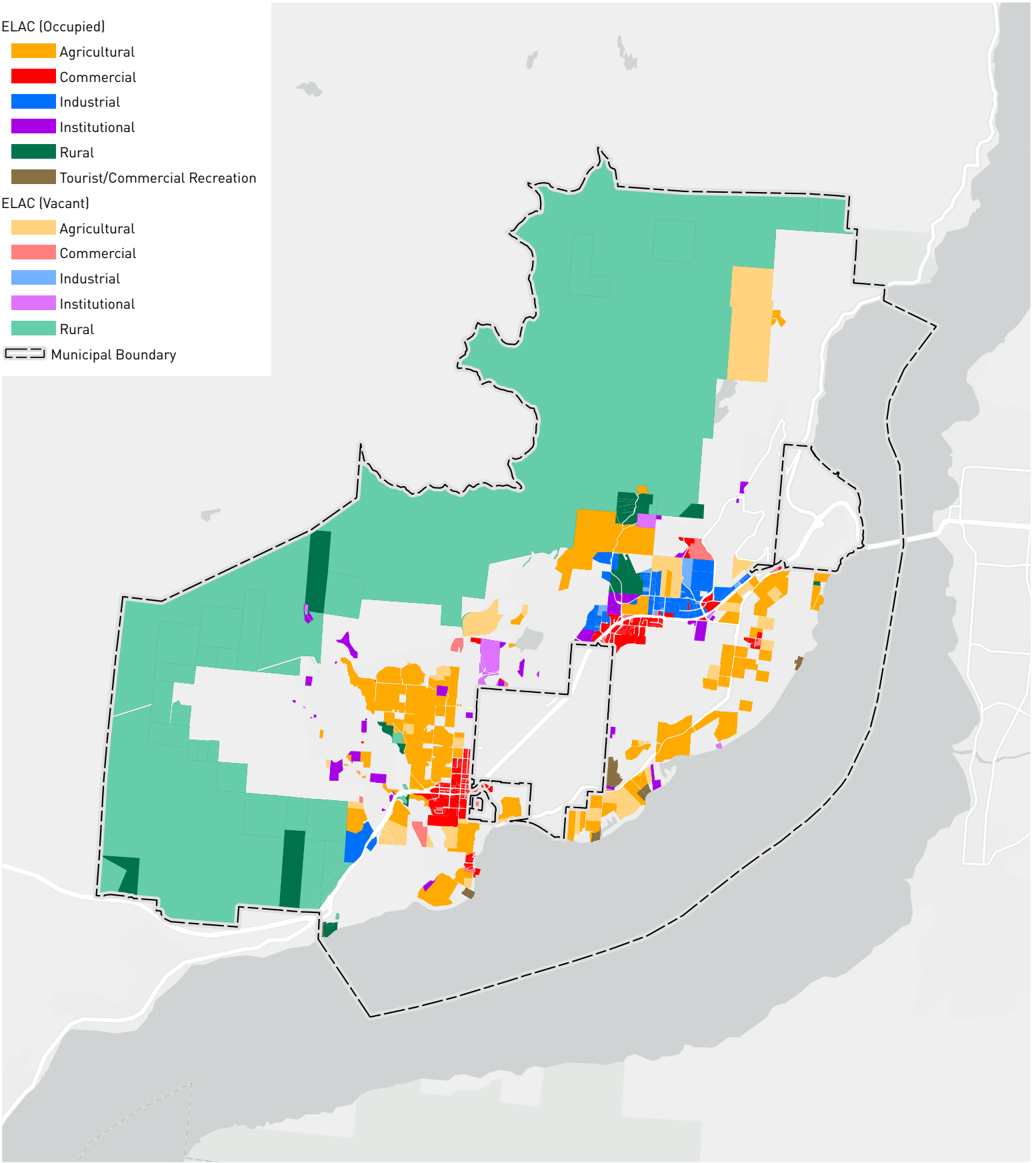
ELAC (Occupied)

- Agricultural
- Commercial
- Industrial
- Institutional
- Rural
- Tourist/Commercial Recreation

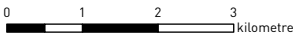
ELAC (Vacant)

- Agricultural
- Commercial
- Industrial
- Institutional
- Rural

Municipal Boundary



1:100,000



Employment Land Inventory

Employment Land Classes: West Kelowna

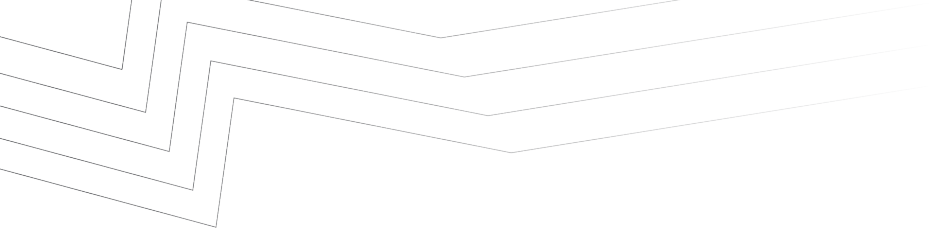
Regional District of Central Okanagan



WEST KELOWNA	Commercial	Industrial	Institutional	Agricultural	TCR	Other Rural
SUMMARY (ha)						
<i>Total</i>	186.7	165.7	131.8	1,207.3	29.1	6,222.7
<i>Employment Only</i>	10.2	165.7	131.8	161.0	29.1	6,222.7
<i>Residential Permitted</i>	176.5	0.0	0.0	1,046.3	0.0	0.0
DETAILED (ha)						
<i>OCP Future Land Use</i>	186.7	165.7	131.8	1,207.3	29.1	6,222.7
<i>Zoned</i>	53.0	212.2	121.7	0.0	7.2	0.0
<i>Zoning Matches OCP</i>	53.0	153.6	78.8	1,177.7	6.3	0.0
<i>Zoning Different from OCP</i>	133.7	12.1	53.0	29.5	22.8	6,222.7
OCCUPIED (ha)						
<i>Total</i>	145.8	148.0	119.2	811.9	29.1	256.5
<i>Employment Only</i>	9.7	148.0	119.2	108.9	29.1	256.5
<i>Residential Permitted</i>	136.0	0.0	0.0	703.0	0.0	0.0
<i>Zoning = ELAC</i>	46.6	135.9	76.7	809.7	6.3	0.0
<i>Employment Only</i>	9.7	135.9	76.7	108.9	6.3	0.0
<i>Residential Permitted</i>	36.8	0.0	0.0	700.8	0.0	0.0
<i>Zoning ≠ ELAC</i>	99.2	12.1	42.5	2.2	22.8	256.5
OCCUPIED SOFT SITES (ha)						
<i>Total</i>	15.3	48.6	12.6	134.4	2.2	0.0
<i>Employment Only</i>	3.5	48.6	12.6	40.8	2.2	0.0
<i>Residential Permitted</i>	11.7	0.0	0.0	93.6	0.0	0.0
VACANT (ha)						
<i>Total</i>	40.9	17.6	12.6	395.4	0.0	5,966.2
<i>Currently Serviced</i>	40.9	17.6	11.8	202.4	0.0	4,132.4
<i>Planned Serviced</i>	40.9	17.6	11.8	202.4	0.0	4,132.4
<i>Has Frequent Transit</i>	6.3	0.4	0.7	6.8	0.0	0.0
<i>Planned Transit</i>	12.8	5.1	1.2	109.7	0.0	1,012.9
<i>Not Otherwise Constrained</i>	5.3	5.7	0.9	167.5	0.0	0.0
PROJECTED EMPLOYMENT CHANGE (2023-2046) (jobs)						
<i>Low Scenario</i>	1,540	1,365	870	165	95	25
<i>Medium Scenario</i>	1,440	1,440	845	165	85	25
<i>High Scenario</i>	1,830	1,855	1,000	165	110	25
PROJECTED DEMAND AND SUPPLY SURPLUS AND DEFICIT (2023-2046) (ha)						
<i>Low Scenario</i>	20.5	30.0	39.1	987.6	10.1	18.9
<i>Medium Scenario</i>	19.1	31.7	38.0	987.6	9.0	18.9
<i>High Scenario</i>	24.3	40.8	44.9	987.6	11.6	18.9
<i>Lowest Vacant Gap</i>	21.7	(12.4)	(25.4)	16,331.9	(9.0)	5,947.3
<i>Lowest Serviced Gap</i>	21.7	(12.4)	(26.1)	(785.2)	(9.0)	4,113.6
<i>Highest Vacant Gap</i>	16.5	(23.1)	(32.3)	(592.2)	(11.6)	5,947.3
<i>Highest Serviced Gap</i>	16.5	(23.1)	(33.1)	(785.2)	(11.6)	4,113.6

*number units in hectares (ha)

**numbers may not sum due to rounding



APPENDIX B – EMPLOYMENT LANDS INVENTORY SORTING

OCP FUTURE LAND USE DESIGNATIONS

*Permitted uses are only provided in the following tables if they have been explicitly listed in the respective planning documents.

** Where residential permissions are permitted as standalone or primary use, which limits the economic potential of the land, the residential permitted field has been designated as "Y".

Regional District of Central Okanagan Electoral Areas - East (RDCO East)				
Ellison Official Community Plan Bylaw No. 1124, 2006				
OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agriculture (AGR)	Lands within this designation will support crop growing, food processing, agri-tourism and other industries in support of the agricultural sector.		AGR	N
Rural 2 Hectare (RUR-2)	This is a transitional area, within the ALR and supported by the Agricultural Land Commission, consisting of a 2-hectare minimum lot size.		AGR	Y
Rural 4 Hectare (RUR-4)	Lands within this designation are large rural properties with minimal services and some limitations consisting of a 4-hectare minimum lot size.		AGR	Y
Rural 30 Hectare (RUR-30)	Lands within this designation are large rural properties with minimal services and some limitations consisting of a 30-hectare minimum lot size.		AGR	Y
Rural Resource (RUR_RSC)	Crown Lands within this designation will support resource industries such as cattle range, timber harvest and gravel extraction as well as outdoor recreation on large parcels		RUR	N
Community Facilities (INST)	This designation is intended for a variety of public and private institutional and community services including schools, churches, community halls, fire halls, medical centres, and includes community landfill, transfer station and sewage treatment operations		INST	N
Private Recreation (PR-REC)	This designation is intended for outdoor oriented parks, open space oriented, private recreation such as golf courses		TCR	N

Joe Rich Rural Area Land Use Bylaw No. 1195, 2007				
Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
Large Holdings (LH)		Residential; Agriculture; Portable Saw Mill and Shake Mill; Service Kennels, Veterinaries and Animal Hospitals (100m from property line); Hobby Kennels accessory to residential use; Home Occupation; Bed and Breakfast; Agri Tourism; Agri Tourist Accommodation; Cannabis Production Facility	AGR	Y
Rural Acreage (RA, RAs)		Residential; Agriculture; Portable Saw Mill and Shake Mill; Service Kennels, Veterinaries and Animal Hospitals (100m from property line); Hobby Kennels accessory to residential; Home Occupation; Bed and Breakfast; Agri Tourism; Agri Tourist Accommodation; Cannabis Production Facility	AGR	Y
Small Holdings 1 (SH-1)		Residential; Agriculture; Livestock keeping accessory to residential; Horticulture accessory to residential; Home Occupation; Bed & Breakfast; Agri Tourism; Agri Tourist Accommodation	AGR	Y
Small Holdings 2 (SH-2, SH-2s)		Residential; Hobby Kennels accessory to residential; Horticulture accessory to residential; Silviculture accessory to residential; Greenhouses accessory to residential; Plants and nurseries accessory to residential; Livestock Keeping accessory to residential; Agriculture; Bed & Breakfast; Home Occupation; Agri Tourism; Agri Tourist Accommodation	AGR	Y
Service Commercial (C-102)		Trailer and Mobile Home Storage; Outdoor Storage; Home Occupation; Retail agricultural markets, nurseries and garden shops; Auctions and used goods sales, discount and wholesale sales; Building and hardware sales and trade offices; Printers; Household and office equipment, repair, sales and service; Frozen food lockers, warehouses, lockers and storage facilities; Sign painting and fabricating; Taxi, bus and transport departments and office; Repairs of all forms of equipment; Veterinarians and animal hospitals; Bed & Breakfast	COMM	N
Institutional and Assembly (P-102)		Art galleries, museums, libraries, cultural and recreational facilities; Community and assembly halls and public buildings; Government offices, fire halls; Personal care homes; Clubs and lodges; Cemeteries and Crematoriums; Utility; Schools, Convents and Seminaries; Nurseries, Kindergartens and Day Care Centres; Churches; Residential	INST	N

Recreation Commercial (C-101)		Agriculture; Campground; Rifle range, fairground, outdoor recreation and sporting facility, clubhouse, sport and gift stand, eating establishment; Riding stables; Horse racing tracks, rodeo and gymkhana grounds; Residential	TCR	Y
Rural Tourist Commercial (RTC)	To allow a complementary mixture of agri-tourism and guest ranch accommodation uses in association with a working ranch.	Agriculture and open land recreational uses; Horse riding stadiums, arenas, boarding stables & petting zoo; A guest lodge with ancillary commercial activities; Swimming pool; Recreational cabins; Barbeque shelters; Unserviced shelter sites; Restaurant, Laundromat, curio shop and convenience store; Accessory buildings and structures	TCR	N
South Slopes Official Community Plan Bylaw No. 1304, 2012				
OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agriculture (AGR)	Lands within this designation are intended for agricultural use and will support crop growing, food processing, agritourism, and other industries in support of the agricultural sector.		AGR	N
Rural Resource (RUR_RSC)	Crown lands and private lands within this designation are intended to support resource industries such as cattle range, agriculture, timber harvest and gravel extraction as well as outdoor recreation on large parcels (30 ha or larger).		RUR	N
Institutional and Assembly (INST)	This designation is intended for community halls and public buildings such as clubs, lodges, churches, schools, nurseries, day care centres, cultural and recreational facilities.		INST	N

Regional District of Central Okanagan Electoral Areas - West (RDCO West)				
Brent Road / Trepanier Official Community Plan Bylaw No. 1303, 2012				
OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agriculture (AGR)	Lands within this designation are intended for agricultural use and will support crop growing, food processing, agri-tourism and other industries in support of the agricultural sector.		AGR	N
Rural Resource (RUR_RSC)	Crown lands and private lands within this designation are intended to support resource industries such as cattle range, agriculture, timber harvest and gravel extraction as well as outdoor recreation on large parcels (30 ha or larger).		RUR	N

Regional District of Central Okanagan Electoral Areas - West (RDCO West)				
Private Recreation (PRV_REC)	This designation is intended for large-scale, open space oriented, private recreation such as eco-tourism facilities or recreational cabins.		TCR	N
Rural Westside Official Community Plan Bylaw No. 1274, 2010				
OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agriculture (AGR)	Agriculture and large holdings and those larger parcels designated in the Zoning Bylaw as Rural Residential, RU1 and RU2, and having a minimum parcel size of 4 ha or greater, allow for compatible resource oriented uses such as forestry and farming.		AGR	N
Large Holding (LRG-HLD)	Larger parcels designated in the Zoning Bylaw as Rural Residential, RU1, RU2 and having a minimum parcel size of 4 ha or greater and allow for example compatible resource oriented uses such as forestry and farming.		AGR	Y
Rural Resource (RUR-RSC)			RUR	N
Commercial (COMM)	Local commercial areas, commercially zoned parcels include Business District C1, and Neighbourhood Commercial C2.		COMM	N
Institutional and Utility Services (INST)	Varying degrees of Community facilities and utility services, including schools, community centres, and health services.		INST	N
Commercial Resort (COMM-RSRT)	Resort developments and recreational resorts.		TCR	N
Crystal Mountain Resort (CRYS-RSRT)	A regional destination that is aesthetically appealing, environmentally aware and that is focused on family recreation, skiing and golfing in a peaceful, forested setting that is adjacent to a growing community within one of the most climatically favoured tourism regions in British Columbia.		TCR	Y

City of Kelowna

Kelowna 2040 – Official Community Plan Bylaw No. 12300, 2022

OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Rural – Agricultural and Resource (R-AGR)	Lands within the Rural – Agricultural and Resource designation will be supported for agricultural and resource uses, but will not be supported for urban development or for uses that could have a negative impact on agriculture.	Single dwelling housing; Secondary suites; Carriage houses; Low impact complementary uses; Agriculture; Resource extraction	AGR	N
Industrial (IND)	Industrial lands consist of a range of manufacturing, production, repair, processing, storage and distribution activities. Office space is discouraged but may be supported where ancillary to the primary industrial activities.	Industrial uses; Manufacturing; Repair; Processing; Storage; Distribution; Accessory retail; Accessory office	IND	N
Neighbourhood Commercial (NCOM)	Neighbourhood Commercial areas are envisioned to support small scale commercial development in Suburban Neighbourhoods and Rural lands to provide basic day to day services in closer proximity to those residents.	Retail Commercial; Apartment housing above the first floor	COMM	Y
Regional Commercial (RCOM)	Regional Commercial lands accommodate the large format retail and commercial uses that are expected to be more commonly accessed by car over the 20 year life of this plan.	Commercial; Retail; Tourist accommodation; Small scale office; Service commercial; Apartment housing	COMM	Y
Urban Centre (UC)	Urban Centres are the City's largest activity hubs. They are characterized by the largest concentration of commercial and employment uses in the city, arts and cultural services, a mix of high density residential development, and a high quality public realm.	Commercial; Office; Retail; Visitor Accommodation; Multi-unit residential; Apartment housing; Mixed-use development; Institutional	COMM	Y
Village Centre (VC)	Village Centres act as smaller hubs of activity in the city serving their immediate surroundings, providing basic day-to-day services within a short walking or biking trip.	Multi-unit residential; Apartment housing; Mixed use development; Commercial, including small scale office; Retail; Institutional; Tourist Accommodation	COMM	Y
Core Area – Health District (C-HTH)	The Health District supports the operations of Kelowna General Hospital campus and associated health care uses and integrates the campus with the surrounding neighbourhoods, recognizing their unique heritage character.	Institutional; Ground oriented multi-unit residential; Small-scale commercial; Apartment housing	INST	Y

City of Kelowna				
Educational / Institutional (EDINST)	The Educational / Institutional designation signals where key educational, cultural, government and religious activities take place. The designation is characterized by schools, hospitals, places of worship, recreation centres and other facilities that provide public services delivered by governments or not-for-profit institutions.	Schools; Post secondary institutions; Government offices and services; Not-for-profit offices and services; Health services; Cultural and recreation facilities; Places of worship; Shelters and supportive housing	INST	N
Public Service Utility (PSU)	Utility and transportation infrastructure is required to provide Kelowna residents, visitors and businesses with a high quality of life, economic growth and improved health and safety outcomes.	Utility and communication infrastructure; Airport and aviation uses; Transportation infrastructure; Landfill operations; Renewable energy infrastructure	IND	N
Private Recreational (REC)	Privately owned properties that complement the publicly owned parks by offering specific outdoor recreational activities. Includes golf courses, driving ranges, and similar activities operating as commercial ventures or clubs.	Recreation and cultural services; Limited retail commercial to support recreational uses	COMM	N

City of West Kelowna				
Official Community Plan No. 300				
OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agriculture (AG)	This designation encourages diverse, prosperous, and adaptable agricultural uses to support a productive agricultural hub in the City.	Agricultural uses; Residential (principal and secondary farm dwellings); Ancillary agricultural retail for on-farm grown and/or produced goods	AGR	Y
Resource Land (RL)	To designate lands for resource extraction, forestry and agriculture, with interim or post-extraction use as parks and open space.	Natural resource extraction and forestry; Recreation; Agricultural uses; Parks and open space	RUR	N
Business Park (BP)	To allow a diversity of employment uses with potential impacts more appropriate to a Business Park context such as equipment sales, light production/manufacturing, offices, show rooms, and warehousing/storage.	Commercial/Retail/Research/Technology/Biotechnology appropriate to Business Park or where supporting adjacent Industrial uses; Limited ancillary Commercial (convenience retail and restaurants), serving the needs of local employees where appropriate; Secondary uses may include limited light industrial; Ancillary caretaker units	IND	N

City of West Kelowna

Industrial (IND)	To maintain and reinforce industrial lands to allow for a variety of primary industrial uses including aerospace, aggregate processing, agricultural supply, distribution, general and/or heavy industry, manufacturing, research and technology, warehousing/storage, and directly related services in low-rise buildings.	Industrial (focus on primary use); Ancillary commercial; Ancillary office; Ancillary retail; Ancillary caretaker units	IND	N
Commercial (C)	To allow for a variety of commercial and mixed-use including retail/services, office, and residential in low- and mid-rise forms.	Commercial; Office; Retail; Services; Mixed-use buildings; Institutional; Live-work units (grade related)	COMM	Y
Westbank Urban Centre – Mixed Use Corridor (Area A) (WUC-MUC)	To promote a high-density downtown core with a mix of residential, commercial/retail and office uses, with integrated open space and public amenities.	Mixed-use buildings; Institutional; Ancillary housing initiatives; Live-work units	COMM	Y
Westbank Urban Centre – Commercial Core (Area B) (WUC-CC)	To promote a high-density district with a high concentration of commercial and office uses, while allowing for some mixed-use residential and public and private amenities.	Commercial; Office; Retail; Mixed-use buildings; Institutional; Ancillary housing initiatives; Live-work units	COMM	Y
Boucherie Urban Centre (BUC)	To promote a second urban centre that focuses on a mix of residential, commercial/retail, and office uses, while providing generous open space and public amenities.	Mixed-use buildings; Commercial; Office; Retail; Multi-unit housing; Townhouses; Institutional; Ancillary housing initiatives; Live-work units	COMM	Y
Goats Peak Neighbourhood Centre (GPNC)	To promote smaller centres in various neighbourhoods in West Kelowna, allowing for diverse types of housing, retail/services, and some office uses, as well as open space amenities.	Small-scale commercial uses; Institutional and ancillary housing initiatives; Mixed-use buildings; Multi-unit housing; Townhouses; Live-work units (grade-related)	COMM	Y
Gellatly Neighbourhood Centre (GNC)	To promote smaller centres in various neighbourhoods in West Kelowna, allowing for diverse types of housing, retail/services, and some office uses, as well as open space amenities.	Small-scale commercial uses; Institutional and ancillary housing initiatives; Mixed-use buildings; Multi-unit housing; Townhouses; Live-work units (grade-related)	COMM	Y
Lakeview Heights Neighbourhood Centre (LHNC)	To promote smaller centres in various neighbourhoods in West Kelowna, allowing for diverse types of housing, retail/services, and some office uses, as well as open space amenities.	Small-scale commercial uses; Institutional and ancillary housing initiatives; Mixed-use buildings; Multi-unit housing; Townhouses; Live-work units (grade-related)	COMM	Y
Rose Valley Neighbourhood Centre (RVNC)	To promote smaller centres in various neighbourhoods in West Kelowna, allowing for diverse types of housing, retail/services, and some office uses, as well as open space amenities.	Small-scale commercial uses; Institutional and ancillary housing initiatives; Mixed-use buildings; Multi-unit housing; Townhouses; Live-work units (grade-related)	COMM	Y

City of West Kelowna

Smith Creek and Shannon Lake Neighbourhood Centre (SSNC)	To promote smaller centres in various neighbourhoods in West Kelowna, allowing for diverse types of housing, retail/services, and some office uses, as well as open space amenities.	Small-scale commercial uses; Institutional and ancillary housing initiatives; Mixed-use buildings; Multi-unit housing; Townhouses; Live-work units (grade-related)	COMM	Y
Institutional (INS)	To provide suitable areas for schools, government buildings and other institutions in buildings ranging from low to mid-rise heights. May include ancillary social housing, where appropriate.	Institutional; Educational; Ancillary housing initiatives; Parks and open space; Related recreational uses	INST	N
Tourist Commercial (TC)	To foster local economic development, provide a sense of place, and opportunities for public spaces and community and tourist accommodation, services and amenities.	Hotel and resort accommodation, services, and amenities, including commercial and residential uses associated with tourism.	TCR	N

Lake Country

Official Community Plan (2018-2038) Bylaw 1065, 2018

OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agricultural	Future uses could include the farming of land, plants and animals; in addition to housing for legitimate agricultural help, agri-tourism operations, horse riding, training or boarding, agro-forestry, and other uses required for farm purposes.		AGR	N
Rural	Future uses could include minimal residential, agricultural, and resource extraction, provided minimal environmental and community impact is ensured.		RUR	N
Industrial	Industrially designated lands should be developed for future light industrial use. Future uses could include business parks, light manufacturing and other forms of clean industry.		IND	N
Highway Commercial	Subject to appropriate zoning, future uses for Highway Commercial sites could include service stations, convenience stores, motels or hotels and drive-through restaurants.		COMM	N
Mixed Use Commercial	Mixed Use Commercial developments include residential and commercial components and should be connected to full urban services.		COMM	Y

Lake Country				
Service Commercial	Service Commercial areas should focus on large-scale or vehicular oriented uses that are not suitable for the Town Centre or mixed-use areas. Future uses could include equipment rental businesses, building suppliers or warehouse sales operations.		COMM	N
Institutional	Some of the Institutional land uses that currently exist within Lake Country include educational and emergency services, several care facilities, government buildings, community amenities, public works, worship, and recreation facilities. These land uses attend to the health, safety, utility, educational needs, and spiritual wellbeing of the municipality.		INST	N
Tourist Commercial	Located on sites less than five hectares in size, future uses could include camping, tourist accommodation, retail and recreational uses. May also include multiple unit uses that are designed for short-term tourist purposes.		TCR	N

Peachland				
Official Community Plan (2018-2038) Bylaw 1065, 2018				
OCP Designation	OCP Description	Permitted Uses	Class	Residential Permitted
Agriculture (AGR)	To support the protection of ALR lands and land uses which are supportive and/or complimentary to agricultural use by reserving land designated as Agriculture for agriculture or related uses.		AGR	N
Industrial (IND)	For the location of clean industrial activity.		IND	N
Comprehensive Development (CD)	Relevant to areas previously subject to the Ponderosa-Pincushion and New Monaco Area Sector Plans that are not easily converted to existing land use designations.		COMM	Y
General Commercial (C)	Downtown commercial services are characterized by many small locally owned and operated businesses. Clement Neighbourhood has developed to offer service retail and highway commercial uses.		COMM	N

Peachland				
Mixed Use (MX)	Beach Avenue Neighbourhood, commercial uses that are complimentary to adjacent residential uses encouraged. Expected to be suitable for small locally owned and operated businesses.		COMM	Y
Institutional (INST)	Community services including school, firefighting, police protection, social, recreational and cultural opportunities.		INST	N
Tourism Commercial (TC)	Tourist Commercial uses and complimentary Medium Density Residential Uses		TCR	Y

Westbank First Nation				
Land Use Law No. 2007-01				
Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
Light Industrial (LI)		Custom workshop, trade or service; Light industry; Utility service facility; and accessory use, building or structure, including retail sales accessory to other uses in the LI designation	IND	N
Retail Commercial (RC)		Apartment housing – above street level; Entertainment or recreation establishment, indoor; General commercial establishment, not to exceed a maximum GFA of 4,650 square metres per tenancy; Hotel or motel; Office; Personal service establishment; Place of assembly; and Accessory use, building or structure	COMM	Y
Highway Commercial (HC)		Highway commercial use; Entertainment or recreation establishment, indoor; Personal service establishment; Hotel or motel; and Accessory use, building or structure	COMM	N
Waterfront Commercial (WC)		Entertainment or recreation establishment, indoor; Entertainment or recreation establishment, outdoor; Hotel or motel; Personal service establishment; Resort housing establishment; Waterfront commercial establishment, not to exceed a maximum GFA of 1,500 square metres per tenancy; and Accessory use, building or structure	COMM	N
Public Use & Institutional (INST)		Cemetery; Civic use; Group home, major; Place of assembly; and Accessory use, building or structure.	INST	N
Recreation Commercial (REC)		Entertainment or recreation establishment, indoor; Entertainment or recreation establishment, outdoor; and Accessory use, building or structure, including a dwelling unit for an owner/operator or caretaker, or a restaurant	TCR	N
Golf Course (GC)		Golf course or driving range; accessory use, building or structure, including a club house, retail store, restaurant, and dwelling unit for owner/operator or caretaker	TCR	N

Okanagan Indian Band

Phase 1 Land Use Plan, 2021

Land Use Plan Designation	Land Use Plan Description	Permitted Uses	Class	Residential Permitted
Agricultural			RUR	N
Resort Tourism			RUR	N
Industrial			IND	N
Commercial			COMM	N
Institutional			INST	N

ZONING BYLAW DESIGNATIONS

*Permitted uses are only provided in the following tables if they have been explicitly listed in the respective planning documents.

**Where residential permissions are permitted as standalone or primary use, which limits the economic potential of the land, the residential permitted field has been designated as "Y".

Regional District of Central Okanagan Electoral Areas – East and West				
Regional District of Central Okanagan Zoning Bylaw No. 871, Joe Rich Rural Area Land Use Bylaw No. 1195				
Zoning Designation	Zoning Description	Permitted Uses	Class	Residential Permitted
Agricultural (A1, A1s)	To accommodate agricultural operations and related activities located on parcels that are usually within the Agricultural Land Reserve.	Agriculture; Agri tourism; Agri tourist accommodation; Brewery, cidery, distillery, meadery, winery; Greenhouses; Home based business, standard; Home based business in Agricultural Zone; Kennels, Service & Hobby; Portable Saw Mill and Shake Mill; Accessory home; Retail sales of processed farm products; Temporary agricultural worker dwellings; Single detached house; Accessory buildings and structures; Bed & breakfast; Day care centre, minor; Temporary Agricultural Worker Dwelling; Cannabis production facility; Duplex housing; Secondary suite	AGR	N
Large Holdings (LH)		Residential; Agriculture; Portable Saw Mill and Shake Mill; Service Kennels, Veterinaries and Animal Hospitals (100m from property line); Hobby Kennels accessory to residential use; Home Occupation; Bed and Breakfast; Agri Tourism; Agri Tourist Accommodation; Cannabis Production Facility	AGR	N
Rural Acreage (RA)		Residential; Agriculture; Portable Saw Mill and Shake Mill; Service Kennels, Veterinaries and Animal Hospitals (100m from property line); Hobby Kennels accessory to residential; Home Occupation; Bed and Breakfast; Agri Tourism; Agri Tourist Accommodation; Cannabis Production Facility	AGR	N
Conservation Lands (CL8)	To manage lands and watercourses where protection and conservation of the natural environment is the principle objective and to permit passive recreational uses where appropriate.	Conservation area; Ecological reserve; Erosion or sediment control Interpretive centre; Forest or wilderness oriented recreation; Open space; Silviculture for forest health or fire hazard reduction; Water, fisheries and wildlife, biological diversity and culture heritage purposes; Accessory building or structures; Adventure eco-tourism	RUR	N

Regional District of Central Okanagan Electoral Areas – East and West

Forest Resource (F1)	To accommodate forest and resource management uses, on large parcels.	Timber production, utilization and related purposes; Forage production and grazing of livestock and wildlife; Forest or wilderness oriented recreation and wilderness purposes; Water, fisheries and wildlife, biological diversity and cultural heritage purposes; Dwelling unit; Accessory buildings and structures	RUR	N
Rural 1 (RU1)	To accommodate agricultural and rural uses on parcels that are 30 hectares or greater and located outside the Land Reserve.	Agriculture; Agri tourism; Agri tourist accommodation; Single detached house; Accessory home; Winery and cidery; Home based business, major; Bed & Breakfast accommodation; Portable saw mill and portable shake mill; Kennels, service; Kennels, hobby Veterinary clinic; Accessory buildings and structures; Greenhouses; Temporary agricultural worker dwellings; Day care centre, minor; Cannabis production facility; Secondary suite	RUR	N
Rural 2 (RU2, RU2s)	To accommodate rural residential, agricultural, home industry, and limited resource management uses on parcels of land that are 4 hectares or greater and located outside the Land Reserve.	Agriculture; Single detached house; Accessory home; Winery and cidery; Home based business; Bed & Breakfast; Portable saw mill and shake mill; Kennels, service & hobby; Veterinary clinic; Accessory buildings and structures; Greenhouses; Riding stables; Day care centre, minor; Temporary agricultural worker dwellings; Seasonal residential dwelling units; Dwelling units; Secondary suite	RUR	N
Rural 3 (RU3, RU3s)	To accommodate rural residential, limited agricultural, and limited home industry uses on parcels of land that are 1 hectare or greater and located outside the Land Reserve	Agriculture; Single detached house; Hobby kennel; Bed & Breakfast; Accessory buildings and structures; Greenhouses; Day care centre, minor; Home base business, major; Secondary Suite	RUR	N
Small Holdings (RU6, RU6s)	To accommodate single family residential, limited agricultural and limited home industry uses on parcels of land that are 2.0 hectares or greater and located outside the Land Reserve.	Agriculture; Single detached house; Hobby kennel; Home based business; Bed & Breakfast; Accessory building; Greenhouses; Riding stables; Day care centre, minor; Home based business, major; Secondary suite	RUR	Y
Small Holdings 1 (SH-1)		Residential; Agriculture; Livestock keeping accessory to residential; Horticulture accessory to residential; Home occupation; Bed & Breakfast; Agritourism; Agri Tourist Accommodation	RUR	Y
Small Holdings 2 (SH-2, SH-2s)		Residential; Hobby Kennels accessory to residential; Horticulture accessory to residential; Silviculture accessory to residential; Greenhouses accessory to residential; Plants and nurseries accessory to residential; Livestock Keeping accessory to residential; Agriculture; Bed & Breakfast; Home Occupation; Agri Tourism; Agri Tourist Accommodation	RUR	Y

Regional District of Central Okanagan Electoral Areas – East and West

Light Industrial (I1)	To accommodate light industrial activity.	Aircraft facilities; Auctioneering establishment; Automotive sales, rental, service and repair; Building and hardware sales and supply; Commercial card lock; Commercial school; Commercial storage; Contractor services; Discount and wholesale sales; Dwelling unit for owner/operator; Emergency and protective services; Equipment sales, rental and repair; Freight and distribution outlets; Greenhouses and plant nurseries; Heavy equipment sales, rental and repair; High technology industry; Home and business support services; Kennels; Manufacturing; Meat and produce processing, packing and canning; Micro brewery; Office; Outdoor storage yards; Personal service establishments; Recreation services, indoor; Recreational vehicle and marine sales; Restaurants; Retail sales accessory to manufacturing; Utility service; Veterinary clinic; Warehousing; Accessory buildings	IND	N
Timber Processing and Manufacturing (I3)	To accommodate the use of land, buildings, and structures for forest related activities.	Dryland sort; Timber processing; Re-manufacturing of wood products; Retail sales and office uses accessory to other uses in the I3 zone; Dwelling unit for owner/operator; Accessory buildings	IND	N
Gravel Extraction (I4)	To accommodate the processing of natural sand and gravel resources for the manufacture, wholesale, and retail sale of associated products.	Sand and gravel quarrying, extraction, etc.; Manufacture, wholesale, retail; Retail sales and offices uses accessory; Dwelling unit for owner/operator; Accessory buildings	IND	N
Neighbourhood Commercial (C2)	To accommodate for a mix of small retail, service, institutional and some residential uses intended for neighbourhood areas.	Apartment housing above street level storey; Day care centre, major and minor; Restaurant; Emergency and protective services; Financial institutions; Health services facility; Household repair services; Office; Personal service establishments; Postal and courier services; Retail stores, convenience; Video store; Accessory buildings	COMM	Y
Gasoline Service Station (C3)	To accommodate gasoline service stations with some associated uses.	Gasoline service station; Restaurants; Accessory buildings and structures	COMM	N
Recreation Commercial (C6)	To accommodate indoor and outdoor recreation commercial oriented uses.	Amusement centres; Amusement establishments, outdoor; Clubs; Drive-in theatres; Dwelling unit; Golf courses; Gold driving ranges; Horse racing tracks; Libraries, museums and art galleries; Marinas; Recreation services, indoor and outdoor; Restaurants; Retail stores, general; Riding stables; Rodeo and gymkhana grounds; Accessory buildings	COMM	Y
Recreation Commercial (C-101)		Agriculture; Campground; Rifle range, fairground, outdoor recreation and sporting facility, clubhouse, sport and gift stand, eating establishment; Riding stables; Horse racing tracks, rodeo and gymkhana grounds; Residential	TCR	N

Regional District of Central Okanagan Electoral Areas – East and West

Service Commercial (C-102)		Trailer and Mobile Home Storage; Outdoor Storage; Home Occupation; Retail agricultural markets, nurseries and garden shops; Auctions and used goods sales, discount and wholesale sales; Building and hardware sales and trade offices; Printers; Household and office equipment, repair, sales and service; Frozen food lockers, warehouses, lockers and storage facilities; Sign painting and fabricating; Taxi, bus and transport departments and office; Repairs of all forms of equipment; Veterinarians and animal hospitals; Bed & Breakfast	COMM	N
Institutional and Assembly (P2)	To accommodate administrative, institutional and service uses.	Clubs and lodges; Cemeteries; Community and assemble halls; Day care centre, major and minor; Emergency and protective services; Extended medical treatment facility; Group home, major; Education service facility; Libraries, museums and art galleries; Recreation services, indoor; Religious assembly facility; Restaurant; Temporary shelter services; Transportation station; Accessory buildings and structures; Religious or non-denominational camps; Recreation Services, Outdoor; Dormitory use and buildings where permitted	INST	N
Institutional and Assembly (P-102)		Art galleries, museums, libraries, cultural and recreational facilities; Community and assembly halls and public buildings; Government offices, fire halls; Personal care homes; Clubs and lodges; Cemeteries and Crematoriums; Utility; Schools, Convents and Seminaries; Nurseries, Kindergartens and Day Care Centres; Churches; Residential	INST	Y
Campground, Cabin and Motel Commercial (C5)	To accommodate commercial tourist accommodation in the form of campgrounds, small motels and small resorts with some associated uses.	Tourist cabins; Tourist campsites; Motels; Dwelling unit; Community and assembly halls; Restaurants; Retail stores, convenience; Marinas; Outdoor recreation equipment rental; Accessory buildings and structures	TCR	N
Comprehensive Development (Lake Okanagan Resort) - Resort Commercial & Recreation (CD-2 (A))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Golf Course; Hotel; Marina; Resort Clubhouse; Resort Office; Restaurant; Vehicular Parking Areas and Structures; Outdoor Boat Storage; Marine Fuel Facility; Accessory Building or Structure	TCR	N
Comprehensive Development (Lake Okanagan Resort) - Multiple Unit Resort & Residential 1 (CD-2 (B))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Apartment Housing; Hotel; Motel; Resort Apartments; Resort Townhomes; Townhome Housing; Accessory Building or Structure Home based business, minor	TCR	Y

Regional District of Central Okanagan Electoral Areas – East and West

Comprehensive Development (Lake Okanagan Resort) - Multiple Unit Resort & Residential 2 (CD-2 (C))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Apartment Housing; Resort Apartments; Accessory Building or structure; Home based business, minor	TCR	Y
Comprehensive Development (Lake Okanagan Resort) - Multiple Unit Resort 1 (CD-2 (E))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Hotel; Motel; Resort Apartments; Accessory building or structure	TCR	N
Comprehensive Development (Lake Okanagan Resort) - Multiple Unit Resort 2 (CD-2 (F))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Resort Apartments; Accessory buildings or structure	TCR	N
Comprehensive Development (Lake Okanagan Resort) - Resort Motel 1 (CD-2 (G))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Motel; Accessory building or structure	TCR	N
Comprehensive Development (Lake Okanagan Resort) - Resort Motel 2 (CD-2 (H))	The purpose of this zone is to provide for the comprehensive development of a residential and commercial resort community.	Motel; Accessory building or structure	TCR	N
Tourist and Resort Commercial (C7)	To accommodate commercial tourist accommodation in the form of large motels, hotels and large resorts.	Amusement establishments, outdoor; Automobile rental; Dwelling unit; Golf courses; Golf driving ranges; Hotel; Marinas; Motel; Outdoor recreation equipment rental; Personal service establishments; Recreation services, indoor; Recreation services, outdoor; Resort apartments; Resort townhomes; Restaurants; Retail stores, convenience; Riding stables; Tourist cabins; Tourist campsites; Accessory buildings	TCR	Y
Wilderness Resort Commercial (C8)	To accommodate wilderness oriented tourist accommodation with associated uses.	Guiding and outfitting establishments; Tourist cabins; Tourist campsites; Tourist lodges; Dwelling unit; Motel; Community and assembly halls; Marinas; Mini golf; Outdoor recreation equipment rental; Restaurants; Retail stores, convenience; Riding stables; Accessory buildings	TCR	Y
Rural Tourist Commercial (RTC)	To allow a complementary mixture of agri-tourism and guest ranch accommodation uses in association with a working ranch.	Agriculture and open land recreational uses; Horse riding stadiums, arenas, boarding stables & petting zoo; A guest lodge with ancillary commercial activities; Swimming pool; Recreational cabins; Barbeque shelters; Unserviced shelter sites; Restaurant, Laundromat, curio shop and convenience store; Accessory buildings and structures	TCR	N

City of Kelowna

City of Kelowna Zoning Bylaw No. 12375

Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
Agriculture (A1)	The purpose is to provide a zone for Agricultural Land Reserve parcels that permit agricultural uses and other complementary uses suitable in an agricultural setting.	Accessory buildings or structures; Agriculture; Agriculture, urban; Agriculture, intensive; Agri-tourism; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Aquaculture; Bed and breakfast homes; Cannabis cultivation; Carriage house; Child care centre, minor; Farm retail sales stands; Forestry; Greenhouses and plant nurseries; Home-based business, minor; Home-based business, major; Home-based business, rural; Kennels; Mobile home; On-farm processing of cannabis; On-farm processing; Secondary suite; Single detached dwelling; Stables; Temporary farm worker housing	AGR	N
Agriculture / Rural Residential (A2)	The purpose is to provide a zone that allows for rural residential and agricultural land uses outside the Agricultural Land Reserve.	Accessory buildings or structures; Agriculture; Agriculture, urban; Agri-tourism; Animal clinics, major; Animal clinics, minor; Aquaculture; Bed and breakfast homes; Carriage house; Child care centre, minor; Greenhouses and plant nurseries; Group home; Home-based business, major; Home-based business, minor; Home-based business, rural; Kennels; Secondary suite; Single detached dwelling; Stables; Temporary Farm Worker Housing	RUR	N
Business Industrial (I1)	The purpose is to provide a zone for developments of planned industrial business parks containing indoor industrial uses with limited outdoor storage and to provide a zone for transition from general / heavy industrial uses to other uses.	Accessory buildings or structures; Agriculture, urban; alcohol production facility; Animal clinics, major; Animal clinics, minor; Boat storage; Cannabis production facilities; Child care centre, major; Commercial storage; Cultural and recreation services; Emergency and protective services; Food primary establishment; General industrial use; liquor primary establishment; Participant recreation services, indoor; Recycling drop-offs; Residential security/operator unit; Retail cannabis sales; Warehousing	IND	N

City of Kelowna				
General Industrial (I2)	The purpose is to provide for general industrial uses.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Auctioneering Establishments; Automotive & Equipment; Automotive & Equipment, Industrial; Boat storage; Bulk fuel depot; Cannabis production facilities; Commercial storage; Emergency and protective services; Fleet services; Food primary establishment; Gas bar; General industrial use; liquor primary establishment; Non-accessory parking; Outdoor storage; Participant recreation services, indoor; Recycling depots, drop-offs; Residential security/operator unit; Retail cannabis sales; Temporary shelter services; Warehousing	IND	N
Heavy Industrial (I3)	The purpose is to designate and preserve land for developments of industrial uses which, due to appearance, noise, odour, emission of toxic wastes, or fire or explosive hazards may have detrimental effects on other zones.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Automotive & Equipment, Industrial; Bulk fuel depot; Cannabis production facilities; Concrete and Asphalt Plants; General industrial use; Outdoor storage; Recycling depots, drop-offs; Recycling plants; Residential security/operator unit; Utility Services, Infrastructure; Wrecking Yards	IND	N
Natural Resource Extraction (I4)	The purpose of this zone to provide a zone used for natural resource extraction such as gravel extraction and processing.	Accessory buildings or structures; Agriculture, urban; Concrete and Asphalt Plants; Natural resource extraction; Offices; Outdoor Storage; Recycling Plants; Residential Security/Operator Unit; Utility services, infrastructure	IND	N
Comprehensive Development – Airport (CD12)	The purpose is to provide a zone for the orderly operation of an airport and the development of properties surrounding the airport.	Accessory buildings or structures; Agriculture, urban; Aircraft sales/rentals; Airports; Animal Clinics, minor; Automotive and equipment; Bulk Fuel Depot; Child care centre, major; Commercial storage; Education services; Exhibition and convention facilities; Fleet services; Food primary establishment; Gas bars; General Industrial use; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices; Outdoor storage; Professional services; Retail	IND	N
Utilities (P4)	The purpose is to provide a zone for private and public utilities.	Accessory buildings or structures; Agriculture, urban; Emergency and protective services; Outdoor storage; Participant recreation services, outdoor; Utility services, infrastructure	IND	N

City of Kelowna				
Local & Neighbourhood Commercial (C1)	The purpose is to provide a zone for the commercial developments outside the Core Area to provide a range of services needed on a day-to-day basis by residents within their neighbourhoods. Generally, building scale includes 2 storey structures with primary commercial accessed at ground level. Residential can be considered on second floors above commercial services.	Accessory buildings or structures; Agriculture, urban; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Emergency and protective services; Food primary establishment; Gas bar; Greenhouses and plant nurseries; Health services; Liquor primary establishment; Offices; Participant recreation services, indoor; Personal service establishment; Professional services; Recycling drop-offs; Religious assemblies; Residential security/operator unit; Retail; Retail Cannabis Sales	COMM	Y
Vehicle Oriented Commercial (C2)	The purpose is to provide a commercial zone used to accommodate a mix of vehicle oriented commercial land uses along corridor routes and highways. Building scale generally includes two storey buildings with potential for office related uses on upper floors.	Accessory buildings or structures; Agriculture, urban; Alcohol Production Facility; Animal Clinics, major; Animal clinics, minor; Apartment housing; Auctioneering establishments; Automotive & equipment; Child care centre, major; Child care centre, minor; Commercial storage; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Fleet services; Food primary establishment; Gas bar; Greenhouses and plant nurseries; Health services; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices; Participant recreation services, indoor; Personal service establishment; Professional services; Recycling drop-offs; Religious assemblies; Residential security/operator unit; Retail; Retail Cannabis Sales; Temporary shelter services; Warehousing	COMM	Y
Core Area Mixed Use (CA1)	The purpose is to provide a mixed commercial and residential zone for developments within the Core Area and outside urban centres. Buildings up to 4 storeys will be generally permissible with Buildings up to 6 storeys in certain circumstances based on development policy guidance from the OCP. A further increase to 12 storeys will be acceptable on key Transit Supportive Corridors and within close proximity to transit and Urban Centres.	Accessory buildings or structures; Agriculture, urban; Alcohol Production Facility; Animal Clinics, major; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Food primary establishment; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices; Parks; Participant recreation services, indoor; Personal service establishment; Professional services; Recycling drop-offs; Religious assemblies; Retail; Retail Cannabis Sales; Temporary shelter services; Warehousing	COMM	Y

City of Kelowna				
Village Centre (VC1)	The purpose is to provide a zone with an integrated design for a comprehensive mixed-use area which can include a variety of uses as specified for each Village Centre (as identified with the OCP).	Accessory buildings or structures; Agriculture, urban; Alcohol Production Facility; Animal Clinics, major; Animal clinics, minor; Apartment housing; Boat storage; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Food primary establishment; Gas bar; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices; Parks; Participant recreation services, outdoor; Participant recreation services, indoor; Personal service establishment; Professional services; Recycling drop-offs; Religious assemblies; Retail; Retail Cannabis Sales; Temporary shelter services; Townhouses	COMM	Y
Comprehensive Development - High Density Mixed Use Commercial (CD17)	The purpose is to provide a zone for existing large scale mixed-use commercial/residential developments in the Core Area but outside Urban Centres. This zone is intended to capture lots that have already been constructed prior to the adoption of this bylaw in which the densities and scale of development is generally beyond those recommended by policies outlined in the 2040 OCP.	Accessory buildings or structures; Agriculture, urban; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Education services; Food primary establishment; Health services; Home-Based business, minor; Hotels/motels; Liquor primary establishment; Non-Accessory parking; Offices; Participant recreation services, indoor; Personal service establishments; Professional services; Retail; Stacked townhouses; Townhouses	COMM	Y
Comprehensive Development - Capri Centre (CD26)	The purpose is to provide the framework for the existing uses and for the re - development and use of the Capri Centre in stages, over time, with a mixture of commercial and residential uses that serve more than one neighbourhood.	Accessory buildings or structures; Agriculture, urban; Apartment housing; Animal clinics, minor; Boarding or Lodging houses; Child care centre, major; Cultural and recreation services; Education services; Emergency and protective services; Food primary establishment; Gas bars; Health services; Home based business, minor; Hotels; Liquor primary establishments; Offices; Participant recreation services, indoor; Personal service establishments; Professional services; Religious assemblies; Recycling drop-offs; Retail; Spectator sports establishments; Stacked townhouses; Temporary shelter services; Townhouses	COMM	Y

City of Kelowna				
Downtown Urban Centre (UC1)	The purpose of this zone is to designate and to preserve land for developments of the financial, retail and entertainment, governmental, cultural and civic core of the downtown while also encouraging high density mixed-use buildings.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Exhibition and convention facilities; Food primary establishment; Gaming facilities; Gas bar; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices	COMM	Y
Capri-Landmark Urban Centre (UC2)	The purpose is to provide a mixed commercial and residential zone for developments within the Capri-Landmark Urban Centre that is consistent with and follows the Capri-Landmark Urban Centre Plan.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Exhibition and convention facilities; Food primary establishment; Gaming facilities; Gas bar; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices	COMM	Y
Midtown Urban Centre (UC3)	The purpose is to provide a mixed commercial and residential zone for developments within the Midtown Urban Centre.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Exhibition and convention facilities; Food primary establishment; Gas bar; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices	COMM	Y

City of Kelowna				
Rutland Urban Centre (UC4)	The purpose is to provide a mixed commercial and residential zone for developments within the Rutland Urban Centre.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Exhibition and convention facilities; Food primary establishment; Gas bar; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices	COMM	Y
Pandosy Urban Centre (UC5)	The purpose is to provide a mixed commercial and residential zone for developments within the Pandosy Urban Centre.	Accessory buildings or structures; Agriculture, urban; Alcohol production facility; Animal clinics, major; Animal clinics, minor; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Drive throughs; Education services; Emergency and protective services; Exhibition and convention facilities; Food primary establishment; Gas bar; Health services; Home-based business, major; Home-based business, minor; Hotels/motels; Liquor primary establishment; Non-accessory parking; Offices	COMM	Y
Apartment Housing (MF3)	The purpose is to provide a zone primarily for apartments ranging up to 6 storeys on serviced urban lots with various commercial uses permitted on transit supportive corridors	Accessory buildings or structures; Agriculture, urban; Apartment housing; Child care centre, major; Child care centre, minor; Cultural and recreation services; Food primary establishment; Health services; Home-based business, major; Home-based business, minor; Professional services Participant recreation services, indoor; Personal services establishments; Retail; Stacked townhouses; Townhouses	COMM	Y
Comprehensive Development – University (CD20)	The purpose of this zone is to allow the full range of academic, research and miscellaneous supporting land-uses essential to a leading-edge university program or campus.	Any university related services; Agriculture, urban; Apartment housing; Child care centre, major; Cultural and recreation services; Education services; Emergency and protective services; Food primary establishments; General industrial use; Greenhouses and plant nurseries; Health services; Hotels/Motels; Liquor primary establishment; Non-accessory parking; Offices; Parks; Participant recreation services, indoor; Participant recreation services, outdoor; Personal service establishments; Professional services; Recycling drop-offs; Religious assemblies; Retail; Stacked townhouses; Townhouses	INST	Y

City of Kelowna				
Major Institutional (P1)	The purpose is to provide a zone primarily for major governmental and publicly or privately funded institutional uses.	Accessory buildings or structures; Agriculture, urban; Apartment housing; Child care centre, major; Cultural and recreation services; Detention and correction services; Emergency and protective services; Exhibition and convention facilities; Food primary establishment; Health services; Liquor primary establishment; Non-accessory parking; Parks; Participant recreation services, indoor; Recycling drop-offs; Religious assemblies; Retail; Spectator sports establishments; Temporary shelter services	INST	N
Education and Minor Institutional (P2)	The purpose is to provide a zone for private and public educational, residential, and recreational uses and religious assemblies.	Accessory buildings or structures; Agriculture, urban; Apartment housing; Child care centre, major; Cultural and recreation services; Education services; Emergency and protective services; Food primary establishment; Health services; Parks; Participant recreation services, indoor; Participant recreation services, outdoor; Recycling drop-offs; Religious assemblies; Residential security/operator unit; Retail; Temporary shelter services	INST	Y
Kelowna General Hospital (HD1)	To provide a zone for the comprehensive development of buildings that provide health services associated with the Kelowna General Hospital, Interior Health Authority, and the University of British Columbia Clinical Academic Campus. This zone will provide for a range of institutional uses, as well as a limited amount of hospital-related supportive commercial uses.	Accessory buildings or structures; Agriculture, urban; Child care centre, major; Education services; Emergency and protective services; Food primary establishment; Hospitals; Participant recreation services; Retail	INST	N

City of West Kelowna

City of West Kelowna Zoning Bylaw No. 0265, 2022

Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
Agricultural (A1)	To accommodate agricultural operations and related activities located on parcels that are typically within the Agricultural Land Reserve.	Agriculture, general; Agriculture, intensive; Alcohol production facility; Cannabis production facility in ALR only; Kennels, service on parcels 4 ha or greater; Greenhouse or plant nursery; Mobile home; Modular home; Riding stable; Single detached dwelling; Accessory uses, buildings and structures; Agricultural worker dwelling; Agricultural worker dwelling, temporary; Agri-tourism; Agri-tourism accommodation; Care facility, minor; Carriage house (may be subject to ALC regulations); Home based business, major; Kennels, hobby; Portable saw mill or shake mill; Retail sales of farm products or processed farm products; Secondary suite; Short-term rental/short-term rental (bed and breakfast)	AGR	N
Country Residential (RU1)	To accommodate rural, agricultural, and residential uses on parcels of land that are 0.5 ha or greater.	Agriculture, general; Agriculture, intensive in ALR only; Alcohol production facility in ALR only; Cannabis production facility in ALR only; Greenhouse or plant nursery; Modular home; Single detached dwelling; Accessory uses, buildings and structures; Care facility, minor; Carriage house (may be subject to ALC regulations); Home based business, major; Kennel, hobby; Retail sales of farm products or processed farm products; Secondary suite; Short-term rental/short-term rental (bed and breakfast)	AGR	Y
Rural Residential Small Parcel (RU2)	To accommodate rural, agricultural, and residential uses on parcels of land that are 1 ha or greater.	Agriculture, general; Agriculture, intensive in ALR only; Alcohol production facility in ALR only; Cannabis production facility in ALR only; Greenhouse or plant nursery; Modular home; Single detached dwelling; Accessory uses, buildings and structures; Agri-tourism; Agri-tourism accommodation; Care facility, minor; Carriage house (may be subject to ALC regulations); Home based business, major; Kennel, hobby; Secondary suite; Short-term rental/short-term rental (bed and breakfast); Retail sales of farm products or processed farm products	AGR	Y

City of West Kelowna

<p>Rural Residential Medium Parcel (RU3)</p>	<p>To accommodate rural, agricultural, and residential uses on parcels of land that are 2.0 ha or greater.</p>	<p>Agriculture, general; Agriculture, intensive in ALR only ; Alcohol production facility in ALR only; Cannabis production facility in ALR only; Greenhouse or plant nursery; Modular home; Riding stables; Single detached dwelling; Accessory uses, buildings and structures; Agricultural retail sales; Agri-tourism; Agri-tourism accommodation; Care facility, minor; Carriage house (may be subject to ALC regulations); Home based business, major; Kennel, hobby; Secondary suite; Short-term rental/short-term rental (bed and breakfast); Retail sales of farm products or processed farm products</p>	<p>AGR</p>	<p>Y</p>
<p>Rural Residential Large Parcel (RU4)</p>	<p>To accommodate rural, agricultural, and residential uses on parcels of land that are 4 ha or greater.</p>	<p>Agriculture, general; Agriculture, intensive; Alcohol production facility in ALR only; Cannabis production facility in ALR only; Greenhouse or plant nursery; Kennel, service on parcels larger than 4 ha; Modular home; Riding stable on parcels 2 ha or greater; Single detached dwelling; Veterinary clinic; Accessory uses, buildings and structures; Agricultural retail sales; Agricultural worker dwelling; Agri-tourism; Agri-tourism accommodation; Care facility, minor; Carriage house (may be subject to ALC regulations); Home based business, major; Kennel, hobby; Portable saw mill or portable shake mill on parcels 8 ha (19.8 ac) or greater; Secondary suite; Short-term rental/short-term rental (bed and breakfast); Retail sales of farm products or processed farm products</p>	<p>AGR</p>	<p>Y</p>
<p>Rural Resource (RU5)</p>	<p>To accommodate rural, agricultural and residential uses on parcels of land that are 30 ha or greater.</p>	<p>Agriculture, general; Agriculture, intensive; Alcohol production facility in ALR only; Cannabis production facility in ALR only; Greenhouse or plant nursery; Kennels, service on parcels larger than 4 ha; Modular home; Single detached dwelling; Riding stable on parcels 2 ha or greater; Veterinary clinic; Accessory uses, buildings and structures; Agricultural worker dwelling; Agricultural worker dwelling, temporary; Agri-tourism; Agri-tourism accommodation; Care facility, minor; Carriage house (may be subject to ALC regulations); Home based business, major; Kennel, hobby; Portable saw mill or portable shake mill on parcels 8 ha or greater; Secondary suite; Short-term rental/short-term rental (bed and breakfast); Retail sales of farm products or processed farm products</p>	<p>AGR</p>	<p>N</p>

City of West Kelowna

Light Industrial (11)	To accommodate light industrial uses and associated uses.	Auctioneering establishment; Alcohol Production Facility; Bulk fuel depot; Cannabis production facility; Commercial storage; Contractor service; Fire, police or ambulance service; Food bank; Freight or distribution outlet; Greenhouse or plant nursery; Heavy equipment sales, rental and repair; Heliport facility; High technology industry; Industry, general; Kennels; Office; Outdoor storage; Recreation services, indoor; Restaurant; Retail, service commercial; Utility service; Veterinary clinic; Warehouse	IND	N
Heavy Industrial (12)	To accommodate heavy industrial uses and associated uses.	Bulk fuel depot; Contactor services; Freight or distribution outlet; Heavy equipment sales, rental or repair; Heliport facility; Industry, heavy; Saw mill or planer mill; Salvage yard; Resource mining or extraction; Outdoor storage; Utility service; Accessory uses, buildings and structures; Caretaker unit; Home based business, minor; Storage of bulk fuel, chemicals or other petroleum products	IND	N
Timber Processing and Manufacturing (13)	To accommodate forestry related activities.	Contractor services; Dryland sort; Timber processing; Re-manufacturing of wood products; Saw mill or planer mill; Accessory uses, buildings and structures; Caretaker unit; Home based business, minor; Outdoor storage	IND	N
Gravel Extraction (14)	To accommodate extraction and processing of natural sand and gravel resources for the manufacture, wholesale, and retail sale of associated products.	Bulk fuel depot; Contactor services; Heavy equipment sales, rental and repair; Sand and gravel quarrying, extraction, crushing, sorting or screening; Manufacture, wholesale or retail of cement concrete or cement concrete aggregate products; Accessory uses, buildings and structures; Caretaker unit; Home based business, minor; Outdoor storage	IND	N
Gravel Extraction with Asphalt Plant (15)	To accommodate extraction and processing of natural sand and gravel resources for the manufacture, wholesale, and retail sale of associated products, including asphalt processing.	Asphalt plant; Bulk fuel depot; Contactor services; Heavy equipment sales, rental and repair; Sand and gravel quarrying, extraction, crushing, sorting or screening; Manufacture, wholesale or retail of concrete or concrete aggregate products; Accessory uses, buildings and structures; Caretaker unit; Home based business, minor; Outdoor storage	IND	N
Rural Industrial (16)	To accommodate rural-oriented industrial activities, agricultural uses and associated uses.	Agricultural market; Agriculture, general; Alcohol production facility; Machine shop; Single detached dwelling; Accessory uses, buildings and structures; Home based business, major; Outdoor storage; Retail, convenience; Carriage house; Secondary suite	IND	N

City of West Kelowna				
Urban Centre Commercial (C1)	To accommodate a mix of uses with active commercial frontages.	Agricultural market; Apartment; Alcohol production facility; Broadcasting studio; Cabaret, bar or lounge; Commercial school; Community or assembly hall; Care facility, major; Congregate housing; Education facility; Extended medical treatment facility; Entertainment facility, indoor; Fire, police or ambulance service; Food bank; Funeral establishment; Group home; High technology business; Hotel; Library, museum or art gallery; Live/work unit; Neighbourhood pub; Office; Personal service establishment; Postal or courier service; Printing or publishing; Recreation services, indoor Restaurant; Retail, general; Transportation station; Vehicular parking areas or structures; Vehicle washing facility	COMM	Y
Neighbourhood Commercial (C2)	To accommodate a limited range of convenience services typically required on a day to day basis by residents of local neighbourhoods.	Care facility, major; Commercial school; Fire, police or ambulance service; Office; Personal service establishment; Postal or courier service; Recreation services, indoor; Retail, convenience; Restaurant, except for drive-through restaurant; Accessory uses, buildings and structures; Apartment; Home based business, minor	COMM	Y
Gasoline Service Station Commercial (C3)	To accommodate gasoline service stations with associated uses.	Gasoline service station; Restaurant; Vehicle washing facility; Accessory uses, buildings and structures; Retail, convenience	COMM	N
Service Commercial (C4)	To accommodate vehicular oriented low intensity uses and associated uses.	Agricultural market; Auctioneering establishment; Alcohol Production Facility; Broadcasting studio; Bulk fuel depot; Commercial school; Commercial storage; Community or assembly hall; Contractor services; Entertainment facility, indoor; Fire, police or ambulance service; Food bank; Funeral Establishment; Greenhouse or plant nursery; High technology business; High technology industry; Hotel; Kennel, hobby; Kennel, service; Office; Personal service establishment; Postal or courier service; Printing or publishing; Recreation services, indoor; Recycling depot; Restaurant; Retail, general; Retail, service commercial, except for heavy equipment sales, rental or repair; Vehicle washing facility; Veterinary clinic; Warehouse; Accessory uses, buildings and structures; Apartment; Outdoor storage	COMM	Y
Comprehensive Development - Westlake Neighbourhood Centre (CD1(A))		Care facility, major; Community or assembly hall; Fire, police or ambulance service; Library, museum or art gallery; Multiple residential (one unit per 150 m2 of non-residential establishments contained in the same building); Music and dance schools and private sports facilities (excluding amusement machines); Office; Personal service establishment; Restaurant; Retail, general	COMM	Y

City of West Kelowna				
Comprehensive Development – Olalla Road (CD9)	To accommodate a mix of uses comprised of multiple residential, institutional, and commercial uses in the Lakeview Heights neighbourhood centre.	Apartment; Care facility, major (in townhouse or apartment form only); Congregate housing; Entertainment facility; Fire, police or ambulance service; Office; Personal service establishment; Recreation services, indoor; Townhouse; Accessory uses, buildings and structures; Home based business, minor; Vehicular parking areas and structures	COMM	Y
Comprehensive Development – Hoskins Road (CD12)	The intent of this zone is to permit the development of a mixed-use building in the Westbank Urban Centre.	Apartment; Office; Recreational Services, Indoor; Personal Service Establishment; Retail, general; Accessory uses, buildings and structures; Home based business, minor	COMM	Y
Comprehensive Development - IHA Health Centre (CD5)	Development of government and/or non-profit public health care facilities on the southern 1.62 ha portion of the subject property. Permits both agricultural and institutional land uses.	Agriculture, general and agricultural, intensive; Extended medical treatment facilities; Health services facilities; Accessory uses, buildings and structures; congregate housing; Care facility, major; Government agencies and services; Group home; Emergency and protective services; Restaurant	INST	N
Institutional and Assembly (P2)	To accommodate institutional, administrative and associated uses.	Agricultural market; Cemetery; Community or assembly hall; Care facility, major; Congregate housing; Education facility; Extended medical treatment facility; Fire, police or ambulance service; Food bank; Group camp; Group home; Library, museum, or art gallery Office; Recreation services, indoor; Recreation services, outdoor; Transportation station; Accessory uses, buildings and structures; Restaurant; Retail, general	INST	N
Campground, Cabin and Motel Commercial (C5)	To accommodate commercial tourist accommodation in the form of campgrounds, small motels and small resorts with associated uses.	Tourist cabin; Tourist campsite space; Motel; Accessory uses, buildings and structures; Caretaker unit; Community or assembly hall; Restaurant; Retail, convenience	TCR	N
Tourist and Resort Commercial (C6)	To accommodate tourist accommodation in the form of hotels, resorts and associated uses.	Hotel; Motel; Recreation services, indoor; Recreation services, outdoor; Resort apartment or resort townhouse; Restaurant; Retail, convenience; Tourist cabin; Tourist campsite spaces; Accessory uses, buildings and structures; Caretaker unit; Home based business, minor; Personal service establishment	TCR	N

Lake Country

District of Lake Country Zoning Bylaw 561, 2007

Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
Agriculture 1 (A1)	The purpose is to provide a zone for agricultural uses as well as other complementary uses suitable to an agricultural setting.	Agriculture, extensive; Agriculture, intensive impact; Agro-forestry, including botanical forest products production; Aquaculture; Cannabis production; Greenhouses and plant nurseries; Horse riding, training and boarding, including a facility for horse riding, training and boarding; Public parks; Production and development of biological products for pest management; Single dwelling housing or a mobile home; Wineries, cideries, and meaderies	AGR	N
Agriculture 1 (Agri-Tourism Accommodation) (A1ta)	The purpose is to provide a zone for agricultural uses as well as other complementary uses suitable to an agricultural setting.	Agriculture, extensive; Agriculture, intensive impact; Agri-tourism accommodation; Agro-forestry, including botanical forest products production; Aquaculture; Cannabis production; Greenhouses and plant nurseries; Horse riding, training and boarding, including a facility for horse riding, training and boarding; Public parks; Production and development of biological products for pest management; Single dwelling housing or a mobile home; Wineries, cideries, and meaderies	AGR	N
Rural Large Parcel 1 (RLP)	The purpose is to provide a zone for rural areas of the community that have limited services, and are not expected to be developed for more intense use within the foreseeable future.	Agriculture, extensive; Aquaculture; Greenhouses and plant nurseries; Group homes, minor; Mobile homes; Single dwelling housing; Animal clinics, major; Animal clinics, minor; Bed and breakfast homes; Care centres, minor; Forestry; Home occupations; Kennels and stables; Secondary or accessory suite; Campsite spaces; Utility services, minor impact; Short term vacation rental	RUR	N
Rural Large Parcel – Oyama Road (RLPO)	The purpose is to provide a zone for rural properties along Oyama Road to allow predetermined subdivisions of new lots.	Agriculture, extensive; Aquaculture; Greenhouses and plant nurseries; Group homes, minor; Mobile homes; Single dwelling housing; Animal clinics, major; Animal clinics, minor; Bed and breakfast homes; Care centres, minor; Forestry; Home occupations; Kennels and stables; Secondary or accessory suite; Short term vacation rental; Tourist campsites; Utility services, minor impact; Zipline course, minor impact	RUR	N

Lake Country

General Industrial (I1)	The purpose is to provide for general industrial uses.	Auctioneering establishments; Automotive and equipment repair shops; Automotive and minor recreation vehicle sales/rentals; Breweries and distilleries, major; Bulk fuel depots; Cannabis production; Car washes; Commercial storage; Contractor services, general; Contractor services, limited; Convenience vehicle rentals; Custom indoor manufacturing; Emergency and protective services; Equipment rentals; Fleet services; Food primary establishment; Gas bars; General industrial uses; Household repair services; High technology research and product design; Liquor primary establishment, minor; Medical marihuana production; Outdoor storage; Participant recreation services, indoor; Private clubs; Rapid drive-through vehicle services; Recycling depots; Recycled materials drop-off centres; Service stations, minor; Service stations, major; Truck and manufactured home sales rentals; Vehicle and equipment services, industrial; Care centres, major; Residential security operator unit; Utility services, minor impact	IND	N
Heavy Industrial (I3)	The purpose is to designate and preserve land for the orderly development of industrial uses which due to appearance, noise, odour, emission of toxic wastes, or fire or explosive hazards may have detrimental effects on other zones.	Breweries and distilleries, major; Bulk fuel depots; Cannabis Production; General industrial uses; Outdoor storage; Recycling depots; Recycling plants; Recycled materials drop-off centres; Utility services, major impact; Vehicle and equipment services, industrial; Wrecking yards; Medical Marihuana Production; Residential security operator unit; Utility services, minor impact	IND	N
Soil Processing (I5)	The purpose is to provide a zone for the grading, crushing, screening, storage and processing of natural soil deposits.	Asphalt plants; Concrete plants; Recycling plants; Utility services, major impact; Offices; Outdoor storage; Residential operator security unit; Utility services, minor impact	IND	N
Minor Utilities (P3)	The purpose is to provide a zone for private and public utilities.	Utility services, minor impact; Outdoor storage; Participant recreation, outdoor	IND	N
Utilities (P4)	The purpose is to provide a zone for private and public utilities.	Utility services, major impact; Outdoor storage; Participant recreation services, outdoor; Utility services, minor impact	IND	N

Lake Country

<p>Town Centre Commercial (C1)</p>	<p>The purpose is to designate and preserve land for the orderly development of the financial, retail, entertainment, governmental and cultural core of the District.</p>	<p>Amusement arcade, major; Animal clinic, minor; Apartment hotels; Boarding or lodging houses; Broadcasting studios; Breweries and distilleries, minor; Business support services; Cannabis dispensary; Care centres, major; Commercial schools; Community recreation services; Congregate housing; Custom indoor manufacturing; Drive-in restaurants; Emergency and protective services; Financial services; Food primary establishment; Funeral services; Gaming facilities; Government services; Health services; Hotels; Household repair services; Licensee retail liquor store; Liquor primary establishment; Non-accessory parking; Offices; Participant recreation services, indoor; Personal service establishments; Private clubs; Private education services; Public education services; Public libraries and cultural exhibits; Public parks; Religious assemblies; Retail stores, convenience; Retail stores, general; Spectator entertainment establishments; Spectator sports establishments; Temporary shelter services; Used goods stores; Amusement arcade; Apartment housing; Care centres; Care centres, minor; Home occupation; Utility services</p>	<p>COMM</p>	<p>Y</p>
<p>Town Centre Commercial – Liquor Primary (C1p)</p>	<p>The purpose is to designate and preserve land for the orderly development of the financial, retail, entertainment, governmental and cultural core of the District.</p>	<p>Town Centre Commercial uses Liquor primary establishment, major</p>	<p>COMM</p>	<p>Y</p>
<p>Neighbourhood Commercial (C2)</p>	<p>The purpose is to provide a zone for the range of services needed on a day to day basis by residents within their neighbourhoods.</p>	<p>Animal clinics, minor; Animal daycare; Care centres, major; Financial services; Food primary establishment; Health services; Licensee retail liquor store; Liquor primary establishment, minor; Offices; Participant recreation services, indoor; Personal service establishments; Public libraries and cultural exhibits; Recycled materials drop-off centres; Retail stores, convenience; Amusement arcades, minor; Apartment housing; Care centres, minor; Gas bars; Home occupation; Utility services, minor impact</p>	<p>COMM</p>	<p>Y</p>

Lake Country

<p>Service Commercial (C10)</p>	<p>The purpose is to designate and preserve land for the accommodation of a mix of commercial uses, including vehicular oriented uses not provided for in other zones.</p>	<p>Amusement arcades, major; Animal clinics, major; Animal clinics, minor; Animal daycare; Auctioneering establishments; Automotive and minor recreation vehicle sales/rentals; Automotive and equipment repair shops; Breweries and distilleries, minor; Broadcasting studios; Business support services; Car washes; Care centres, major; Commercial schools; Commercial storage; Convenience vehicle rentals; Drive-in food services; Equipment rentals; Emergency and protective services; Flea markets; Fleet services; Food primary establishment; Funeral services; Gaming facilities; Gas bars; Government agencies; Greenhouses and plant nurseries; Household repair services; Liquor primary establishment, minor; Licensee retail liquor store; Non-accessory parking; Participant recreation services, indoor; Pawnshop; Private clubs; Rapid drive-through vehicle services; Recycled materials drop-off centres; Religious assembly; Retail stores, service commercial; Service stations, minor; Truck and manufactured home sales rentals; Used goods stores; Vehicle and equipment sales rentals, industrial; Vehicle and equipment services, industrial; Warehouse sales; Amusement arcades, minor; Office; Outdoor storage; Residential security operator unit; Utility services, minor impact</p>	<p>COMM</p>	<p>N</p>
<p>Highway Commercial (C11)</p>	<p>The purpose is to designate and preserve land for the orderly development of a range of commercial uses located adjacent to the west side of Highway 97 that primarily cater to the needs of the travelling public.</p>	<p>Amusement establishments, outdoor; Automotive and minor recreation vehicle sales/rentals; Automotive and equipment repair shops; Breweries and distilleries, minor; Car washes; Drive-in food services; Food primary establishment; Hotels; Motels; Participant recreation services, indoor; Retail stores, convenience; Amusement arcades, minor; Gas bar; Licensee retail liquor store; Liquor primary establishment, minor; Outdoor storage; Rapid drive-through vehicle service; Utility services, minor impact</p>	<p>COMM</p>	<p>N</p>
<p>Direct Control 1 (Emerald Beach Villas) (DC-1)</p>	<p>This zone provides for the development of a resort commercial, as well as residential units, which include two or more land use designations and accessory grounds</p>	<p>Hotel; Motel; Multiple Dwelling Housing; Accessory buildings and structures; Marina-excluding gas sales</p>	<p>COMM</p>	<p>Y</p>

Lake Country				
Direct Control 12 (Turtle Bay Crossing Development) (DC12)	This zone provides for the development of a retail commercial complex on Lot B Section 22 Township 20 Osoyoos Division Yale District Plan EPP34757.	Animal clinic, minor; Business support services; Cannabis dispensary; Care centres, intermediate; Care centres, minor; Financial services; Food primary establishment; Government services; Licensee retail liquor store; Liquor primary establishment, minor; Offices; Participant recreation services, indoor; Personal service establishments; Retail stores, convenience; Retail stores, general; Spectator entertainment establishments; Drive-in food services; Drive-through facility; Non-accessory parking; Utility services, minor impact	COMM	N
(RM5; C2)	(There is no OCP designation or description associated with this land use but was identified in the GIS data)		COMM	Y
Administration, Public Service and Assembly (P2)	The purpose is to provide a zone for administrative, institutional, public service, public administration service and assembly uses.	Care centres; Community recreation services; Congregate housing; Emergency and protective services; Extended medical treatment services; Government services; Group homes, major; Health services; Participant recreation services, indoor; Private clubs; Private education services; Public education services; Public libraries and cultural exhibits; Recycled materials drop-off centres; Religious assemblies; Temporary shelter services; Food primary establishment; Liquor primary establishment, minor; Public parks; Residential security operator unit; Retail stores, general; Utility services, minor impact	INST	Y
Direct Control 10 (Pixie Beach Resort) (DC10)	This zone provides for the continued use of the campground, cabins, and associated ancillary uses and buildings on Lot B Section 28 Township 20 ODYD Plan 31064 except Plan KAP54466.	Recreational Tourist Accommodation; Home Occupations; Secondary suite or accessory suite; Single dwelling housing; Utility services, minor impact	TCR	Y
Tourist Commercial (C9)	The purpose is to designate and preserve land for the orderly development of commercial visitor facilities.	Amusement arcades, major; Amusement establishments, outdoor; Apartment hotels; Boat storage; Drive-in food services; Hotels; Motels; Multiple dwelling housing; Participant recreation services, indoor; Recreational tourist accommodation; Amusement arcades, minor; Care centres, major; Food primary establishment; Licensee retail liquor store; Liquor primary establishment, minor; Offices; Personal service establishments; Residential security operator unit; Retail stores, convenience; Utility services, minor impact; Gas bar and marine fuel facility	TCR	N

Lake Country

<p>Tourist Commercial A (C9A)</p>	<p>The purpose is to designate and preserve land for the orderly development of commercial facilities and services for visitors to the community, encouraging a mix of commercial developments in a walkable urban setting.</p>	<p>Breweries and distilleries, minor; Food primary establishment, minor; Liquor primary establishment, minor; Hotels; Motels; Participant recreation services, indoor; Spectator entertainment establishments; Licensee retail liquor store; Offices; Personal service establishments; Residential security operator unit; Retail stores, convenience</p>	<p>TCR</p>	<p>N</p>
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Peachland

District of Peachland Zoning Bylaw No. 2400, 2023

Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
<p>Agricultural (A1)</p>	<p>To provide a zone for agriculture, dwellings, and compatible accessory uses on lots designated Agricultural Land Reserve (ALR). All lots in the ALR are subject to the Agricultural Land Commission Act, the Agricultural Land Reserve General Regulation and the Agricultural Land Reserve Use Regulation as amended from time to time.</p>	<p>Agriculture; Agriculture, Intensive; Brewery, Distillery, or Meadery, and ancillary uses; Cannabis Cultivation, Farmed; Greenhouses and Plant Nurseries; Single Detached Dwelling; Winery or Cidery, and ancillary uses; Agri-tourism; Agri-tourism Accommodation; Bed and Breakfast; Cannabis Cultivation, Micro; Cannabis Processing, Micro Cannabis Testing and Research; Home Based Business, Type I, II or III; Kennels and Stables, on lots 1.0 ha (2.5 ac) or more in size; Farm Product Processing; Farm Retail Sales; Medicinal Cannabis Dispensary; Secondary Suite; Garden Suite; Temporary Farm Worker Housing</p>	<p>AGR</p>	<p>N</p>
<p>Rural (Non-ALR) (A2)</p>	<p>To provide a zone for rural and agriculture uses outside of the Agricultural Land Reserve, dwellings and compatible accessory uses on large lots of a minimum 2.0 ha (4.9 ac) in size.</p>	<p>Agriculture, excluding Agriculture, Intensive; Brewery, Distillery, or Meadery, and ancillary uses; Cannabis Cultivation, Micro; Cannabis Processing, Micro; Greenhouses and Plant Nurseries; Single Detached Dwelling; Winery or Cidery, and ancillary uses; Agri-tourism; Agri-tourism Accommodation; Bed and Breakfast; Cannabis Testing and Research; Home Based Business, Type I, II or III; Kennels and Stables; Farm Product Processing; Farm Retail Sales; Medicinal Cannabis Dispensary; Garden suite; Secondary suite</p>	<p>RUR</p>	<p>N</p>

Peachland				
Industrial (I1)	To provide a zone to accommodate and regulate the development of light impact industry.	Auctioneering establishment; Artisan industrial; Automotive body repair and painting; Automotive and equipment repair; Automotive service uses; Cannabis cultivation, micro; Cannabis cultivation, standard; Cannabis processing, micro; Cannabis processing, standard; Contractor services; Commercial storage; Convenience store, maximum 140 m2 floor area; Freight terminal; Greenhouse and nurseries; Heliport facility; Industrial use; Industrial, light impact; Kennels and stables; Primary processing of horticultural products; Recycling depot; Utility service; Vehicle rental; Warehouse uses; Caretaker dwelling; Cannabis testing and research; Medicinal cannabis dispensary; Office; Outdoor storage; Parking facility	IND	N
Core Commercial (C2)	To provide a zone to accommodate comprehensively-designed commercial and mixed-use buildings, related amenity spaces and compatible uses on serviced urban lots. [Core commercial, including residential uses from 50 to 125 units per gross hectare (20 to 50 units per acre)].	Artisan Industrial; Assembly Use; Brewery, Distillery, or Meadery, and ancillary uses; Cannabis Processing, Micro (excluding lots abutting Beach Avenue); Cannabis Processing, Standard (excluding lots abutting Beach Avenue); Care Facility, Congregate; Care Facility, Extended Care Facility, Major and Minor; Commercial Public Piazza; Community Service; Convenience Store; Eating Establishment, excluding drive-thru restaurants; Education Facility; Entertainment Use, excluding arcades and adult entertainment; Exhibition and Convention facility; Financial Institution, excluding drive-thru banks; Health Services; High Technology Research and Product Design; Hospital; Liquor Sales, Primary; Liquor Store; Office; Multiple-unit Residential Building; Parking Facility; Personal Service; Public Building or Facility; Non-Medicinal Cannabis Store; Recreational Facility; Retail Store, excluding Adult Entertainment; Theatre; Tourist Accommodation; Winery or Cidery, and ancillary uses; Agriculture, urban; Cannabis testing and research; Medicinal cannabis dispensary; Temporary market and vendors	COMM	Y

Peachland				
Convenience Commercial (C3)	To provide a zone for service commercial uses that include services for automobiles, commercial vehicles, and other machinery.	Automotive body repair and painting; Automotive and equipment repair; Automotive service uses; Cannabis processing, micro (excluding lots abutting Beach Avenue); Cannabis processing, standard (excluding lots abutting Beach Avenue); Contractor services; Convenience store; Eating establishment; Freight terminal; Gas station; General services; Light impact industrial; Parking facility; Public building or facility; Recycling depot; Retail store, excluding adult entertainment; Vehicle rental; Cannabis testing and research; Caretaker dwelling; Medicinal cannabis dispensary; Temporary market and vendors	COMM	N
Service Commercial (C4)	To provide a zone to accommodate and regulate a mix of commercial uses oriented to vehicular traffic requiring large lots and generally are not accommodated in shopping centre and core commercial developments.	Auctioneering establishment; Automotive and equipment repair; Automotive service uses; Cannabis processing, micro; Cannabis processing, standard; Eating establishment; Education facility; Entertainment uses; Freight terminal; Gas station; General services; Greenhouse or plant nursery; Light impact industrial; Parking facility; Public building or facility; Recreational facility; Recycling depot; Retail store; Vehicle rental; Warehouse uses; Cannabis testing and research; Medicinal cannabis dispensary; Temporary market and vendors	COMM	N
Highway Commercial (C9)	To provide a zone to accommodate and regulate highway-oriented commercial development and compatible accessory uses to support the needs of the community.	Cannabis processing, micro; Cannabis processing, standard; Cannabis testing and research; Care facility, minor; Convenience store; Eating establishment; Education facility; Entertainment use; Financial institution; Freight terminal; Gas station; General services; Liquor sales, primary; Liquor store; Medicinal cannabis dispensary; Office; Parking facility; Personal service use; Public building or facility; Non-medicinal cannabis store; Recreation facility; Retail store, excluding adult entertainment	COMM	N

Peachland				
Mixed Use (CR1)	To provide a zone to accommodate mixed-commercial and medium-density residential use buildings and related amenity spaces on serviced urban lots. For clarity, the zone is not intended for properties with frontage on Beach Avenue.	Artisan Industrial; Assembly Use; Cannabis Testing and Research (excluding ground floor units); Care Facility, Congregate; Care Facility, Extended; Care Facility, Major and Minor; Commercial Public Piazza; Community Service; Convenience Store; Eating Establishment, excluding drive-thru restaurants; Education Facility; Entertainment Use, excluding arcades and adult entertainment; Exhibition and Convention Facility; Financial Institution, excluding drive-thru banks; Health Services; High Technology Research and Product Design; Hospital; Office; Medicinal Cannabis Dispensary (excluding ground floor units); Multiple-unit Residential Building; Parking Facility; Personal Service; Public Building or Facility; Non-medicinal Cannabis Store; Recreational Facility; Retail Store, excluding adult entertainment; Theatre; Tourist Accommodation; Agriculture, urban; Home based business, type (minor)	COMM	Y
Integrated Residential – Mixed Use (CR2)	To provide a zone to accommodate mixed commercial and medium density residential use buildings and related amenity spaces on serviced urban lots. For clarity, the zone is not intended for properties with frontage on Beach Avenue.	Care Facility, Congregate; Care Facility, Extended; Care Facility, Major and Minor; Convenience Store; Eating Establishment, excluding drive-thru restaurants; Health Services; Multiple-unit Residential Building; Office; Personal Service; Retail Store, excluding adult entertainment; Tourist Accommodation; Agriculture, urban; Bed and breakfast; Home based business, type 1 (minor)	COMM	Y
DB Homes Ltd. (CD2)	The intent is to provide a zone for a mixed residential and commercial development as an integrated project based upon a comprehensive development plan.	Multiple family residential Ground floor office/retail	COMM	Y

Peachland

<p>New Monaco Neighbourhood (CD10)</p>	<p>"The New Monaco neighbourhood is intended to be a master-planned community with a mix of uses, employment areas and housing options."</p>	<p>Single family; Secondary dwelling; Secondary suite; Duplex; Low density multiple; Medium density multiple; High density multiple; Residential flex unit; Vacation resort residential; Care facility, congregate; Care facility, extended; Care facility, major; Care facility, minor; Automotive service uses; Breweries and distilleries, minor; Commercial public piazza; Convenience store; Eating establishment; Entertainment uses; Exhibition and convention facilities; Gas station; General service uses; Health services; High technology research and product design; Liquor sales, primary; Liquor store; Office; Parking facility; Personal service use; Residential sales centre; Retail store; Temporary markets and vendors; Tourist accommodation; Vehicle rental, light; Winery; Artisan industrial; Industrial use, light impact; Ambulatory surgery centre; Community service; Education facility; Public building or facility; Utility service; Assembly hall, including Religious Assembly; Community garden; Recreational facility; Parks and trails, public; Parks, private; Agriculture; Agriculture, urban; Recycling depot; One secondary suite per single family dwelling unit; One secondary dwelling per single family dwelling unit; One residential flex unit per multi-family dwelling unit; Bed and breakfast; Boarding and lodging; Caretaker dwelling per commercial or industrial use; Home occupation uses; Outdoor storage; Parking facility; Primary processing, agriculture</p>	<p>COMM</p>	<p>Y</p>
<p>Public / Institutional (P2)</p>	<p>To provide a zone to accommodate and regulate the development of lands that serve the civic, cultural, educational, health, recreational, and social needs of the community.</p>	<p>Art gallery; Assembly use; Cannabis testing and research; Care facility, congregate; Care facility, extended; Care facility, major; Care facility, minor; Cemetery and crematorium; Commercial public piazza; Community garden; Community service; Education facility; Exhibition and convention facilities; Health services; Hospital; Medicinal cannabis dispensary; Office; Park; Public buildings and facilities; Recreational facility; Retail uses limited to rental establishments for sports and non-motorized recreational equipment; Utility service; Eating establishments; Parking facility</p>	<p>INST</p>	<p>N</p>
<p>Resort Commercial (C5)</p>	<p>To provide a zone to accommodate and regulate tourist accommodation and compatible uses on serviced urban lots.</p>	<p>Tourist accommodation; Vacation resort residential; Amenity space Assembly use; Caretaker dwelling; Convenience store; Eating establishment, excluding drive-thru restaurants; Exhibition and convention facility; Personal service use; Recreational facility</p>	<p>TCR</p>	<p>N</p>

Peachland

Tabletop Mountain Resort (CD 9)	The intent is to provide a zone to accommodate and regulate the development of a destination resort facility in a rural setting for tourist accommodations. The land has been divided into two sections, Section A for hotel accommodations and Section B for low density cottage-type single family.	Hotel; Accessory uses including restaurant, lounge, meeting rooms, spa, exercise rooms and swimming pool; Wineries and an associated winery lounge as licensed under Provincial legislation; Cottages; Accessory buildings	TCR	N
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Westbank First Nation

Land Use Law No. 2007-01

Bylaw Designation	Bylaw Description	Permitted Uses	Class	Residential Permitted
Business Park (BP)		Business park industrial establishment; Entertainment or recreation establishment, indoor; Office; and Accessory use, building or structure, including retail sales accessory to other uses in the BP designation.	IND	N
Light Industrial (LI)		Custom workshop, trade or service; Light industry; Utility service facility; and accessory use, building or structure, including retail sales accessory to other uses in the LI designation	IND	N
Retail Commercial (RC)		Apartment housing – above street level; Entertainment or recreation establishment, indoor; General commercial establishment, not to exceed a maximum GFA of 4,650 square metres per tenancy; Hotel or motel; Office; Personal service establishment; Place of assembly; and Accessory use, building or structure	COMM	Y
Highway Commercial (HC)		Highway commercial use; Entertainment or recreation establishment, indoor; Personal service establishment; Hotel or motel; and Accessory use, building or structure	COMM	N
Waterfront Commercial (WC)		Entertainment or recreation establishment, indoor; Entertainment or recreation establishment, outdoor; Hotel or motel; Personal service establishment; Resort housing establishment; Waterfront commercial establishment, not to exceed a maximum GFA of 1,500 square metres per tenancy; and Accessory use, building or structure	COMM	N
Public Use & Institutional (INST)		Cemetery; Civic use; Group home, major; Place of assembly; and Accessory use, building or structure.	INST	N
Recreation Commercial (REC)		Entertainment or recreation establishment, indoor; Entertainment or recreation establishment, outdoor; and Accessory use, building or structure, including a dwelling unit for an owner/operator or caretaker, or a restaurant	TCR	N

Okanagan Indian Band

Phase 1 Land Use Plan, 2021

Land Use Plan Designation	Land Use Plan Description	Permitted Uses	Class	Residential Permitted
Agricultural			AGR	N
Industrial			IND	N
Commercial			COMM	N
Institutional			INST	N
Resort Tourism			TCR	N



APPENDIX C – EMPLOYMENT TO ELAC ASSUMPTIONS

Total - Industry - Subsectors - North American Industry Classification System (NAICS) 2017	Prime ELAC	Assumed Job Allocation Shares					
		COM	IND	INST	AGR	TCR	RUR
11 Agriculture, forestry, fishing and hunting							
111-112 Farms	AGR				100%		
113 Forestry and logging	RUR						100%
114 Fishing, hunting and trapping	RUR						100%
115 Support activities for agriculture and forestry	AGR				75%		25%
21 Mining, quarrying, and oil and gas extraction							
211 Oil and gas extraction	RUR						100%
212 Mining and quarrying (except oil and gas)	RUR						100%
213 Support activities for mining, and oil and gas ext.	MIX		100%				100%
22 Utilities							
221 Utilities	IND		100%				
23 Construction							
236 Construction of buildings	IND		100%				
237 Heavy and civil engineering construction	IND		100%				
238 Specialty trade contractors	IND		100%				
31-33 Manufacturing							
311 Food manufacturing	MIX		50%		50%		
312 Beverage and tobacco product manufacturing	MIX		30%		70%		
313 Textile mills	IND		100%				
314 Textile product mills	IND		100%				
315 Clothing manufacturing	IND		100%				
316 Leather and allied product manufacturing	IND		100%				
321 Wood product manufacturing	IND		100%				
322 Paper manufacturing	IND		100%				
323 Printing and related support activities	IND		100%				
324 Petroleum and coal product manufacturing	IND		100%				
325 Chemical manufacturing	IND		100%				
326 Plastics and rubber products manufacturing	IND		100%				
327 Non-metallic mineral product manufacturing	IND		100%				
331 Primary metal manufacturing	IND		100%				
332 Fabricated metal product manufacturing	IND		100%				
333 Machinery manufacturing	IND		100%				
334 Computer and electronic product manufacturing	IND		100%				
335 Electrical equipment, appliance and component manufacturing	IND		100%				
336 Transportation equipment manufacturing	IND		100%				
337 Furniture and related product manufacturing	IND		100%				
339 Miscellaneous manufacturing	IND		100%				
41 Wholesale trade							
411 Farm product merchant wholesalers	AGR				100%		
412 Petroleum and petroleum products merchant wholesalers	IND		100%				
413 Food, beverage and tobacco merchant wholesalers	MIX	20%	80%				

Total - Industry - Subsectors - North American Industry Classification System (NAICS) 2017	Prime ELAC	Assumed Job Allocation Shares					
		COM	IND	INST	AGR	TCR	RUR
414 Personal and household goods merchant wholesalers	MIX	70%	30%				
415 Motor vehicle and motor vehicle parts and accessories merchant wholesalers	MIX	20%	80%				
416 Building material and supplies merchant wholesalers	MIX	50%	50%				
417 Machinery, equipment and supplies merchant wholesalers	MIX	20%	80%				
418 Miscellaneous merchant wholesalers	MIX	20%	80%				
419 Business-to-business electronic markets, and agents and brokers	COM	100%					
44-45 Retail trade							
441 Motor vehicle and parts dealers	MIX	50%	50%				
442 Furniture and home furnishings stores	COM	100%					
443 Electronics and appliance stores	COM	100%					
444 Building material and garden equipment and supplies dealers	MIX	90%	10%				
445 Food and beverage stores	COM	100%					
446 Health and personal care stores	COM	100%					
447 Gasoline stations	COM	100%					
448 Clothing and clothing accessories stores	COM	100%					
451 Sporting goods, hobby, book and music stores	COM	100%					
452 General merchandise stores	COM	100%					
453 Miscellaneous store retailers	COM	100%					
454 Non-store retailers	MIX	50%	50%				
48-49 Transportation and warehousing							
481 Air transportation	IND		100%				
482 Rail transportation	IND		100%				
483 Water transportation	IND		100%				
484 Truck transportation	IND		100%				
485 Transit and ground passenger transportation	IND		100%				
486 Pipeline transportation	IND		100%				
487 Scenic and sightseeing transportation	MIX		50%			50%	
488 Support activities for transportation	IND		100%				
491 Postal service	MIX	40%	60%				
492 Couriers and messengers	IND		100%				
493 Warehousing and storage	IND		100%				
51 Information and cultural industries							
511 Publishing industries	COM						
512 Motion picture and sound recording industries	MIX						
515 Broadcasting (except internet)	MIX						
517 Telecommunications	MIX						
518 Data processing, hosting, and related services	COM						
519 Other information services	COM						

Total - Industry - Subsectors - North American Industry Classification System (NAICS) 2017	Prime ELAC	Assumed Job Allocation Shares					
		COM	IND	INST	AGR	TCR	RUR
52 Finance and insurance							
521 Monetary authorities - central bank	COM	100%					
522 Credit intermediation and related activities	COM	100%					
523 Securities, commodity contracts, and other financial investment and related activities	COM	100%					
524 Insurance carriers and related activities	COM	100%					
526 Funds and other financial vehicles	COM	100%					
53 Real estate and rental and leasing							
531 Real estate	COM	100%					
532 Rental and leasing services	MIX	50%	50%				
533 Lessors of non-financial intangible assets (except copyrighted works)	COM	100%					
54 Professional, scientific and technical services							
541 Professional, scientific and technical services	MIX	92%	6%	2%			
55 Management of companies and enterprises							
551 Management of companies and enterprises	COM	100%					
56 Administrative and support, waste management and remediation services							
561 Administrative and support services	MIX	50%	50%				
562 Waste management and remediation services	IND		100%				
61 Educational services							
611 Educational services	MIX	10%		90%			
62 Health care and social assistance							
621 Ambulatory health care services	MIX	80%		20%			
622 Hospitals	INS			100%			
623 Nursing and residential care facilities	INS			100%			
624 Social assistance	MIX	60%		40%			
71 Arts, entertainment and recreation							
711 Performing arts, spectator sports and related industries	MIX	90%		10%			
712 Heritage institutions	INS			100%			
713 Amusement, gambling and recreation industries	TCR						100%
72 Accommodation and food services							
721 Accommodation services	MIX	75%				25%	
722 Food services and drinking places	MIX	95%				5%	
81 Other services (except public administration)							
811 Repair and maintenance	MIX	15%	85%				
812 Personal and laundry services	COM	100%					
813 Religious, grant-making, civic, and professional and similar organizations	MIX	55%		45%			
814 Private households	COM	100%					
91 Public administration							
911 Federal government public administration	INS			100%			
912 Provincial and territorial public administration	INS			100%			

Total - Industry - Subsectors - North American Industry Classification System (NAICS) 2017	Prime ELAC	Assumed Job Allocation Shares					
		COM	IND	INST	AGR	TCR	RUR
913 Local, municipal and regional public administration	INS			100%			
914 Aboriginal public administration	INS			100%			
919 International and other extra-territorial public administration	INS			100%			

EMPLOYMENT REALLOCATION SPLITS FOR LOCAL JURISDICTIONS

KELOWNA	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional			100%			
Agricultural				100%		
TCR	100%					
Other Rural				100%		
WEST KELOWNA	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional			100%			
Agricultural				100%		
TCR					100%	
Other Rural						100%
LAKE COUNTRY	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional			100%			
Agricultural				100%		
TCR					100%	
Other Rural				100%		
PEACHLAND	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional			100%			
Agricultural				100%		
TCR					100%	
Other Rural						100%

RDCO EAST	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial						100%
Institutional			100%			
Agricultural				100%		
TCR					100%	
Other Rural						100%
RDCO WEST	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	10%				90%	
Industrial						100%
Institutional			100%			
Agricultural				100%		
TCR					100%	
Other Rural						100%
IR #7	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional		100%				
Agricultural		100%				
TCR	100%					
Other Rural		100%				
IR #9	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional			100%			
Agricultural		100%				
TCR					100%	
Other Rural		100%				
IR #10	Shift To					
Originally Allocated	COM	IND	INS	AGR	TCR	RUR
Commercial	100%					
Industrial		100%				
Institutional			100%			
Agricultural		100%				
TCR	100%					
Other Rural		100%				

Figures shown indicate how existing and projected jobs by ELAC are reallocated to other groupings if local municipality lacks land use policies that match that ELAC (e.g. Kelowna does not feature TCR Future Land Uses, so 100% of jobs related TCR land are instead assumed to occur in Commercial lands)