

SOUTH ISLAND
**PROSPERITY
PARTNERSHIP**



South Island **Prosperity Index 2019**

Executive Summary

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**COASTAL
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TOGETHER, LET'S DO
GREAT THINGS

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AltusGroup

ARUP

Introduction

In 2017, the South Island Prosperity Partnership (SIPP), the region's economic development organization, launched the Smart South Island Initiative as a way to convene the region around pursuing a bold future using Smart Cities approaches. Over many months of consultation and in partnership with municipal and First Nations governments, SIPP developed the Smart South Island Vision 2040 – a document that presents an ideal future state for the region across five theme areas. These five theme areas were selected from those found in Victoria Foundation's annual Vital Signs report and serve as a framework for measuring holistic regional prosperity and the region's progress toward realizing the 2040 vision.

In Fall 2017, SIPP commissioned the first edition of the South Island Prosperity Index as a starting point to get the region and its citizens, stakeholders and business leaders to think about what needs to be done to move our region forward and how the region is progressing each year. In order to strengthen the value of the data through

standardization, the 2017 Prosperity Index utilized a data framework designed by the World Council on City Data (WCCD), and certified through the International Standards Organization (ISO), called the ISO 37120. This data framework allows cities to compare to each other against a broad set of indicators that, overall, determine holistic sustainability. SIPP also chose to add several localized indicators determined to be locally relevant and important to measure.

Altus Group and Arup were retained by SIPP to complete the 2019 edition of the South Island Prosperity Index. The South Island refers to South Vancouver Island, or the "Victoria Census Metropolitan Area", and the 2019 Index again measures regional performance across five theme areas. To read the full report, including more details on our methodology, visit SIPP's website: southislandprosperity.ca

The 2019 Prosperity Index is sponsored by the Coastal Community Credit Union (CCCU).

The Five Theme Areas

SIPP developed five theme areas to align with their Smart South Island initiative and reveal region-wide progress toward achieving the bold vision that was produced in the Smart South Island Vision 2040 document.

Economic Resiliency

Transportation & Mobility

Housing & Affordability

Human Health

Environmental Health

Evolving the South Island Prosperity Index

In 2019, SIPP added several new indicators to the Prosperity Index to better align with and round-out the five strategic theme areas. These new indicators include: the income of Indigenous peoples, the percentage of immigrants in our population, the percentage of employees working in public administration, and the percentage of employees working in industrial sectors.

Next year, we will be adding data from YouthfulCities, an organization undertaking research on 120 urban attributes that make a city 'youthful'. SIPP has partnered with the City of Victoria and the Victoria Foundation to have the Victoria CMA included in the report so that our region is better positioned to attract the next generation workforce.



Economic Resiliency

Measuring the ability of the region to withstand economic shocks, and its success or failure in promoting economic prosperity to as many people as possible

Indicator	Victoria CMA		Peer City Average
	2017	2019	
Debt service ratio	2.26%	2.35%	12.0%
Own-source revenue as a percentage of total revenues	95.7%	95.6%	80.9%
Voter participation in last municipal election	35.4%	38.3%	40.5%
City's unemployment rate	4.6%	3.0%	7.1%
Percentage of city population living in poverty	13.3%		12.6%
Percentage of persons in full-time employment	47.6%	47.8%	31.2%
Number of higher education degrees per 100,000 population	50,155		45,778
Jobs/housing ratio	1.12		1.38
Annual percentage change in business counts	2.2%	3.3%	4.1%
Gini co-efficient for income equality (0-1)	0.40		0.34
Average income for Indigenous people as % of income for all persons	82.3%		83.9%
Percent of employment in knowledge-based industries	11.5%		14.1%
Economic diversity - % of workers in heavily concentrated industrial sectors	24.6%		39.8%
Immigrants as % of population	18.3%		26.9%
Public Administration as % of total employees	12.9%		6.7%

Quadrant Analysis

	Better Than Peer City Average	Worse Than Peer City Average
Trending Better	<ul style="list-style-type: none"> - Unemployment rate - % of persons in full-time employment 	<ul style="list-style-type: none"> - Voter participation - Annual % change in business counts
Trending Worse	<ul style="list-style-type: none"> - Debt service ratio - Own-source revenue ratio 	
Trending Unclear (or no change)	<ul style="list-style-type: none"> - Higher education degrees per capita - Economic diversity 	<ul style="list-style-type: none"> - % living in poverty - Jobs/housing ratio - Gini co-efficient for income inequality - Immigrants as % of population - Public Administration employment as % of total - Immigrants as % of population - % employment in knowledge-based industries - Average Indigenous income as % of average across region

Summary of the Region's Performance

The region is performing well in numerous areas, with lower unemployment, and a greater proportion of persons in full-time employment. However, compared to peer cities, the region has greater rates of persons living in poverty, and higher levels of income inequality.



Transportation & Mobility

Measuring the amount of sustainable transportation infrastructure in place, and the number of trips taken via those modes

Indicator	Victoria CMA		Peer City Average
	2017	2019	
High-capacity public transport per 100,000 population (km)	0.0	0.0	4.3
Bicycle paths and lanes per 100,000 population (km)	43.0	48.1	82.7
Annual number of public transport trips per capita per year	69.3		44.5
Number of personal automobiles per capita	0.66	0.68	0.58
Non-personal-vehicle commute modal split	27.0%	27.8%	23.8%
Average commute time (minutes)	22.2		31.7

Quadrant Analysis

	Better Than Peer City Average	Worse Than Peer City Average
Trending Better	- Non-personal-vehicle commute modal split	- Bicycle paths per capita
Trending Worse		- Personal automobiles per capita
Trending Unclear (or no change)	- Annual public transport trips per capita - Average commute time	- High-capacity public transport per capita

Introducing: The Mobility Wellness Index

SIPP recently developed the Mobility Wellness Index (MWI). The MWI is the world's first comprehensive measurement framework that links how any given city or region is performing on overall wellbeing as it relates to transportation and mobility. The index is designed to meaningfully measure the effects that mobility systems have on the physical, emotional, and financial wellbeing of their users.

The MWI will show a composite score based on region or city-wide performance across 20 indicators. This will be included in the next South Island Prosperity Index.

More information on the MWI is available at southislandprosperity.ca

Summary of the Region's Performance

Compared to the peer city average, South Island residents enjoy a 30% shorter commute time, utilize alternative commuting modes in greater proportions, and take a greater number of public transport trips annually.

However, the region is under-performing relative to peer cities in terms of its available infrastructure, including high-capacity public transport, and bicycle paths and lanes per capita.



Housing & Affordability

Measuring the affordability of housing in the region relative to incomes, the diversity of tenures being added to the housing stock, and the ability of the region to house all of its citizens

Indicator	Victoria CMA		Peer City Average
	2017	2019	
Number of homeless per 100,000 population	304.4	397.8	298.7
Ratio of median monthly shelter costs to median income	18.9%		16.4%
Ratio of median monthly rental costs to median income	16.9%		13.6%
Apartment vacancy rates	0.4%	1.2%	3.1%
Rental housing as % of new housing starts	40.9%	49.3%	24.2%

Quadrant Analysis

	Better Than Peer City Average	Worse Than Peer City Average
Trending Better	<ul style="list-style-type: none"> - Rental housing as % of new housing starts - Rental apartment vacancy rates 	
Trending Worse		<ul style="list-style-type: none"> - Number of homeless per capita
Trending Unclear (or no change)		<ul style="list-style-type: none"> - Ratio of median monthly shelter costs to median income - Ratio of median monthly rental costs to median income

Summary of the Region's Performance

Most of the Housing & Affordability indicators are localized indicators. While the region has done well at providing additional rental housing supply (49.3% of new housing starts in the region were rental in tenure, which is more than double the peer city average), there are some issues associated with the availability and affordability of housing as the region, compared to peer cities, has a higher number of homeless persons per capita, a higher ratio of shelter costs to median income, and a higher ratio of median monthly rental costs to median income.



Human Health

Measuring the positive influences on human health, the availability of health practitioners, and the presence of unhealthy behaviors and outcomes

Indicator	Victoria CMA		Peer City Average
	2017	2019	
Homicides per 100,000 population	0.27	0.79	1.41
Violent crime per 100,000 population	1,152	1,175	698
Suicide rate per 100,000 population	5.7	8.0	7.7
Square meters of public indoor recreation space per capita	0.68	0.74	0.66
Square meters of public outdoor recreation space per capita	47.8	50.3	45.6
Physicians per 100,000 population	237.4	230.8	230.7
Nursing and midwifery personnel per 100,000 population	1,173		1,011
Mental health practitioners per 100,000 population	100.9		97.3

Quadrant Analysis

	Better Than Peer City Average	Worse Than Peer City Average
Trending Better	<ul style="list-style-type: none"> - Public indoor recreation space per capita - Public outdoor recreation space per capita 	
Trending Worse	<ul style="list-style-type: none"> - Homicide rate - Physicians per capita 	<ul style="list-style-type: none"> - Violent crime rate - Suicide rate
Trending Unclear (or no change)	<ul style="list-style-type: none"> - Nursing and midwifery per capita - Mental health practitioners per capita 	

Summary of the Region's Performance

The region has been outperforming peer cities by having a greater number of health professionals on a per capita basis, and has a greater amount of indoor and outdoor recreation space per capita. These two indicators have both improved over the figures reported in the 2017 Index.

However, the region has seen increases in homicide, violent crime and suicide rates, with the latter two being at rates that are above the peer cities averages.



Environmental Health

Measuring the efforts being made to reduce carbon footprints and improve sustainability, as well as the outputs that indicate the success of the efforts and measures undertaken

Indicator	Victoria CMA		Peer City Average
	2017	2019	
Green area per 100,000 population (ha)	4,121	4,121	652
Percentage of energy consumption from renewable sources	61.1%		58.8%
Fine particulate matter (PM2.5) concentration	6.4	7.4	7.8
Greenhouse gas emissions, tonnes per capita	1.76	1.75	7.58
Percentage of population with residential solid waste collection	100%	100%	100%
Total collected municipal solid waste per capita, tonnes	0.37	0.36	0.38
Percentage of the city's solid waste that is recycled	46.4%		46.7%
Percentage of city population served by wastewater collection	87.0%		97.7%
Total domestic water consumption per capita (litres/day)	285.8	312.0	233.3
Number of Southern resident orca whales	78	76	0

Quadrant Analysis

	Better Than Peer City Average	Worse Than Peer City Average
Trending Better	<ul style="list-style-type: none"> - Greenhouse gas emissions - Solid waste per capita 	
Trending Worse	<ul style="list-style-type: none"> - Fine particulate matter concentration - Number of Southern resident orca whales 	<ul style="list-style-type: none"> - Domestic water consumption per capita
Trending Unclear (or no change)	<ul style="list-style-type: none"> - Green area per capita - % of energy consumption from renewable sources 	<ul style="list-style-type: none"> - % of solid waste that is recycled - % of population served by wastewater collection

Summary of the Region's Performance

The region is performing well in terms of the Environmental Health Indicators, with six of the nine indicators being better than the peer city averages, and two of the other three indicators only slightly below that average.

The one exception is the domestic water consumption, which is well above the peer city average and has increased since 2017.

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Coastal Community Credit Union (CCCU) is the largest Vancouver Island-based financial services organization. CCCU provides a full range of products and services in personal, business, and commercial banking. At the heart of it all is a commitment to build stronger relationships in order to improve financial health, enrich people's lives, and build healthier communities.

www.cccu.ca