

# Building on our Success:

## A Strategic Plan for Greater Moncton

April 2004

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## Executive Summary

After a several month process that involved background research, a facilitated strategic planning exercise, a number of industry round tables and interviews with business leaders, Enterprise Greater Moncton has developed a strategic plan to guide the economic development activities of the community for the next five years.

There is a clear sense among business, government and community leaders in Greater Moncton that the economic growth the region has benefited from over the past 10-15 years needs to be sustained or even surpassed as we move forward. This growth has led to a new sense of optimism and confidence among the residents and businesses in the community and has been a major factor in why the community is the second fastest growing urban area in Atlantic Canada.

However, there is also a deeply held belief among most stakeholders that Greater Moncton is going to have to take more direct control over its economic development. Provincial government priorities are changing and the competition for economic development is considerably greater than it was even a few short years ago.

There was unanimous consent that the stakeholders want to continue to build the community as a great place to live, work and do business. To achieve this goal, we must:

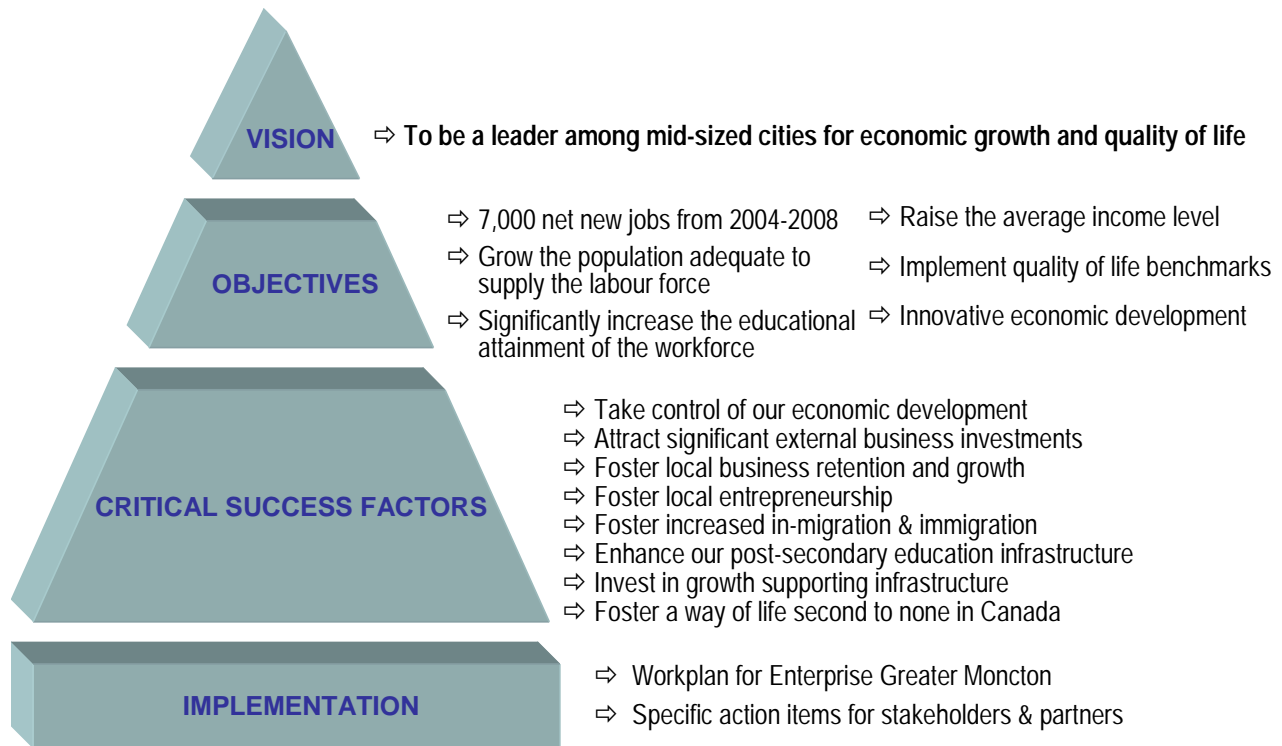
- Take control of our economic development
- Attract new business
- Grow existing business
- Attract people
- Build new infrastructure

At the core of the strategic plan is the vision for the economic development of the community. Based on the public consultations, interviews with key business, government and community leaders as well as the sector round tables, it is clear that the stakeholders want Greater Moncton to increase the quality of jobs in the economy and to increase the level of educational attainment in the workforce. In addition, it was also clear that Greater Moncton should not sacrifice a high quality of life to achieve its economic goals.

The vision for Greater Moncton is:

**For Greater Moncton to be a leader among mid-sized cities  
for economic growth; the creation of high quality  
employment; educational attainment in the workforce;  
and quality of life.**

To achieve this vision, Enterprise Greater Moncton has developed, based on input from the community, a set of objectives and associated critical success factors that, if achieved, will help Greater Moncton achieve its vision of being a Canadian leader among mid-sized cities for economic growth and quality of life.



The preparation of this strategic plan is not the end of a process – rather a beginning. From here, Enterprise Greater Moncton will develop a new workplan that will reflect the priorities outlined in this plan. Other stakeholder groups in education, health care, industry and government will take on activities that will lead to the attainment of our objectives and support the vision. The community will have to make good decisions about what activities are undertaken and where scarce resources are invested. In all cases, Enterprise Greater Moncton and its partners will keep the overall vision for the community at the core. If we can achieve our objectives and support our vision, Greater Moncton will be a great place to work and live for many years to come.

# 1. Setting the Context

These are exciting and challenging times for the Greater Moncton community. Over the decade of the 1990s and into the 2000s Greater Moncton has been a leader for economic growth in Atlantic Canada achieving a population growth rate of 10% from 1991 to 2001, over 9,000 net new jobs created and some 8,000 net new migrants into the community. And the strong growth has been continuing since 2001 supported by a retail and construction boom.

The growth of Greater Moncton is even more impressive considering the downsizing that was happening simultaneously in other industries such as government services as well as the winding down of the CN Shops employment.

Greater Moncton stands at a crossroads. Despite the strong economic growth of the past 10-15 years, significant challenges exist if Greater Moncton is to sustain or surpass this level of growth. The frequency of new business investments in the community has been decreasing. According to Industry Canada data, the number of foreign direct investment (FDI) projects into the Greater Moncton region has slipped from the number one spot in Atlantic Canada throughout most of the 1990s to below average from 2000 to 2004<sup>1</sup>. This type of business investment has been critical to the success of Greater Moncton and a sustained lack of foreign business investment would significantly hamper the region's ability to grow.

In addition, the competition for new business investments and economic development has changed. No longer is Greater Moncton competing with Saint John, Halifax and Sudbury, it is now competing with India, The Philippines and Puerto Rico for white collar jobs and China for manufacturing jobs. In the past three years alone, over 250,000 call centre and back office jobs have moved out of North America into these offshore locations. These are jobs that Greater Moncton was a leading contender for in the 1990s.

Unlike many Atlantic Canadian communities, Greater Moncton has benefited from both external business investment and the growth of local entrepreneurs. For example the manufacturing sector, which is dominated by local entrepreneurs, saw its employment base grow by over 67% from 1991 to 2001 while declining in Canada as a whole. At the same time, many of North America's top multi-national firms such as UPS, Royal Bank, FedEx, Camco and AOL Canada made significant investments in the community and created several thousand new jobs. It is clear that a mix of externally generated business investment and local business growth is required for the Greater Moncton region to sustain or surpass the economic growth of the recent past.

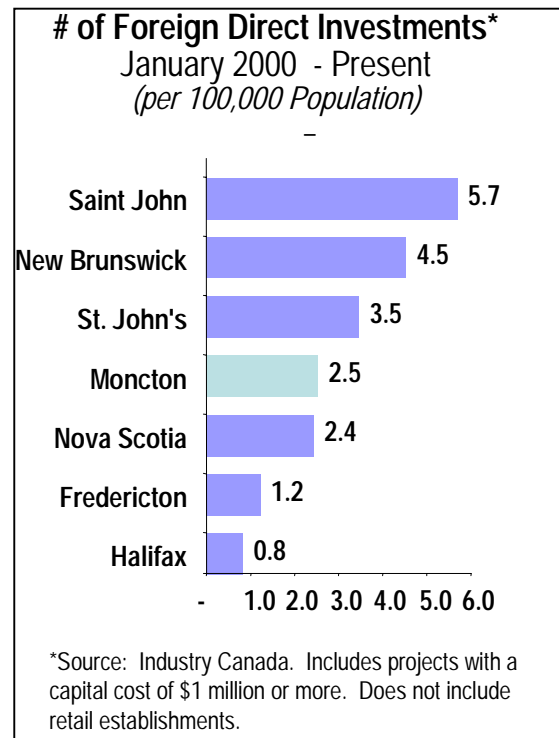


Figure 1

<sup>1</sup> Foreign direct investments are from companies based outside of Canada.

# 1. Setting the Context (cont.)

## 1.1 Background Research – Towards a Vision

To help understand the current economic and demographic context facing the community, Enterprise Greater Moncton commissioned a background research report that evaluated the recent economic and demographic trends in the Greater Moncton region and compared it with other communities in the region and nationally.

The key finding of the research is that Greater Moncton has emerged as the dominant economy in New Brunswick. As of 2004 the community has the largest population (on a population density basis<sup>2</sup>) and the largest labour market in New Brunswick. In addition, Greater Moncton has the highest percentage of business establishments and the largest wholesale and retail market in the province.

Greater Moncton is, by far, the most significant economic growth engine for the Province of New Brunswick. While the net out-migration from New Brunswick was over 10,000 people during the 1990s<sup>3</sup>, the net in-migration to Greater Moncton was over 8,000 people curtailing a potentially greater out-migration of the provincial labour force.

	<u>1991</u>	<u>2001</u>	<u>Inc./Dec.</u>	<u>% of NB Total</u>
NB	355,695	371,805	16,110	
Moncton CA	56,175	65,305	9,130	56.7%
Fredericton CA	42,160	46,270	4,110	25.5%
Saint John CMA	62,435	61,545	(890)	-5.5%
Bathurst CA	12,710	11,695	(1,015)	-6.3%
Edmundston CA	10,425	11,435	1,010	6.3%
Campbellton CA	6,585	5,955	(630)	-3.9%

Figure 2

While the growth rate has been impressive in the Atlantic Canadian context, it is less so on a national basis. Greater Moncton's population growth from 1991-2001 was the second best in Atlantic Canada but 44th out of the 130+ urban areas in Canada. Greater Moncton has also struggled in the area of immigration<sup>4</sup>. Only 650 of the 17,500 immigrants to Atlantic Canada from 1991 to 2001, settled in Greater Moncton. There were over 1.8 million immigrants to Canada during the same time frame.

On the job creation front, Greater Moncton exhibited above average growth from 1991-2001. The vast majority of these jobs were in information technologies (1,500+ new jobs), manufacturing (1,300+ new jobs) and call centres (4,000 new jobs). Greater Moncton now has the largest call centre industry in Canada – by far – as measured by the % of customer service occupations in the workforce. While the manufacturing workforce in Canada declined 10% from 1991 to 2001, Greater Moncton's manufacturing sector grew strongly. Total employment in the sector is up 67% since 1991. Greater Moncton now boasts more manufacturing workers as a percentage of the labour force than any other urban area in Atlantic Canada. The transportation and warehousing sector also went through strong growth with a 45% increase in Material Handling occupations.

<sup>2</sup> The Saint John Census Metropolitan area has a larger population but it is spread out over a larger geographic area.

<sup>3</sup> Out-migration refers to the number of people moving out versus moving in (in Canada and internationally).

<sup>4</sup> Immigration refers to people moving in from other countries while in/out migration refers to population flows within Canada.

Other interesting industry trends include:

- Greater Moncton's IT sector has been growing and now sits behind only Fredericton among Atlantic Canadian urban areas for IT employment.
- Greater Moncton has a lower percentage of creative and cultural occupations compared to other urban areas. However, there has been strong growth since 1991.
- Greater Moncton has a much lower rate of micro-businesses (less than 10 employees) than the province and Canada as a whole.
- Greater Moncton has a lower self-employment rate than NB and Canada as a whole.

On the education front, the Greater Moncton labour force still faces some significant hurdles. The research revealed that Greater Moncton has among the lowest rates of university-educated workers among urban areas in Canada. In addition, the community also has among the lowest rates of university students among urban areas<sup>5</sup>. However, Greater Moncton has a much higher percentage of high school graduates and persons with 'some post-secondary' than New Brunswick as a whole reflecting the skilled trades and blue collar nature of the workforce. Most likely as a result of the successful role of the Université de Moncton, there are 42% more Francophones with a university education than Anglophones (as a % of population).

The following chart shows where Greater Moncton ranks for three demographic indexes. These indexes are taken from recent research on the role of the 'creative class' on economic development<sup>6</sup>.

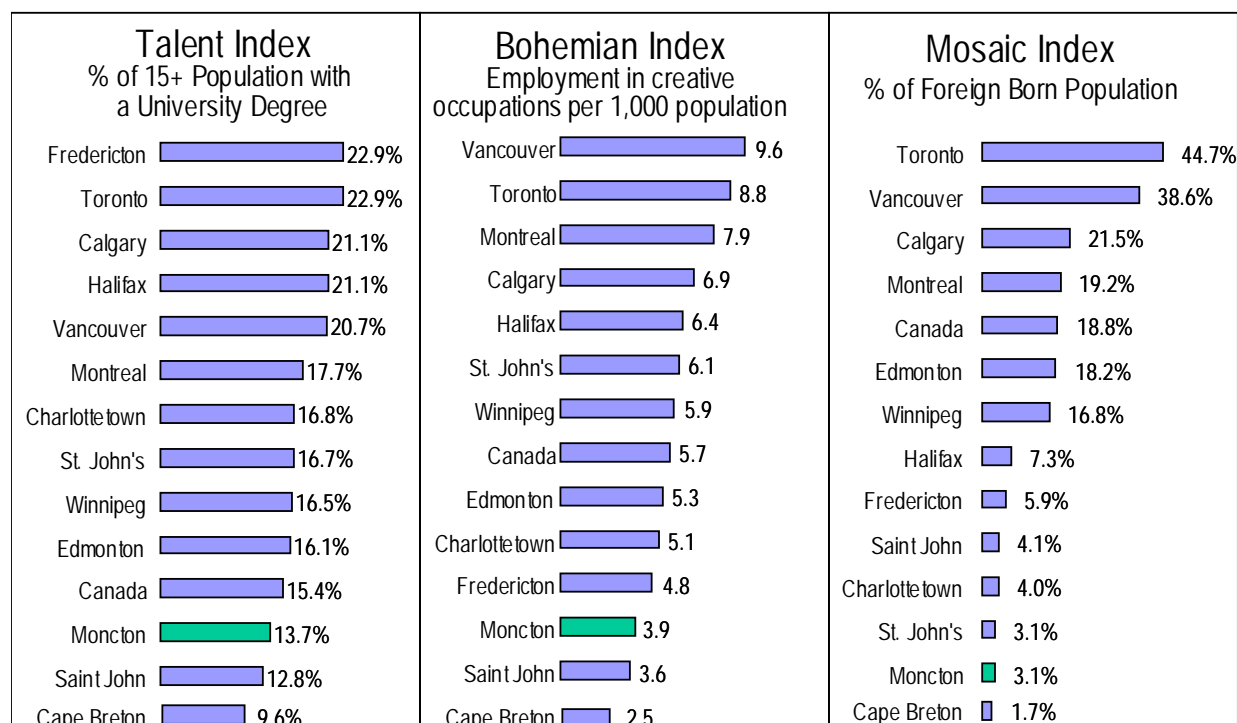


Figure 3

<sup>5</sup> Mount Allison University was not included in this statistic for two reasons: 1) Sackville is not in the Greater Moncton Census Agglomeration (CA) and 2) it is unclear the direct effect that Mt. A. has on the Greater Moncton economy.

<sup>6</sup> See Appendix F: Towards a Vision – Section 2.9.

Other key statistics include:

- Greater Moncton is now one of the most bilingual communities in Canada (ahead of Ottawa).
- ¼ of all Anglophones speak French and 92% of Francophones speak English.
- The workforce and work environment in Greater Moncton is becoming increasingly bilingual.
- Real median family income in Greater Moncton decreased slightly from 1990 to 2000 while increasing at the provincial and national levels. The decrease was only -0.6% over the ten-year period.
- Other major urban areas such as Halifax, Saint John and St. John's also registered a decline indicating a trend in urban Atlantic Canada.

## 1.2 Growth Foundations

While it will take a significant and sustained effort to achieve the objectives laid out above, Greater Moncton is not starting from scratch. The community has a number of key attributes and strengths that have been the foundation of the last decade's economic growth and will continue to differentiate us going forward. A few key growth foundations include:

- Greater Moncton offers a competitive operating cost environment. According to KPMG's review of over 100 global cities, Greater Moncton is among the lowest cost communities for almost every major cost factor.
- The community has a track record of strong economic growth. Greater Moncton knows what it takes to be successful.
- Greater Moncton has a proven ability to attract migrants from other parts of New Brunswick and Canada. Greater Moncton is large enough to offer big city amenities such as sports, theatre and shopping but small enough to have a low crime rate, affordable housing and a community atmosphere.
- Greater Moncton has a proven ability to work together. The collective efforts of municipal governments and other partners over the past 15 years has led to a transformation of Greater Moncton from a community with high unemployment and out-migration of its youth to one with among the lowest rates of urban unemployment in Canada and a strong in-migration of youth. The common face put on by the three municipalities and other local partners has been a major catalyst for this growth.
- The community has a unique geographic position at the centre of the Maritime provinces. This natural advantage will continue to benefit industries such as retail, transportation/distribution and tourism.
- Greater Moncton now has a diversified economic base. At one point in our history, the CN Shops employed upwards of 25% of the community's workforce. Now, no single company employs more than 1.5% of the workforce and employment is spread out across many sectors.
- Greater Moncton has one of the most bilingual communities in Canada. In the 1990s, Greater Moncton passed Ottawa for the percentage of its population that speak both official languages. This is a great advantage going forward.
- Greater Moncton has the most entrepreneurial climate in all of Atlantic Canada. Some of the region's top corporations were founded by entrepreneurs in our community including companies such as Pizza Delight, Armour Transport and Spielo.

### 1.3 Cooperation: A key to Greater Moncton's success

Through the 1990s, the 'Greater Moncton' approach to economic development (an investment in one of the three communities is an investment in all) was cited time and time again by both internal stakeholders and external investors as a key advantage that the community had over the competition.

Now, most of Greater Moncton's competition is taking this approach (i.e. Greater Halifax, Greater Fredericton, etc.) and at the same time there is a perception among the business community that we have lost the unity of purpose and direction that was so successful for Greater Moncton in the 1990s.

This belief was reinforced by the interviews and the roundtables for the strategic plan. There is a clear sense that the three municipalities (and other specific municipally-based groups) must come together again to address jointly key challenges facing the community.

### 1.4 Economic Development Timeline

The 1990s was arguably one of the most successful decades for the Greater Moncton region. There were a number of economic development milestones as depicted in the following timeline:

#### Economic Development Timeline (1989 – 2003)

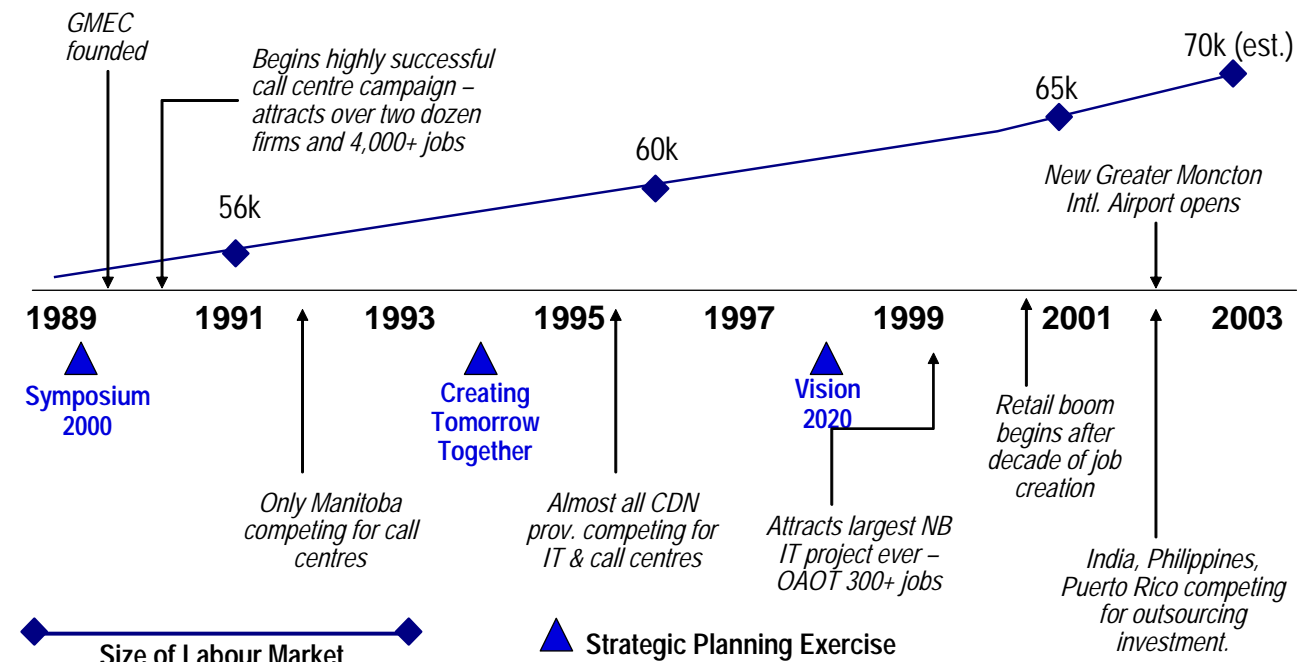


Figure 4

## 1.5 A SWOT for Greater Moncton

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Low operating cost environment.</li> <li>▪ Bilingual labour force.</li> <li>▪ Above average high school &amp; college level educated workforce.</li> <li>▪ Proven ability to attract migrants from other parts of Canada.</li> <li>▪ Track record of strong growth in key sectors such as call centres, IT, manufacturing and transportation/ warehousing.</li> <li>▪ Solid brand awareness in Canada as a good place for business.</li> <li>▪ Located at the centre of the Maritimes. Good road and rail access to major markets.</li> <li>▪ Largest airport in New Brunswick.</li> <li>▪ Growing arts and cultural community – a key component of the creative community.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Have not attracted immigrants.</li> <li>▪ A below average university educated workforce.</li> <li>▪ Low levels of university students and new university graduates.</li> <li>▪ A tightening labour pool for specific sectors such as the call centre industry.</li> <li>▪ A lower than average self-employment rate.</li> <li>▪ Limited access to risk capital.</li> <li>▪ Non competitive economic development incentive programs within key industry sectors.</li> <li>▪ Lack of a brand image beyond the borders of Canada.</li> <li>▪ A lower than average percentage of cultural and creative occupations in the workforce.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ Evolving the call centre industry into business process outsourcing. Becoming a hub for 'near shore' BPO operations.</li> <li>▪ Leveraging the growth of the manufacturing sector into further organic and externally generated growth.</li> <li>▪ Capitalizing on our growing arts and cultural sectors to become a creative community and accelerate creativity and innovation.</li> <li>▪ Expanding our marketing reach through partnerships such as the Greater Moncton Strategic Partnership.</li> <li>▪ Growing our average income levels through the attraction of higher skilled jobs.</li> <li>▪ The changing nature of the relationship between the Federal and municipal governments could lead to new funding and partnership opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The increasing outsourcing of service and manufacturing jobs to Asia.</li> <li>▪ An increasing educational and income gap between Anglophones and Francophones in Greater Moncton.</li> <li>▪ The lower amount of youth 15-24 in school.</li> <li>▪ The perception that Greater Moncton is 'getting it all' at the expense of other communities in New Brunswick.</li> <li>▪ The increasing competition for investment attraction in the sectors in which Greater Moncton has a solid track record.</li> <li>▪ Potential fragmentation of economic development activities within the Greater Moncton region itself.</li> <li>▪ A lack of available office space.</li> <li>▪ A decreasing government employment base.</li> </ul>

## 2. The Strategic Planning Process

The Greater Moncton region has been a leader in the use of strategic planning to guide the community's economic development. The 1989 strategic planning exercise, Symposium 2000, has been credited as a major driver of the successful economic development of the region during the 1990's.

From 1989 to today, there have been four community-wide strategic planning efforts including:

- Symposium 2000 (1989)
- Creating Tomorrow Together (1994)
- Vision 2020 (1998)
- Building on our Success (2004)

The current strategic planning process was initiated by Enterprise Greater Moncton (EGM) in November of 2003. EGM believes that the evolving competitive environment, the tightening labour market in Greater Moncton, the changing economic development strategies of the provincial and federal governments and a general sense that the community needs to refocus its efforts were the driving forces behind the **Building on our Success** exercise.

In 2002, Grant Thornton completed a report for the City of Moncton outlining some strategies and tactics that could be used to enhance the region's economic development. Enterprise Greater Moncton established a committee in early 2003 to deal with the Grant Thornton report and look for ways to integrate components of it into EGM's workplan. This report was used as one of the inputs for the Building on our Success strategic planning process.

## 2.1 Timeline for the Strategic Plan

- November 2003      ■ Enterprise Greater Moncton initiates strategic planning process to refocus community efforts
- December 2003    ■ Background research document completed – *Towards a Vision* – builds the context for the strategic planning process.
- December 2003    ■ Questionnaire posted for public input on Canadaeast.com
- January 2004       ■ EGM hosts facilitated strategic planning process with over 50 community participants to reflect on the past and plan for the future.
- November 2003 – January 2004    ■ Interviews are held with key representatives from Greater Moncton's major industries; Information Technology, Transportation/Distribution, Communications/Contact Centres, Manufacturing, Business (general)
- January – March 2003    ■ Sector Round Tables
  - Business leaders
  - Education
  - Health Care
  - Arts & Culture
- April 2004        ■ Draft strategic plan brought forward for review by Enterprise Greater Moncton's board of directors and key stakeholders.
- June 23            ■ Key municipal leaders asked to sign on to the new strategic plan at a community economic development breakfast.

### Economic Development Timeline (2004 - )

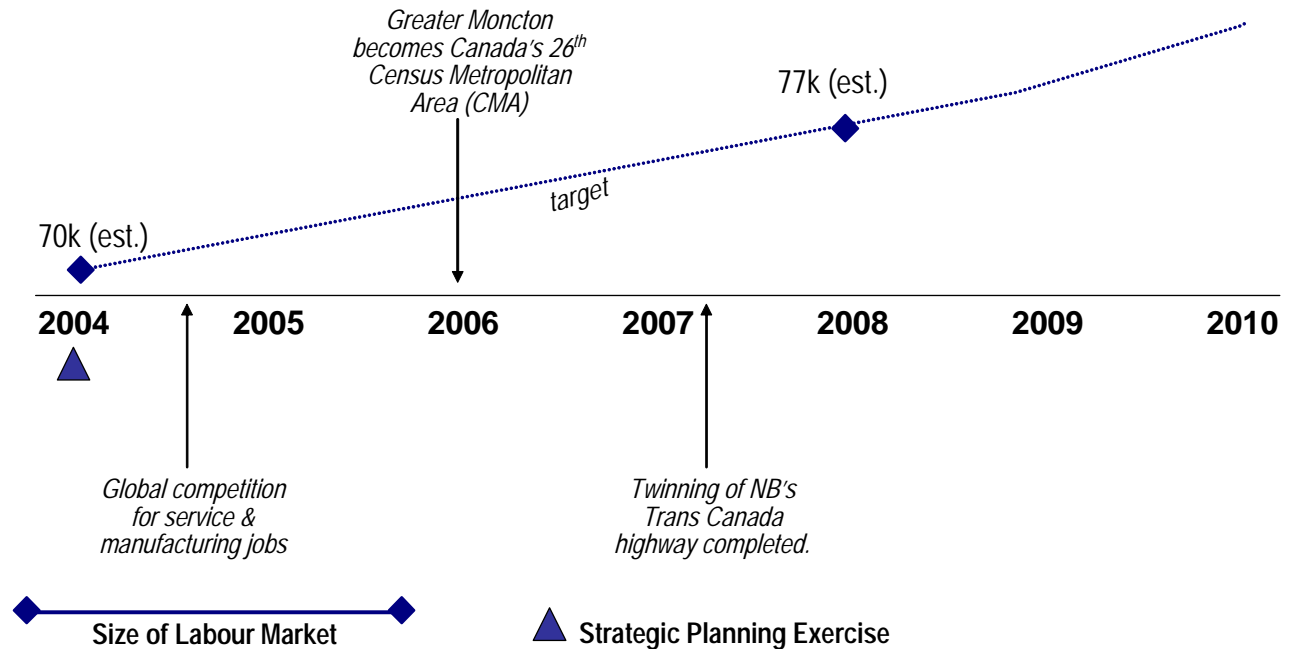


Figure 5

## 3. The Strategic Plan

The strategic plan that is intended to guide the economic development of the Greater Moncton region was borne out of a rigorous community input process as well as a detailed analysis of the competitive environment and an objective review of the strengths and weaknesses of the Greater Moncton region.

### 3.1 The outcome of the planning process

There is a clear sense among business, government and community leaders in Greater Moncton that the growth the region has benefited from over the past 10-15 years needs to be sustained or even surpassed as we move forward. There is also a deeply held belief among most stakeholders that Greater Moncton is going to have to take more direct control over its economic development. Provincial government priorities are changing and the competition for economic development is considerably greater than it was even a few short years ago.

There is unanimous consent that the stakeholders want to continue to build the community as a great place to live, work and do business. To achieve this goal, we must:

- Take control of our economic development
- Attract new business
- Grow existing business
- Attract people
- Build new infrastructure

The summary approach and conclusions of the strategic plan are found in Figure 6 below. It is important to point out that the strategic plan is not a work plan for Enterprise Greater Moncton. Rather, it is an overall guide that provides the objectives and focus areas for the region as a whole. Some, in fact many, of the resulting tactics and activities that come out of the strategic plan will be integrated into the Enterprise Greater Moncton workplan as a next phase to this process. However, many other stakeholders in the community will also have to take ownership of the strategic plan for their specific areas (i.e. health, education, community development, etc.).

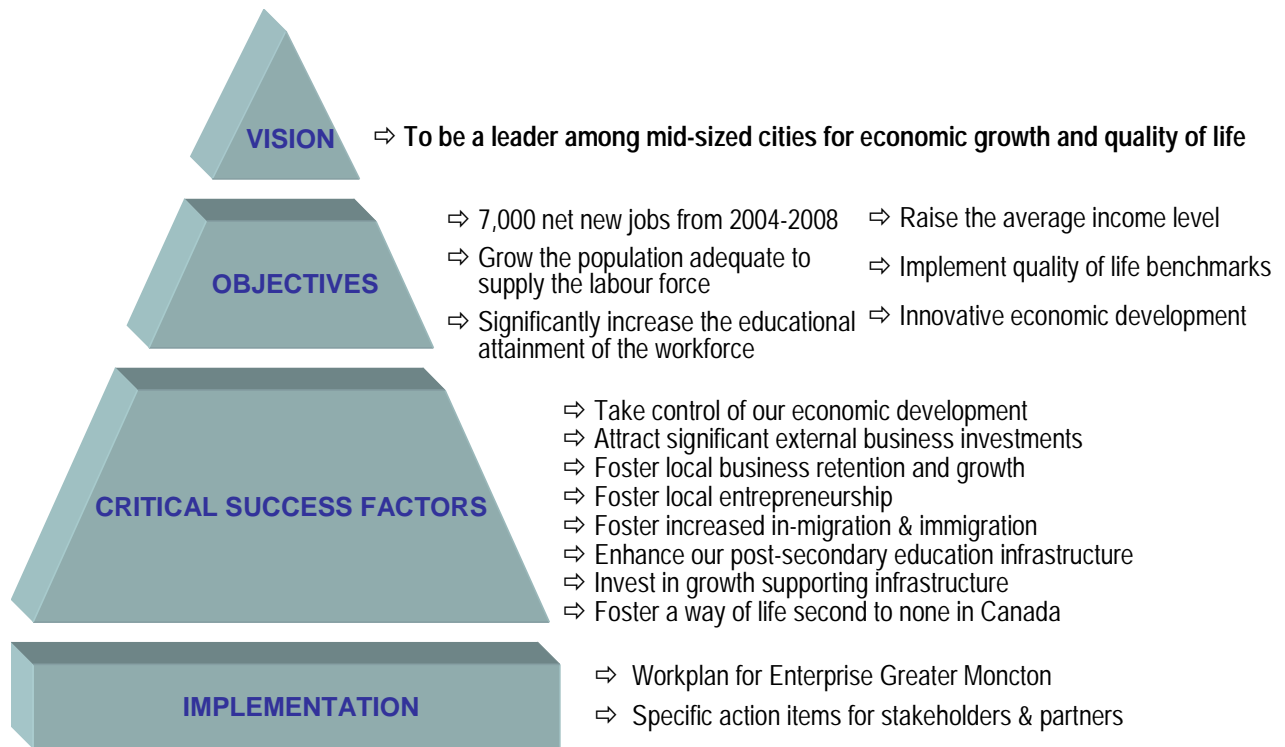


Figure 6

### 3.2 The Vision

At the core of the strategic plan is the vision for the economic development of the community. Based on the public consultations, interviews with key business, government and community leaders as well as the sector round tables, it is clear that the stakeholders want Greater Moncton to continue its strong economic growth, increase the quality of jobs in the economy and increase the level of educational attainment in the workforce. In addition, it is also clear that Greater Moncton should not sacrifice a high quality of life to achieve its economic goals.

The Vision is:

**For Greater Moncton to be a leader among mid-sized cities for economic growth; the creation of high quality employment; educational attainment in the workforce; and quality of life.**

### 3.3 Community Vision Statement

Greater Moncton is a Canadian success story. Rich in history, culture and economy; we are proud of our heritage, and optimistic about our future. Greater Moncton continually strives to be the most strong, healthy, aggressive and vibrant place to live and do business in Canada.

Greater Moncton continually works towards:

- building on core strengths;
  - diversifying our economy;
  - fostering local and external partnerships; and,
  - communicating a message of confidence and success.
- 
- **Building on core strengths:**  
Greater Moncton is a vibrant forward thinking community with inherent strengths in its geographical location as the heart of the Maritimes; in its people, and its culture. Steeped in history as a warehousing and distribution centre; Greater Moncton has built on its strengths to become known for its capabilities in several key and emerging sectors. Proud of its successes, Greater Moncton looks to the future with a strong understanding and appreciation for its past. We will continue to build on our strengths of location, people, culture and growing economic base.
  - **Diversifying our economy:**  
Greater Moncton will grow its economy, by continuing to diversify the economic base. We are committed to evolving along with the Global Economy. Greater Moncton is a community comfortable with the concepts of competition, innovation and alliances. Our people understand and value the fact that we must constantly find better and more efficient ways of doing business. We must be at the forefront of innovation and global competitiveness. Greater Moncton will evolve its economy to be a leader on a global stage.
  - **Fostering local and external partnerships:**  
Greater Moncton is a confident community that is not threatened by the formation of relationships that enhance or compliment our efforts towards continued growth and prosperity; we know that strategic alliances will leverage our inherent strengths. We will continue to foster partnerships with local companies, governments and agencies; as well as extend these partnerships to external companies, governments and agencies. Alliances such as the Greater Moncton Strategic Partnership, Atlantica and partnerships with national and international groups will assist us to remain leading edge in our thinking and approach; as well as provide us with an increased confidence and ability to compete in a global marketplace.
  - **Communicating a message of confidence and success:**  
Greater Moncton will continue to innovate in its delivery of a message consistent with being the most strong, healthy, aggressive and vibrant place to live and do business in Canada. We will explore new ways of leveraging public and private partnerships to enhance marketing initiatives with focused, multifaceted, targeted and strategic marketing campaigns. The message will evolve as Greater Moncton continues to grow its economy; celebrating and promoting our success.

### 3.4 Objectives

In order to achieve the vision set out above, objectives have been developed for the community to target and to allow the stakeholders to have measurable outcomes to test the success of the strategic plan.

Objective:	Rationale:
1. To support the creation of 7,000 net new jobs from 2004-2008.	Based on the consultation process, it was felt that the community should sustain the levels of growth exhibited in the past few years. It is important to point out that economic development agencies do not create jobs. Businesses and organizations in the community create jobs. However, it is the view of EGM and its stakeholders that there are specific, tangible steps that the community can take that will support the creation of new jobs including: community promotion, labour force development, infrastructure and quality of life enhancements.
2. To grow the population adequate for the needs of the labour market.	Greater Moncton attracted thousands of new migrants from other parts of Canada over the past 10+ years to fuel the needs of the labour market. It will be even more important to attract Canadians and immigrants to the community over the next five to support the job creation goal as the unemployment rate has dropped to below 6%.
3. To significantly increase the educational attainment of the workforce.	An educated workforce will be one of the main drivers of economic growth into the future. Greater Moncton has a lower rate of university graduates in its workforce compared to many of its peer group of communities. In addition, there are shortages emerging among key trades occupations. Greater Moncton must take deliberate steps to increase the post-secondary educated workforce by increasing the capacity of the education infrastructure and attracting/fostering new job creation that require post-secondary education.
4. To raise the average income levels by attracting high value jobs.	Greater Moncton saw a decline in real average family income from 1991 – 2001 (adjusted for inflation). There is a strong sense among the stakeholders that a priority should be placed on attracting higher value jobs to raise overall income levels.
5. To develop and implement a series of quality of life benchmarks.	Traditionally, proximity to markets, raw materials or operating costs drove site selection decisions. In the 21 <sup>st</sup> century, the new thinking is that access to an appropriate workforce will dominate the decision making process. Therefore, Greater Moncton <i>must</i> be a community that people will move to and needs to constantly strive to be a desirable location to live.
6. To be an innovator in economic development thinking, strategies and tactics.	The practice of economic development has undergone a fundamental shift in the past decade. Competition, technology and government trends have shifted the playing field. Greater Moncton needs to be a community that understands these emerging trends and is able to quickly integrate them into its economic development practice.

### 3.5 Critical success factors

To achieve the objectives laid out above, there are six factors that are critical to the success of Enterprise Greater Moncton and its stakeholders as they strive to meet the vision. It is important to point out that these critical success factors are not the 'workplan' for Enterprise Greater Moncton. Rather, they are the principles upon which EGM's workplan will be developed. However, many of the critical success factors require other organizations to take ownership and have accountability for outcomes (for example in the areas of health, education and community services).

CRITICAL SUCCESS FACTOR	STRATEGIC ACTION AREAS
1. <b>Take control of our economic development</b>	<ul style="list-style-type: none"> <li>• Increase the level of local and regional collaboration</li> <li>• Be an innovative leader in local economic development practices</li> </ul>
2. <b>Continue to attract significant external business investments</b>	<ul style="list-style-type: none"> <li>• Aggressively promote the community nationally and internationally</li> <li>• Develop a wide network of international stakeholders such as site selection consultants, Canadian consulate officials, etc.</li> <li>• Focus on specific industry sectors</li> <li>• Leverage other levels of government</li> </ul>
3. <b>Foster local business retention and growth</b>	<ul style="list-style-type: none"> <li>• Engage local businesses in the economic development process</li> <li>• Look for early warning signals</li> <li>• Support local businesses in transition</li> <li>• Foster a culture of R&amp;D and innovation among our companies</li> </ul>
4. <b>Foster local entrepreneurship</b>	<ul style="list-style-type: none"> <li>• Establish ongoing dialogue with the community's entrepreneurs</li> <li>• Support activities designed to encourage entrepreneurship</li> <li>• Help identify capital sources</li> </ul>

Figure 7

**CRITICAL SUCCESS FACTOR****STRATEGIC ACTION AREAS****5. Develop programs to foster increased in-migration & immigration**

- Closely monitor local labour market requirements
- Collectively promote employment opportunities regionally/nationally
- Establish best in class relocation/settlement activities
- Use universities & colleges as catalysts for immigration

**6. Significantly enhance our post-secondary education infrastructure**

- Increase the level of post-secondary students and graduates
- Increase the range and capacity of post-secondary offerings
- Take steps to ensure an adequate supply of trained trades workers

**7. Invest in growth supporting infrastructure**

- Support the growth strategy of the Greater Moncton Intl. Airport
- Ensure adequate supply of business and industrial park space
- Invest in specific 'anchor' assets such as a convention centre
- Be more proactive about a wider range of infrastructure

**8. Foster a way of life second to none in Canada**

- Foster a vibrant arts and cultural community
- Work to ensure a quality health care system
- Position Greater Moncton as a healthy lifestyle community
- Work to ensure a quality education system – from K to university
- Benchmark against the best mid-sized cities in Canada for quality of life

Figure 7 (cont.)

## 3.5 Critical success factors

### Critical success factor #1: Take control of our economic development

- **Rationale:**

Strong leadership, locally and provincially, has played a significant role in Greater Moncton's economic success over the past 10-15 years. With the new national focus on urban regions, this is a unique time for Greater Moncton to champion new ideas and models for urban development among Canada's mid sized urban regions.

- **Strategic Action Areas:**

- **Increase the level of local and regional collaboration**

- Municipal-level cooperation and collaboration. This has been critical to the community's success in recent years.
- Regional economic development initiatives such as Atlantica.
- Increase collaboration in the education sector within Greater Moncton and regionally on pan-Atlantic economic development issues.

- **Be an innovative leader in local economic development practices**

- Adopt leading edge techniques to attract new business investment.
- Be an innovator in the use of the Web to promote Greater Moncton and to facilitate relationships with external stakeholders.
- Engage and support the local business community with innovative approaches to attracting new business investment and organic economic development.
- Develop a research capacity that provides timely, accurate and comparative research that allows the community to make evidence-based decisions.

## **Critical success factor #2: Attract significant external business investments**

- **Rationale:**

Greater Moncton's economic growth during the 1990s and early 2000s has been fuelled in large part by external business investment into the community. This investment primarily came in the form of setting up business establishments such as call centres, IT centres, warehousing facilities and retail stores. It is vitally important for Greater Moncton to continue a significant level of business investment attraction to sustain its growth.

- **Strategic Action Areas:**

- **Aggressively promote the community nationally and internationally**

- The latest ACOA research confirms that Atlantic Canada is at the bottom of the list for awareness as a region for site location among U.S. corporations..
- Raise awareness among corporate decision makers in Canada, the U.S. and in key markets abroad.
- Leverage partnerships to gain access to a wider audience.

- **Develop a wide network of international stakeholders to enhance business investment attraction**

- Work with its regional partners, governments and other stakeholders to promote Greater Moncton to key influencers.
- Develop ongoing relationships with key influencers in the area of business investment (consultants, Canadian consulates, business networks). In addition, seek out expatriate New Brunswickers that are now senior managers in national and international firms.

- **Focus on specific industry sectors to attract companies and investment to the community**

- Provides a focus to the message. Most research shows that general (non industry specific) messages are not as well received as industry specific promotion.

- **Work closely with provincial and federal partners to leverage their activities into business investment into the community**

- The government of New Brunswick has a small team dedicated to attracting business to the province. They have been focusing their efforts elsewhere in recent years.
- The Federal government, through ACOA, has increased their foreign direct investment attraction activities and are also focusing on an 'urban agenda'.

### **Critical success factor #3: Foster local business retention and growth**

- **Rationale:**

Greater Moncton has a vibrant local business community made up of regional offices, manufacturers and services companies. Much of the growth in the future will come from these companies. However, in recent years, several high profile companies have either downsized or closed (examples: SunLife, COM DEV, BKM). It is vitally important for Greater Moncton to support its business community.

- **Strategic Action Areas:**

- **Engage local businesses in the economic development process**

- Many of our businesses are headquartered elsewhere. It is vitally important to have the local managers (and at the head office) involved in our economic development activities so they realize the impacts (positive or negative) of their decisions.
- Support these businesses during times of transition (positive or negative).

- **Look for early warning signals**

- Implement a rigorous media monitoring process to keep abreast of major impending decisions that affect local operations (i.e. national firm downsizing).
- Be in continuous contact with major employers in the community and have them share in advance potential decisions (positive or negative).

- **Support local businesses in transition**

- Develop a list of ways that Enterprise Greater Moncton can assist local firms during transition (positive or negative).
- Work with them on transition strategies (positive or negative). Provide support, data, information, attend meetings, etc. – at the request of the company.
- Lobby, where appropriate, other levels of government to support the firms.

- **Foster a culture of R&D and innovation among SMEs**

- Support research and development incubation such as Genio.
- Build linkages between the cultural and creative community and the business community to stimulate creative and innovation thinking.
- Encourage partner organizations to increase support of R&D in the region.

## **Critical success factor #4: Foster local entrepreneurship**

- **Rationale:**

Greater Moncton has benefited from a strong culture of entrepreneurship. For example the manufacturing sector, which is dominated by local entrepreneurs, saw its employment base grow by over 67% from 1991 to 2001 while declining in Canada as a whole. It is clear that the entrepreneurial climate in Greater Moncton must be fostered to achieve a balanced mix of external and locally generated economic growth.

- **Strategic Action Areas:**

- **Establish a formal process for ongoing dialogue with the community's entrepreneurs**
  - Keep on top of emerging issues of importance to local entrepreneurs.
  - Help address ongoing issues related to markets, supply of labour, etc.
  - Lobby on behalf of local entrepreneurs where appropriate.
- **Support activities designed to encourage entrepreneurship**
  - Support and lead initiatives that encourage entrepreneurship (i.e. Rising Stars program).
  - Provide innovative counseling and support services to entrepreneurs.
  - Foster a culture of R&D in the region and support potential spinoff companies.
- **Work with provincial and federal partners to find ways to increase access to national and international capital sources for the community's entrepreneurs**

## **Critical success factor #5: Foster increased in-migration and immigration**

- **Rationale:**

Greater Moncton has been able to attract thousands of people to the community from across Canada to supply its growing labour market. However, the low unemployment rate in the community and the stagnant population growth in New Brunswick is putting even more strain on the labour market and may inhibit our ability to sustain economic growth into the future.

- **Strategic Action Areas:**

- Closely monitor local labour market requirements and communicate these requirements to national and international sources of labour
- Position Greater Moncton as a welcoming place for new residents and have appropriate mechanisms in place to support relocation into the community
- Encourage Greater Moncton's university and post-secondary institutions to act as catalysts in support of attracting migrants from other Canadian provinces as well as immigrants
- Develop an immigration strategy specific to the needs of Greater Moncton

## **Critical success factor #6: Significantly increase our post-secondary education infrastructure**

- **Rationale:**

Greater Moncton is behind many of its peer communities for a number of education-related metrics including: percentage of the population with a university degree; percentage of students in the community; the percentage increase in the educational attainment of the workforce from 1991-2001. Skills and education are at the heart of the 21st century economy. Greater Moncton must foster a culture of education and skills development in order to sustain its economic growth.

- **Strategic Action Areas:**

- Take deliberate steps to increase the level of post-secondary students and graduates in the community
- Increase the range of post-secondary offerings in the community.
- Encourage the community colleges to work more closely with the business community to ensure a trained supply of workers for skilled trades and manufacturing positions

## **Critical success factor #7: Invest in growth supporting infrastructure**

- **Rationale:**

Greater Moncton's transportation and communication infrastructure has long been an integral part of the community's economic development. Its education and R&D infrastructure has led to the development of numerous successful entrepreneurs. It is critically important for the community to invest and support key infrastructure that can be leveraged for economic growth.

- **Strategic Action Areas:**

- Continue to proactively support the growth strategy of the Greater Moncton International Airport
- Ensure that the community has ample business and industrial park space to accommodate strong economic growth
- Invest in specific 'anchor' assets such as a convention centre
- **Be more proactive about a wider range of infrastructure**
  - In the 1990s, the focus on economic development infrastructure was around industrial/business parks, stadiums, etc.
  - While these continue to be important, the thinking now is more around a wider range of issues such as a community's livability (parks, recreational activities, cultural activities) as well as its tolerance, acceptance and support of migrants/immigrants.
  - Social & community infrastructure is a key differentiator in 21st century economic development.

## **Critical success factor #8: Foster a way of life second to none in Canada**

- **Rationale:**

In the last century business investment occurred primarily where there was access to raw materials, proximity to markets or lower business costs. In the 21<sup>st</sup> century, business investment will occur in communities where there is access to an abundant supply of educated, skilled and creative workers. Greater Moncton must be a community that attracts these types of people.

- **Strategic Action Areas:**

- **Foster a vibrant arts and cultural community**

- Recent research confirms a strong correlation between economic growth and a healthy arts and cultural community.

- **Work to ensure a quality health care system**

- Consistently, one of the top criteria for people moving to a new community is the access to and quality of the health care system.

- **Position Greater Moncton as a healthy lifestyle community**

- Walking/biking trails, recreational facilities, etc.

- **Work to ensure a quality education system – from kindergarten through to university**

- Another key feature of communities that are growing strongly is the access to and quality of the education system.

- **Benchmark Greater Moncton against the best cities in Canada for quality of life and work toward the best in class**

## 3.6 Targeted Industry Sectors

Note: for more information on these sectors, please see the Towards A Vision report in Appendix A.

- **Criteria for Targeted Industry Selection**

Greater Moncton must have some differentiable advantage in the sector

*or*

Building the capacity to compete in the sector is achievable in a short time frame

*and/or*

Must be a sector in strong growth mode

### 3.6.1 Business Process Outsourcing

Attraction of external companies and growth from existing firms

Includes both corporate support and information technology functions

**Rationale for selection:**

- Proven track record in the sector
- Differentiable benefits such as a bilingual workforce, competitive costs, access to skilled labour, etc.
- Broad consensus among the stakeholders

### 3.6.2 Niche Manufacturing

Mostly growth from existing companies with secondary focus on attraction of new firms

Includes areas where the community has current strengths

**Rationale for selection:**

- Manufacturing is growing here while declining elsewhere
- Have a variety of specific strengths in food, wood and precision machining-related manufacturing
- Have a competitive cost environment (in North American context) for the manufacture of time-sensitive goods

### 3.6.3 Aerospace sector

Attraction of specific anchor companies to support the growth of the industry

Support aerospace sub-contracting activity among Greater Moncton's manufacturers and service providers.

**Rationale for selection:**

- The aerospace sector has been a major growth engine in Nova Scotia and PEI. The dynamics are similar in this region.
- While the short term prospects are limited, the longer term potential is significant.
- ACOA has made this a priority sector for growth.

### 3.6.4 Life Sciences/Regional Health Industries

Niche opportunities in the life sciences sector

Regional hub for a broad range of health services for Eastern New Brunswick and Northwestern Nova Scotia

#### Rationale for selection:

- Some activity development in the life sciences area
- Proposed medical school would act as catalyst
- Highest concentration of health workers in New Brunswick

### 3.6.5 Transportation/distribution sector

Identify potential new regional warehousing opportunities

Support the growth of our locally based transportation sector

#### Rationale for selection:

- The industry has been growing strongly
- The new four-lane highway infrastructure could open up new regional warehousing potential
- Cargo activity at the airport has been growing strongly

### 3.6.6 Information Technologies

Not including outsourced IT functions (covered under BPO)

Focus on a mix of attracting new firms and supporting local growth

#### Rationale for selection:

- A number of successful IT firms already in place (Whitehill Technologies, Dovico, etc.)
- Major IT departments within our major employers (i.e. Atlantic Blue Cross Care, Assumption Life, government, etc.)
- Demonstrated ability to attract IT workers from outside the region
- Competitive operating cost environment
- Relatively low turnover among employees in the IT sector

### 3.6.7 Language industries

Growing nationally but hasn't in Greater Moncton

Focus on a mix of attracting new firms and supporting local growth

#### Rationale for selection:

- A strong pool of local translators (French/English)
- Language-related research at the University de Moncton
- Some e-Learning capacity in the region
- Competitive cost environment

### 3.6.8 Creative & cultural industries

Focus on a mix of attracting new firms and supporting local growth

**Rationale for selection:**

- These industries are growing nationally and in Greater Moncton
- They provide a wider benefit as they lead to a more creative and innovative workforce
- There is a strong desire among the stakeholders to focus in this area

## 4. Supporting Documentation

Appendix A: The facilitated strategic planning session - summary

Appendix B: Business leader interviews – summary

Appendix C: Education round table – summary

Appendix D: Health care round table – summary

Appendix E: Arts & culture round table – summary

Appendix F: Towards a Vision – A research document in support of the strategic planning process

Appendix A:  
The facilitated strategic planning session - summary

## Overview

On January 6, 2004 more than fifty business & community leaders met with Enterprise Greater Moncton to provide collective input towards the development of an overall vision for the region's continued economic growth.

The session ran for the full day and was facilitated by Kevin Saville, partner with the Ottawa-based Sussex Circle. Kevin was an ideal choice as he is a fluently bilingual facilitator who has successfully developed integrated policy, program and organizational renewal approaches for a number of employers and clients.

The session included:

- A statistical review of the Greater Moncton economy
- Four separate breakout workshops
- A final plenary session to develop agreed upon guiding principles for the strategic plan that will guide the economic growth of the Greater Moncton region

### Workshop 1: General trends

This workshop assessed the external context in which the economy of the Greater Moncton area must develop and grow. The objective was to understand the impact of these trends and define guiding principles that will enable Greater Moncton to grow its economy successfully in this new environment.

#### Some general trends included:

- The move toward more aggressive local foreign direct investment attraction
- A changing business incentives environment
- The national urban agenda
- Trend towards global outsourcing
- Economic trends – appreciating Canadian dollar
- Geographic markets
- Regional partnerships (i.e. Halifax-Moncton Growth Corridor)
- Culture and creativity are becoming economic drivers

### Workshop 2: Local issues/gaps

This workshop evaluated local market issues that will impact the economic development of the Greater Moncton region. The objective was to address these issues and gaps leading to the definition of guiding principles for the strategic plan.

#### Some critical local issues include:

- Industrial/office building stock
- Lack of average income growth
- Education gap with peer group communities
- Migration/immigration
- Lack of access to start up/risk capital
- Transportation infrastructure: airports, roads

### Workshop 3: Targeted Sectors

This workshop evaluated specific industries that could drive economic growth in the Greater Moncton region and which ones should be targeted for specific initiatives to support growth. Some specific sectors identified in the background research that are expected to grow strongly are listed in the table:

- Business process outsourcing
- Certain niche manufacturing
- Biotechnology/life sciences
- Arts/cultural/creative industries
- Health industries
- Marketing/public relations
- Information technologies
- Tourism
- Government services
- Language industries
- Other

For each sector reviewed, participants evaluated the following considerations:

- Is it a forecasted growth industry (i.e. expected to generate a significant amount of new economic activity and jobs in the next few years)? *If no, are there still opportunities for Greater Moncton?*
- Do we have core strengths? *If no, what are the gaps that have to be overcome - relative to the effort required?*
- Do we have a track record? (i.e. is this sector growing in Greater Moncton?) *If it is a growth industry and we have core strengths, why is the sector not growing in Greater Moncton?*
- Sub-sector review: general industry strengths or only in targeted sub-sectors?
- Growth from: organic sources (local companies)
- Growth from: inward investment
- Where is the competition (local, North America, international)? What is the degree of competition?

## Guiding Principles coming out of the facilitated session

There were four broad guiding principles for economic development that came out of the facilitated session. The majority of the attendees believed that these guiding principles would be critical for the growth of the Greater Moncton economy over the next five years.

1. **The attraction of new investment opportunities.** The business and community leaders agreed that Greater Moncton must continue to be a magnet for external business investment. The growth of the community over the past decade or so was driven, in large part, by external business investment attraction in sectors such as call centres, information technology, manufacturing and warehousing/distribution.
2. **The refinement of in-migration strategies.** Greater Moncton has successfully attracted thousands of migrants from other regions in New Brunswick and Canada in recent years and this in-migration has supported the growth of the labour force and the economy. There was a strong feeling among the group that Greater Moncton should be more proactive about attracting people to the region both from other regions of Canada and international immigrants.
3. **Increased post-secondary education.** Greater Moncton is below many of its peer communities such as Fredericton, Halifax, Charlottetown and St. John's for the percentage of its workforce that have a university degree. It was strongly felt that Greater Moncton should take deliberate steps to increase the level of university educated workers in the labour force. There are two broad ways to achieve this: 1) increase the capacity for students at local universities – It is a statistical fact that cities with large university populations have a higher percentage of university-educated workers in the labour force; and 2) attract and foster higher quality job creation that requires university educated workers.
4. **The need for strong leadership at every level, including better cooperation between the three local municipalities.** This was the most dominant theme of the day. There is a pervasive feeling among business and community leaders that the three municipalities need to work more closely together and present a unified approach to regional economic development.

Appendix B:  
Business leader interviews/round table – summary

## **Overview:**

As part of the strategic planning process, ShiftCentral interviewed leading business people in the community. In addition, the Chair of Enterprise Greater Moncton convened a round table of key business leaders. The goal was to assess their impression of the current state of the Greater Moncton economy and provide insight into growth drivers for the next few years.

## **Interviewees:**

- **Yves Doucet, CEO** - Dovico Software/aAlso director, Atlantic Blue Cross Care
- **Stephen Palmer, COO** - Whitehill Technologies/also Chair, Greater Moncton Knowledge Industry Network
- **Yvon Fontaine, Recteur** - Université de Moncton
- **Robert Irving, President** - Irving Tissue/Personal Care; Midland Transport; Midland Courier; Cavendish Farms; Cavendish Agri-services
- **Wes Armour, President** - Armour Transportation Services
- **Gaston Losier** - Gautreau Machine Shop
- **Stephen Stultz, President** - Apex Industries

## Summary considerations:

- **On Greater Moncton's strengths:**
  - The committed, bilingual, low turnover, high work ethic workforce.
  - People have a 'can do', optimistic attitude.
  - Our regional status as a hub for the Maritime Provinces.
  - Our closeness and understanding of the U.S. market.
  - Our entrepreneurial spirit.
- **On Greater Moncton's weaknesses:**
  - Difficult to attract certain highly skilled workers from outside the region.
  - Deficient air transportation links.
  - The province's declining population will ultimately affect our ability to grow.
  - We are starting to see shortages of labour in both non-skilled and skilled positions.
  - Greater Moncton companies for the most part still lack good marketing skills. One respondent stated that marketing skills are 'very hard to come across'.
  - Greater Moncton companies are still not getting enough federal government contract work.
- **On leadership:**
  - There seems to be a lack of leadership locally and provincially in the area of economic development.
  - One respondent stated "we need to keep the harmony and the spirit of our community".
  - There is less cooperation between the three municipalities and this will ultimately hurt the community's growth.
- **On the key factors required to generate economic growth:**
  - Greater Moncton needs to be a welcoming community for migrants and immigrants. One respondent stated that the 'time is right for immigration'.
  - There needs to be a continued focus on training trades people to support the growth in manufacturing and other trades-related industries.
  - Economic development agencies should work more closely with existing firms to help them grow.
  - There is almost no access to capital for small but growing firms. This is a major barrier to entrepreneurial development.
  - The three municipalities should play a more active role in economic development through tax incentives, etc.
  - R&D needs to be better adapted to the existing industrial base.

- Greater Moncton's cultural and creative industries must be fostered to nurture an innovative environment.
- Greater Moncton needs to define itself in broader terms as a regional (i.e. southeastern NB) hub and even as a major influence in the Atlantic Canadian economy. For example, Mount Allison University should be part of 'Greater Moncton'.
- The community needs to continue to enhance its quality of life infrastructure (parks, arenas, sports, etc.).
  
- **On specific industries:**
  - The IT sector is in trouble. Many companies have closed in recent years.
  - Greater Moncton needs to promote itself as a 'near shore' outsourcing location for both service and manufacturing sectors.
  - There are tremendous opportunities within the transportation/distribution sector. However, cross-border problems are limiting this potential.
  - There is still potential for the manufacturing sector to grow here.
  
- **General:**
  - Greater Moncton's bilingualism was stated by all respondents as a key benefit for the community. However, it was stated that the issue needs to be 'sensitively managed' and that 'civility' must remain.
  - Greater Moncton needs to have formal mechanisms to where academic, political and business leaders meet to pursue common goals. Ongoing round tables or committees may be the best way to achieve this.

Appendix C:  
Education round table – summary

## Overview:

The education round table was held to bring key stakeholders from the education community into the economic development strategic planning process. A number of statistics that were developed in the Towards a Vision report (Appendix F) revealed warning signs related to the education attainment of the workforce in Greater Moncton including a lower than average university-educated workforce, a significantly lower base of student population in the community and the recent closure of several high profile private sector training institutions.

Some specific questions covered during the session included:

- The research suggests a widening of the gap between university educated Francophones (increasing) and Anglophones. This is probably a testament to the positive role that U de M is playing in the community.
- Does Greater Moncton require increased university opportunities for its Anglophone students? If so, what are the options to increase Anglophone university students in the community?
- The research found that a number of private colleges have closed in Greater Moncton in the past few years.
- Is this a natural shakeout or has the community lost an important component of its post-secondary education infrastructure?
- Are there gaps between the types of skill sets that are coming out of university/colleges and the requirements of industry? Are there better ways to rectify these gaps?
- The research suggests that, in general, Greater Moncton has a lower percentage of post-secondary students than many of its peer communities across Canada.
- Does this put pressure on the retail and services sector that relies on student labour? Should Greater Moncton be attempting to increase its overall student population?
- The research revealed a strong growth in trades employment over the past decade (manufacturing, transportation/warehousing sectors).
- Is there an adequate supply of new graduates to support the growth in trades activity over the next five years?
- Should we be encouraging people to take up trades-related careers?
- The research found that Greater Moncton has not had much success attracting immigration and there is concern that the supply of migration from other parts of New Brunswick is beginning to dry up. Also, Greater Moncton has one of the lowest percentages of international, post-secondary students of its peer communities in Canada.
- Is there a role for the education sector to play attracting students from across Canada and internationally?
- Following the previous question, what innovative projects or value-added activities could the local post-secondary education community undertake to be more attractive and enhance capacity? (i.e. medical school, architecture school, other).

## **Summary considerations:**

Most of the attendees to the round table felt that there needs to be better linkages between the education community and industry requirements.

Several felt that there should be a formal process for the education community and business leaders to interact and share ideas.

U de M is beginning to attract French Immersion graduates which will provide another option for Anglophones in the local market.

Appendix D:  
Health care round table – summary

## **Overview:**

Greater Moncton has benefited from a strong population growth in recent years. However, there is evidence that family physicians are still in very short supply and that the provincial government will not issue new billing numbers. In addition, the Fujistu report found that Greater Moncton had the longest wait times for specialists. There is unanimous agreement that access to health care is one of the most important, if not the most important, feature of a community when trying to attract people to move here. The health care round table was held to bring the key stakeholders in the industry into the strategic planning process for the economic development of the community.

## **Summary considerations:**

There needs to be better dialog between EGM and the hospitals. They should share information for promotion and doctor recruitment.

Some suggested that we need to have and promote a wellness strategy for the community.

There was broad agreement that a medical school is not necessarily required in the community. Building better relationships with existing medical schools may be a more effective solution.

Some suggested that a two-tier system for health care was inevitable and that Greater Moncton should look at attracting private sector providers of health care-related services. The community is already strong in this area with firms such as Clinidata and Atlantic Blue Cross Care.

There was also agreement that Greater Moncton could be a hub for telehealth applications for the province and beyond.

## Appendix E: Arts & culture round table - summary

## Overview:

The arts & culture round table was held to engage key stakeholders in this sector in the strategic planning process. One major objective was to determine if we can profile and better understand this sector and its role in the local community. In addition, are there specific sectors (areas of activity) such as sound, film, animation, etc. that the community should focus on to support economic development. Other topics discussed included:

- Should we encourage better linkages between the arts/culture community and industry?
- Are there private foundations? How to sever dependence of government?
- Should the community be working towards creating a specific education capacity to support the arts/culture sector (i.e. a design school, cooking school, architecture, etc.)?

## Attendees:

- Isabelle Mckee-Allain, doyenne, Arts et Sciences sociales, U de M
- Thaddeus Holownia, doyen du département. des arts visuels, Mount Allison University
- Marc Chouinard, directeur, Théâtre Capitol
- Brenda Orr, Ville de Moncton
- Marie-Claire Paulin, Centre culturel Aberdeen
- Dawn Arnold, présidente du conseil, Festival Northrope Frye
- Larry Nelson, Chef de la direction, Lounsbury
- Colin Thornton, Click Communications
- Francis Coutellier, Théâtre l'Escaouette
- Suzanne Calmers-Gauvin, Ballet de l'Atlantique
- Guy Lévesque, Consultant
- Jeanne-Mance Cormier, Musée Acadien, U de M

## Summary considerations:

It was mentioned from the start that the round table should have simultaneous translation and better representation from the multicultural communities.

The initial conversation was around the definition of the arts sectors, who's in who's not. Is Spielo in because they hire a lot of designers, etc? There were divergent opinions on this but the overall sense was that the sector needs to be more inclusive, so we better link the issues facing the arts to the other economic development issues as a whole.

It was mentioned that a key component to help shape better understanding of the sector was to teach the arts at the earliest age in public schools.

Private sector involvement in the arts was considered critical. For some, the private sector was sufficiently involved and supportive of the arts. For others, there is a lot of involvement but it is not necessarily well known, i.e Lounsbury's, Spielo, Grant Thornton, etc

The arts sector, to thrive, also requires a vibrant downtown. *Creative people move around a lot.* We need amenities and infrastructure to attract them. We should invest more in cultural tourism. This is deemed essential.

We must do a better job at documenting the cultural sector. How many jobs, how many artists, how many companies. There are metrics that now exist (i.e. Richard Florida's Creative Cities, etc).

The arts sector must also do a better job at marketing and promotions. We need broader media coverage of events (mostly on the anglophone side) and overall better coverage of the arts scene here and of the artists from here having success elsewhere.

Cultural activities must be part and parcel of the city's promotional activities. We could do better job at measuring the economic impact of cultural activities such as counting the number of visitors, etc.

We still need to update the city's cultural policy.

### **Recommendations:**

Entreprise Greater Moncton should set up a permanent structure of broad representation to integrate the arts sector into the overall economic development strategy.

The arts and cultural sector must be defined in a broad and inclusive fashion. We must do a better job at interacting with other sector of activities, both public and private.

We must increase our knowledge of the arts by increasing research projects to provide insight in these activities and their impact on the overall economy. This could include a list of private sector champions.

The sector must do a better job at promoting itself and the activities to general media but also to other stakeholders (governments, institutions EGM, etc).