

CITY OF SAINT JOHN MARKET TRENDS & SWOT REFRESH



SAINT JOHN

February 24, 2021

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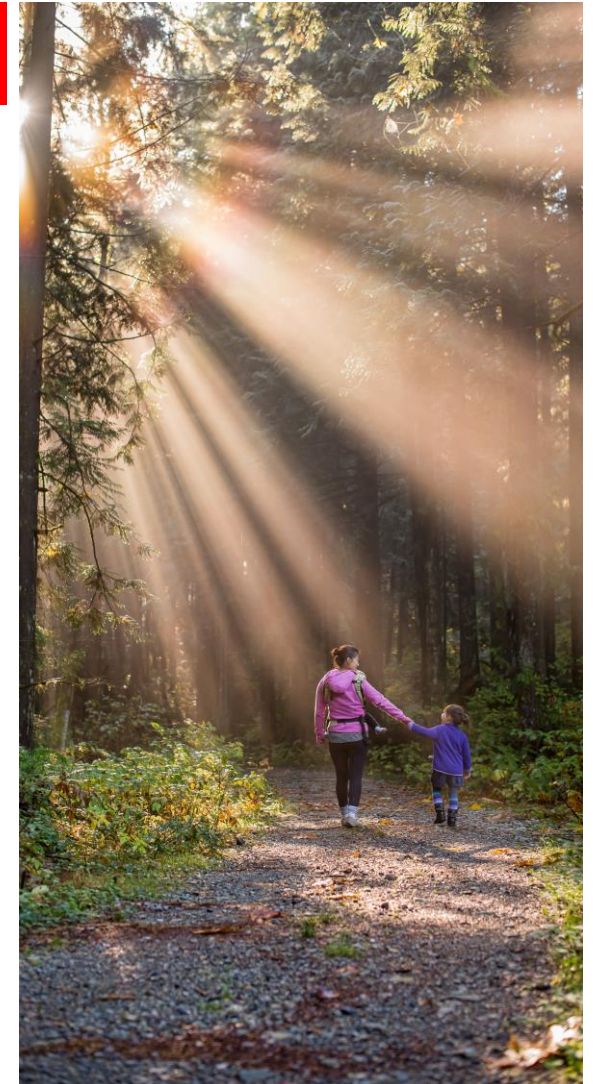
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EXECUTIVE SUMMARY

The City of Saint John asked EY to assist in performing a review and challenging existing strengths, weaknesses, opportunities, and threats (SWOT) to support the City’s strategic planning process based on emerging external trends.

 Situation	<p>The City engaged EY to conduct a market trends analysis and update its SWOT to facilitate their strategic planning. Overall, the City is going through a rapid urban change with several internal and external pressures. The Strategic Affairs are preparing a city growth strategy to make Saint John a modern, desirable, and prosperous community, whereby a refreshed SWOT would provide them with greater visibility over market trends and dynamics.</p>
 Approach	<ul style="list-style-type: none">Reviewed the City’s existing SWOT and grouped, organised, and prioritised the items based on our preselected criteria.Conducted a benchmarking exercise by looking into the EY Consumer Index to highlight relevant public trends and by identifying critical success factors behind growth in comparable fast growth cities like Kelowna, Halifax, and Oshawa.Prepared an independent SWOT analysis from the population and business growth perspectives to make the document collectively exhaustive.Held a workshop with the City’s Strategic Group to review key insights and SWOT highlights, as well as to eliminate potential gaps and missed priorities.Delivered a single report with a refreshed SWOT with prioritised items.
 Insights	<ul style="list-style-type: none">Canadians have become more cost conscious and budget conservative over the Pandemic. Austerity and Work from Home (WFH) will continue in the foreseeable future.High growth cities are exemplary in:<ol style="list-style-type: none">Appealing to residents through a favourable lifestyle and quality of life.Building a foundation for a prosperous business environment by reducing red tape, bureaucracy, and taxation, while providing business incentives.Having a strong post secondary educational ecosystem.Fostering employment opportunities and connecting talent pools with employers.Clearly communicating their growth strategies and results motivating investments and people choosing a successful community as a place where they want to liveSWOT highlights:<ol style="list-style-type: none">SJ is advantageous in desirable quality of life, developed infrastructure, and new zoning legislation.SJ can achieve growth through improving City marketing, attracting new residents with settlement incentives and employment assistance, investing further in infrastructure, and collaborating with regional partners to foster development.SJ’s growth may be hindered by low citizen retention and out migration, negative attitude, limited current and potential future air travel, and financial constraints.A Total of four strategic opportunities which emerged from the 47 opportunities identified:<ol style="list-style-type: none">Encourage migration to SJ with settlement incentives and employment support programs for students and immigrants.Improve City marketing to attract new residents, i.e., optimise communication channels to be user friendly, easy to find, and with a single growth message.Regional collaboration and alignment, and strategic development of defining air access needs for SJ and Southern NB.Invest in infrastructure and services to boost the economy and quality of life, such as expanding the port, waterfront development, business incubation space, UNB.

SWOT ANALYSIS - STRATEGIC OVERVIEW

The City has distinct strengths and opportunities that can elevate the community to be modern, prosperous, and highly developed. However, a high sense of urgency is needed to address growing weaknesses and threats.

Internal

STRENGTHS

- Quality of life
 - Entertainment, arts and culture
 - Affordability, low commute times, connected/nimble and safe community
 - Ocean environment, waterfront and river system
- Infrastructure
 - High speed internet, commercial energy rates
 - Port, UNBSJ, 3 well-served industrial parks
- Reengineered zoning and development policy and Economic Development GSJ

WEAKNESSES

- Negativity and critique from residents that translates into lack of confidence at the municipal level to enable positive change
- Complex communication channels and messaging (e.g., multiple websites)
- Homogenous and declining economy that is not stimulated by entrepreneurship
- Low appeal towards the young and immigrant demographics to settle in SJ
 - Employment concerns and limited post-secondary education options
 - Poor transportation and transit, in particular air accessibility
 - Relatively high tax rates in the region
- Multiple priorities and limited financial resources

OPPORTUNITIES

- Encourage migration to SJ
 - Settlement incentives (e.g., favourable tax rates and housing coop incentives)
 - Connector employment program (employee placement system, students and immigrants)
- Improve City marketing to attract new residents, i.e., optimise communication channels to be user friendly, easy to find, and with a single growth message
- Regional collaboration and alignment, and strategic development of defining air access needs for SJ and Southern NB
- Invest in infrastructure and services to boost the economy and quality of life
 - Expand the port, waterfront development, business incubation space, UNB

THREATS

- Demographic shift towards an ageing and declining population
 - Youth and immigrant retention
 - High tax rates and closing retail
 - Employment concerns
- Negative COVID-19 impact on the community and fiscal deficits
- Limited airport/air access due to Moncton becoming a regional hub
- Negative attitude/lack of confidence in making a change or regional cooperation
- Degrading tourism assets and climate change

External



CONSUMER AND MUNICIPAL GROWTH TRENDS

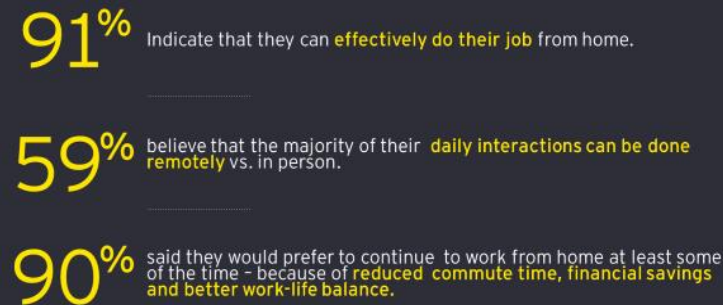
EMERGING CONSUMER TRENDS THROUGHOUT THE PANDEMIC

Canadians are resilient despite suffering financial losses. Most consumers remained employed, but their disposable incomes have declined and they are working from home. Thus, consumers look for more value and low-cost options. They focus on physical and mental well-being, while nurturing and caring for families and relationships. Moving forward, such observations will continue with more conservative spending habits.

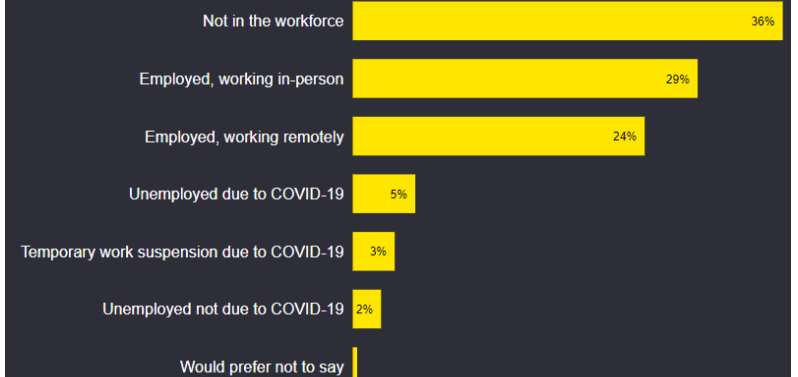
Households suffered financial losses and have lower disposable incomes.



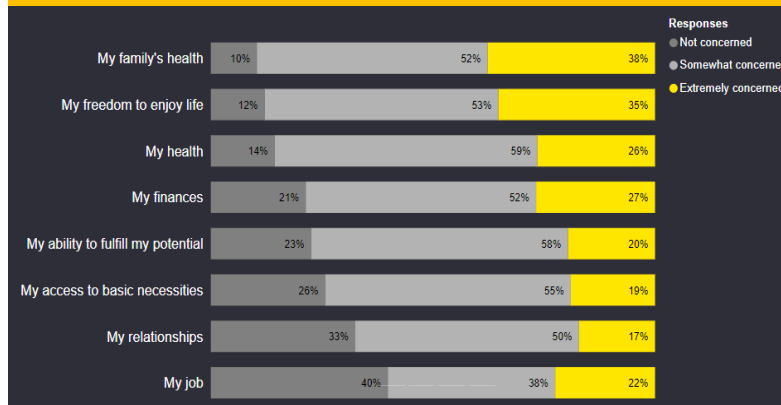
Work from Home (WFH) arrangements proved to be successful and may stay in place after the Pandemic.



A small proportion of Canadians lost their jobs, but the vast majority are still employed.



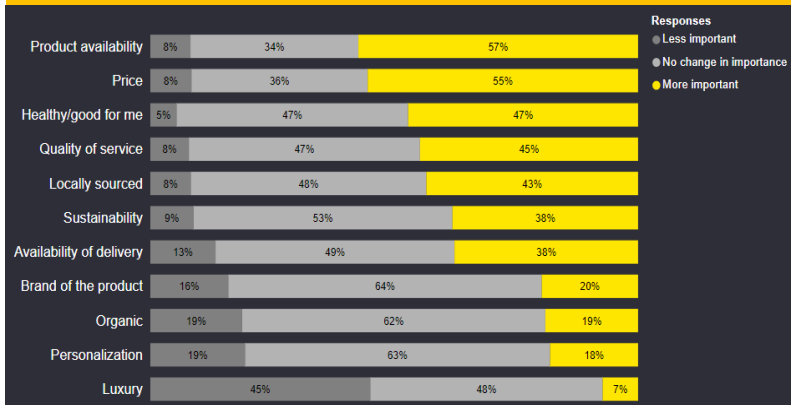
People's main concerns revolve around health, personal finances, relationships, and self-fulfilment.



Consumers spend more time indoors, thus online shopping, home cooking, and less spending are key behaviour changes.



Consumers seek value rather than hedonic appeal and luxury.



VALUE PROPOSITIONING AND ECONOMIC POLICY LESSONS FROM HIGH GROWTH CITIES

Saint John can replicate major development drivers from Kelowna, Halifax, and Oshawa to rejuvenate the local economy and instigate population growth. In particular, the City needs to create a favourable appeal for the quality of life and employment opportunities.



1. Lifestyle Appeal

People are seeking a comfortable, safe, and affordable lifestyle. Kelowna uses its climate and environmental advantage to attract young and middle-aged demographics. People enjoy the warm weather, wineries, ski hills, and lake activities. Saint John can do a similar value proposition but with forests and the oceanside.



2. Prosperous Business Environment

Growth cities excel in reducing red tape on zoning and development, establishing an economic vision, lowering costly bureaucracy and taxation. Kelowna and Halifax went 1 step further by establishing think tanks, angel investing, and entrepreneurial support entities, which attracted investment. Research shows that successful policy should encourage businesses to flourish with a natural industry attrition.



3. Advanced Education Systems

Post-secondary institutions are key to attracting the youth. Halifax has 5 major universities in the city vicinity, which positively contribute to population growth. International students are also pulled in through a variety of degrees and accessibility. If students can find employment and they enjoy living in a particular city, then there is a likelihood of them settling down.



4. Employment Opportunities

A promising business environment creates much desired jobs, which in return attract more people. However, employers must have access to talent pools and vice versa. Halifax Connector Program has been key in integrating newcomers to Canada and students within their local community by introducing potential employers with the labour force.



5. City Marketing and Transparency

Investor and citizen confidence are high when they can understand and acknowledge municipal aspirations and states. Halifax Partnership is an economic development organisation that guides the city's economic policy, whose dashboard presents a growth KPI live feed to the public with factors such as GDP, population change, etc.

GROWTH TRENDS ACROSS 3 SPOTLIGHT CITIES IN CANADA

In 2020, Canadian urban population grew by a combined 1.3% (vs 1.7% in 2019) to approximately 27.3 million residents. 90% of the growth is attributed to international migration. Below are comparable fast growth cities to Saint John and how they are achieving positive results.

			
Location	Kelowna, BC	Halifax, NS	Oshawa, ON
Population Change	4,000 new residents / +1.9% in 2020 Total ~142,000 citizens Expected to grow by 45,000 new residents by 2040	9,000 new residents / +2% in 2020 Total ~449,000 citizens Expected to grow by 100,000 new residents by 2031	9,000 new residents / +2.1% in 2020 Total ~423,000 citizens Expected to grow by 50,000 new residents by 2035
Value Propositioning	Lifestyle appeal for the middle aged and elderly with wineries, warm climate, lake and outdoor activities, skiing, and affordable real estate prices. Younger demographics seek employment and entrepreneurship opportunities with some of the above mentioned benefits. Kelowna is the most entrepreneur friendly city in Canada (Canadian Federation of Business).	Quality of life appeal through a family-friendly environment, recreational facilities, affordability and medium cost of living, and the ocean advantage. A large concentration of post-secondary institutions attracts the young demographic. Several economic and employment programs help with growing the local economy and assisting new grads in settling by finding job opportunities.	Close proximity to Toronto and the Greater Toronto Area is the main advantage for the city. Especially during the pandemic, people are looking to save their money or invest in real estate. Affordability and significantly lower cost of living combined with flexible work from home arrangements encourage people to move into this community. In addition, the area is family-friendly and more jobs are expected.
Economic Policy	Accelerate Okanagan (think tank and angel investing). Invest Kelowna (economic development commission). Official Community Plan 600 tech companies employing 8,000 people and generating \$1.3 billion in annual revenues.	Halifax Economic Growth Plan. Halifax Partnership (economic development organisation). Connector Program (employment assistance). Economic progress dashboard publicly available.	Oshawa Growth and Development (an overview of economic and development policies). TeachingCity Oshawa (an initiative focused on post-secondary collaboration and encouraging students to stay in the area)
Education	UBC Okanagan (est. in 2005) - 11,000 current students, 27.5% international students. Okanagan College Kelowna Campus (est. in 1990) - 9,000 current students, 16.7% international students.	Dalhousie University, Saint Mary's University, Mount Saint Vincent University, NSCAD University, University of King's College, and numerous others with ~35,000 students with 20% being international.	Durham College, Trent University Durham GTA, and Ontario Tech University with a total student population of ~34,000 and 10.5% international body.

HALIFAX'S CONNECTOR PROGRAM

In 2009, Halifax launched a simple and effective networking program, designed to match immigrants and students with established business and community leaders. The program helps newcomers to find employment, while increasing talent pool and access to local employers.

Program Goal and Annual Objectives

Support the Economic Growth Plan by helping achieve Halifax's "Attract and Retain Talent" goal of growing the city's labour force to 271,000 by 2021.

1 Sign up 200 new Connectors.

2 Re-engage 50 inactive Connectors.

3 Sign up 500 new Connectees.

4 Ensure at least 200 Connectees find full-time employment.

How does the Program work?


Step 1
Potential Connectees and Connectors apply through the Halifax Partnership website.

Step 2
Program facilitator reviews applicants, contacts Connectees to discuss their goals and backgrounds, and matches suitable Connectees with Connectors.








Step 3
Connectees and Connectors schedule and conduct 30-minute meetings (physically and virtually) to discuss industry details, opportunities, news, etc.







Step 4
Within 2 days after a meeting, Connectors must refer and introduce Connectees to at least 3 people in their network.









Step 5
Connectees rapidly expand their professional networks and knowledge of the local market, which increases their chances of getting a job.



Notable Partners







Results

According to 2019 Connector Client Survey:

65% of Connectees who found jobs said the Program played a role

86% of Connectees would recommend the Program to a friend

By 2019, the following milestones were achieved:

3,200+ Connectees

1,400+ Connectors

1,400+ Jobs Found

CITY OF SAINT JOHN | SWOT ANALYSIS

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A photograph of a gravel road winding through a dense forest of tall evergreen trees. The sun is low in the sky, creating a warm, golden glow and long shadows. The word "APPENDICES" is centered in white, bold, sans-serif capital letters. A thin white horizontal line is positioned below the text.

APPENDICES

APPENDIX A: SWOT ANALYSIS - FROM POPULATION AND BUSINESS GROWTH PERSPECTIVES

The City has distinct strengths and opportunities that can elevate the community to be modern, prosperous, and highly developed. However, a high sense of urgency is needed to address growing weaknesses and threats from population (white font) and business perspectives (yellow).

Internal

STRENGTHS

Quality of life
Access to waterfront and river system
Mild winters compared to the west coast of Canada
Affordable real estate
Nature and low density of population
Safety and low crime
Dedicated growth engine under newly formed Economic Development Greater SJ

Sector strength - Energy, Health, Logistics and Manufacturing, ICT/Cyber and Aquaculture
Amongst the top 10 foreign trade zone in Canada
Third largest deep water port infrastructure in Canada and access to multi-modal transportation and proximity to the US Eastern Seaboard
Three well serviced industrial parks
Commercial Energy rates

OPPORTUNITIES

1. Strengthen campaigns to focus on NB quality of life and target younger demographics/remote workers
2. Launch river tours and nature adventure tours
3. Offer tax incentives to move to NB
4. Loosen immigration restrictions and solve the recognition of professional credentials
5. Connector Program (employee placement system)
6. Attract foreign direct investments
7. Transform and better utilise vacant retail and commercial space
8. Invest in Ocean Technologies
9. Positive pandemic - attract knowledge workers
10. Flawless execution on EDGSJ mandate to garner more financial support from Provincial/Federal Govt
11. Accentuate selected sector R&D and Innovation
12. Low cost of capital (key enabler)

WHAT'S MISSING?

WEAKNESSES

Entrepreneurial climate and attitude
High tax rates compared to surrounding communities
Industrial feel
Access to international travel
Small number of employment opportunities
Blue collar work force is prominent
Transit options

Too many priorities and limited financial resources
Lack of exposure to world market
Access to qualified workforce in sufficient quantity
Limited R&D investment capacity
Confusion over the newly formed economic development entity (online presence)

THREATS

Threat of airport closure
Retail closures
Further suburbanization
Declining employment and commercial activity
Increased taxes

Find the right balance between large industrial / resource based capital intensive business and knowledge base economy to attract residents to Saint John
GHG Reduction Target and pandemic lessons will significantly impact Industry (Oil and Gas) and Supply Chain moving focus to local production and reduction in travel/exports
Significant reduction in Airport Services
Climate Change (Rising Ocean Levels)

External

APPENDIX A SWOT ANALYSIS - A COMPLETE LIST OF OPPORTUNITIES

The City can capitalise on numerous opportunities to achieve population and economic growth. Below is a consolidated list of options from the combined external (1-13) and municipal (14-47) assessments. We encourage the City to pick the top 10 opportunities rather than trying to work on too many in order to achieve momentum and results.

OPPORTUNITIES

- | | | |
|--------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------|
| 1. Strengthen campaigns to focus on NB quality of life and target younger demographics/remote workers | 14. Attracting sports events and tournaments | 31. Attracting immigrants |
| 2. Launch river tours and nature adventure tours | 15. Central peninsula school | 32. Fundy Quay project |
| 3. Offer tax incentives to move to NB | 16. Regionalisation | 33. Selling the city as a prime location for satellite offices |
| 4. Loosen immigration restrictions and solve the recognition of professional credentials | 17. New jobs in the next decade | 34. Elimination of double tax to promote development |
| 5. Connector program (employee placement system) | 18. Developing ethnic communities | 35. Port expansion |
| 6. Attract foreign direct investments | 19. Better place, better branding | 36. Growing IT hub |
| 7. Transform and better utilise vacant retail and commercial space | 20. Lobby for higher concentration of federal and provincial offices in the city | 37. Tidal and wind power (renewable energy) |
| 8. Invest in ocean technologies | 21. Improved transit links | 38. Expanding the health sector |
| 9. Positive pandemic - attract knowledge workers | 22. MBA program uptown | 39. Ashburn Lake developments |
| 10. Flawless execution on EDGSJ mandate to garner more financial support from provincial/federal governments | 23. Creating a walkable uptown | 40. SJ REDA |
| 11. Accentuate selected sector R&D and innovation | 24. Completed runway expansion | 41. Filling in vacant commercial space |
| 12. Low cost of capital (key enabler) | 25. Ferry connections | 42. Innovation district |
| 13. Concierge service for new residents | 26. Attracting international flights | 43. Milledgeville development |
| | 27. More tourist activities | 44. Inclusionary zoning policies |
| | 28. New website for the city | 45. Regionalisation |
| | 29. SJ energy dividend | 46. Encourage entrepreneurship |
| | 30. Spreading positive news | 47. Diversity training |

APPENDIX B: SWOT ANALYSIS - CITY SOURCED

The City has distinct strengths and opportunities that can elevate the community to be modern, prosperous, and highly developed. However, a high sense of urgency is needed to address growing weaknesses and threats.

Internal

STRENGTHS

- Beautiful Nature and Environment
- Infrastructure
- Public Safety
- Employment in certain industries

WEAKNESSES

- Negativity and critique from residents
- Aging recreational and residential facilities
- Limited post-secondary education options
- Poor transportation and transit
- Pollution
- Homogenous and declining economy

OPPORTUNITIES

- Improving quality of life for current residents
- Attracting migrants (cross province and international)
- Investing in commercial and residential developments
- Fostering employment opportunities
- Attracting new industries and diversifying the economy

THREATS

- Declining population and demographic change
- Climate change
- Fiscal deficits
- Competition from other municipalities
- Lack of investment in the local economy

External

APPENDIX C: SWOT ANALYSIS - STRENGTHS

The City has a total of 37 strengths that are grouped into 3 categories: low, medium, and high significance. Overall, the main value propositioning is derived from beautiful nature and environment, infrastructure, public safety, and employment in certain industries.

STRENGTHS		
Low	Medium	High
<ol style="list-style-type: none"> Heritage Cluster City Market Level 1 Trauma Centre in NB Many Jobs Available to English Speakers Dense Central Peninsula 	<ol style="list-style-type: none"> Low Commute Times Family Friendly Access to Green Spaces Natural Beauty Mild Winter Cultural Capital of Canada Only City on Bay of Bundy Saint John Energy / Electricity Prices Good Restaurant Scene Brick Park Fibre to Home High Quality Regional Facilities Pedway System Proximity to USA Post-Secondary Education Options 	<ol style="list-style-type: none"> Affordable Real Estate 3rd Largest Port in Canada Low Crime Rates Large Oil Refinery / Energy Sector Welcoming Community Multinational HQ 3 Well-Serviced Industrial Parks Strong Education System Highway through Core Cruise Industry Harbour Passage SCDW Project Significant Exports Flowing through the City Class I Railway Talented Workforce Starting to Run the City Like a Business Long Term Financial Planning

* The factors are categorized based on perceived issue importance from several surveys, e.g., Civic Issues in Calgary.

Significance

APPENDIX D: SWOT ANALYSIS - OPPORTUNITIES

Similarly, the City has a total of 36 opportunities. Overall, Saint John can benefit from improving quality of life for current residents, attracting migrants, investing in commercial and residential developments, fostering employment opportunities, and attracting new industries.

OPPORTUNITIES		
Low	Medium	High
<div><div>1. Building a Hotel Near the Airport</div><div>2. Concierge Service for New Residents</div><div>3. Attracting Sports Events and Tournaments</div></div>	<div><div>1. Central Peninsula School</div><div>2. Regionalisation</div><div>3. New Jobs in the Next Decade</div><div>4. Developing Ethnic Communities</div><div>5. Better Place, Better Branding</div><div>6. Lobby for Higher Concentration of Federal and Provincial Offices in the City</div><div>7. Improved Transit Links</div><div>8. MBA Program Uptown</div><div>9. Creating a Walkable Uptown</div><div>10. Completed Runway Expansion</div><div>11. Ferry Connections</div><div>12. Attracting International Flights</div><div>13. More Tourist Activities</div><div>14. New Website for the City</div><div>15. SJ Energy Dividend</div><div>16. Spreading Positive News</div></div>	<div><div>1. Attracting Immigrants</div><div>2. Fundy Quay Project</div><div>3. Selling the City as a Prime Location for Satellite Offices</div><div>4. Elimination of Double Tax to Promote Development</div><div>5. Port Expansion</div><div>6. Growing IT Hub</div><div>7. Tidal and Wind Power (Renewable Energy)</div><div>8. Expanding the Health Sector</div><div>9. Ashburn Lake Developments</div><div>10. SJ REDA</div><div>11. Filling in Vacant Commercial Space</div><div>12. Innovation District</div><div>13. Milledgeville Development</div><div>14. Inclusionary Zoning Policies</div><div>15. Regionalisation</div><div>16. Encourage Entrepreneurship</div><div>17. Diversity Training</div></div>

* The factors are categorized based on perceived value creation in the City and importance of market trends.

Significance

APPENDIX E: SWOT ANALYSIS - WEAKNESSES

Moreover, the City has 39 weaknesses. Saint John is facing negativity and critique from residents, aging recreational and residential facilities, limited post-secondary education options, poor transportation and transit, pollution, homogenous and declining economy.

WEAKNESSES		
Low	Medium	High
<ol style="list-style-type: none"> 1. No Uptown Grocery Store 2. Too Many City Brands 3. Fog and Cool Summers 4. Heritage District is Too Small 5. Majority of Businesses Closing at 5pm 	<ol style="list-style-type: none"> 1. Lack of Knowledge from the People "Selling" the City 2. High Water / Sewer Rates 3. Perceived Financial Crisis at City Hall 4. Lack of Development Outside of Uptown 5. Slow Pace of Life 6. Poor Health of Some Local Residents 7. Old Sports Facilities 8. Disjointed Settlement 9. Perception of Lack of Parking 10. Lack of Trust Between Partners 11. Lack of Physical Recreation Assets 12. Lowest Growth vs Every Other Atlantic CMA 13. Homelessness 14. Youth Do not Have a Vision of Staying 15. Past Financial Decisions 16. Lack of Own Source of Revenue 17. Poor Succession Planning and Information Silo's 	<ol style="list-style-type: none"> 1. High Property Taxes 2. High Poverty Rates 3. Pollution 4. Employers not Hiring Immigrants 5. Labour Supply and Demand Misalignment 6. Lack of New Housing 7. High Commercial Vacancy Rate 8. Higher Salaries in Other Places 9. Difficult Access for People with Disabilities 10. Lack of Single Unit Buildings and Cost Competitive Methods for such Development 11. Limited Night Life 12. Limited Degree Options in Saint John 13. Difficult to Get Public Sector Jobs without French 14. Lack of Infrastructure to Build New Developments 15. Limited Transit 16. Lack of Exposure to World Markets 17. Reliance on Debt

* The factors are categorized based on perceived negative impact on opportunities and strengths.

Significance

APPENDIX F: SWOT ANALYSIS - THREATS

Finally, the City has a total of 27 threats. In the near future, Saint John may face devastating effects from a declining population and demographic change, climate change, fiscal deficits, competition from other municipalities, and lack of investment in the local economy.

THREATS		
Low	Medium	High
<div><div>1. Heritage Planning Restrictions and Lack of Designation</div><div>2. Telegraph Journal has a Negative Slant Towards the City</div><div>3. UNB not HQ in the City</div></div>	<div><div>1. Sprawl / Low Density</div><div>2. Competition Between Three Cities</div><div>3. Quality of Life is Perceived Better or More Affordable Outside the City</div><div>4. Lack of Political Willingness from GNB on Municipal Reform</div><div>5. Local Negativity and Public Opinion</div><div>6. More New Housing in KV</div><div>7. Regional Facilities (Capital Cost Sharing)</div><div>8. Losing Tenants at TD Station and Other Facilities</div><div>9. Online Shopping Affecting Local Shops and Malls</div><div>10. Major Industrial Accidents</div><div>11. Lack of Transportation Options</div><div>12. Cyber Security</div></div>	<div><div>1. City's Financial Situation</div><div>2. Closure of Service Based Businesses Lack of Qualified Labour for Certain Sectors</div><div>3. Outmigration</div><div>4. Flight from Urban Core to Suburbs</div><div>5. Smallest Airport in Southern NB with a Risk of Closure</div><div>6. Aging Population</div><div>7. Increasing Rent Costs to Tenants Due to Supply Shortage and Lack of External Buyers</div><div>8. Climate Change (Rising Ocean Levels)</div><div>9. Restrictive Building and Housing Plans May Limit Investment and Growth</div><div>10. Declining Industries (e.g., Oil)</div><div>11. Tax Base Growth</div><div>12. COVID-19 Impact</div></div>

* The factors are categorized based on perceived potential cost and damage to the City.

Significance

APPENDIX G: ROUND TABLE DISCUSSION

Q1. Given the strategic growth pillars of the City, please indicate the top (3) strengths that you believe offer tremendous potential for growth.

- Urban experience, arts and culture, connected and nimble
- Regional setting, beautiful, regional asset, port, UNBSJ
- Waterfront and river system, port, manufacturing/logistics
- Affordability, high speed internet, low commute times

Q2. Identify the top 3 threats for the City.

- Population decline, airport/air access, COVID impact, tired tourism assets, NB push to be build
- Negative attitude, lack of external brand, regional cooperation
- Tax rate, low retention rates (youth and immigrants), lack of jobs matched with talent
- Airport, retail, balance in industrial and knowledge base and industrial/residential quality of life

Q3. Identify (3 new) opportunities the City should explore further.

- Waterfront development. Business incubation space, drastically expand UNB
- Urban and waterfront development, grow the health and university cluster, supercharge population growth efforts
- Housing coop incentives to answer affordable housing, waterfront development and port partnership, knowledge workers, e-commuting
- Southern NB profile enhanced as a growth leader, a full repositioning based on performance

Q4. Prioritize your top 3 opportunities from the list.

- Immigration, port expansion, low cost of living
- Supercharge population growth, grow the health and university cluster, urban and waterfront development
- E-commuting with knowledge worker with digital campaign, nature/water/port
- Regional collaboration and alignment, investment into infrastructure and assets, with strategic development define air access needs for Southern NB

Q5. What investments would you prioritize for the City to foster growth for the City?

- Job matching, leverage port, expand industrial parks, market affordable real estate
- Quality of life, investments, arts, culture and recreation, waterfront development, urban infrastructure
- Schools, housing needs, incentives
- Outdoor natural walking trails, active transportation, pedestrian systems and roads