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1 INTRODUCTION

1.1 PURPOSE

This Business Development Strategy for the Town of Sackville has been prepared in support of Sackville Town Council's 2017-2021 Strategic Plan, which called for economic and community development leadership that would contribute to the future prosperity of Sackville.

1.2 METHODOLOGY

The research conducted in preparing the Strategy consisted of a literature review, compilation of economic data from statistical agencies, key informant interviews and a survey of local businesses that attracted 40 responses. Interviews were conducted both in-person and by telephone between November 2018 and January 2019. The survey was made available online during this same period. This engagement program allowed the consulting team to identify strategic priorities and proposed initiatives and partnerships. The Literature, data sources and personal communications are noted in Chapter 5.

1.3 REPORT STRUCTURE

Chapter 2, Planning Context, provides a description of the Town's current and past approach to economic development.

Chapter 3, Economic Overview, presents a synopsis of the local economy, based on the economic data in Appendix A.

Chapter 4, Strategy Recommendations, outlines strategic actions the municipality and its partners can take to achieve a healthy and sustainable local economy.

Chapter 5, References, includes literature and data sources as well as a list of personal contacts.

Supporting research in the Appendices include economic data (Appendix A), economic development SMART Practices (Appendix B) and survey results (Appendix C).

2 PLANNING CONTEXT

2.1 ORGANIZATIONAL STRUCTURE

Currently Sackville engages in both Investment Attraction and Business Retention and Expansion activities. On a staff level, these activities are managed primarily by the Senior Manager of Corporate Projects (SMCP) and the Manager of Tourism and Business Development (MTBD). The Chief Administrative Officer (CAO) assists in Investment and Business Attraction efforts as required.

The Mayor is also involved in economic development in his leadership role as Mayor and public promoter of the Town.

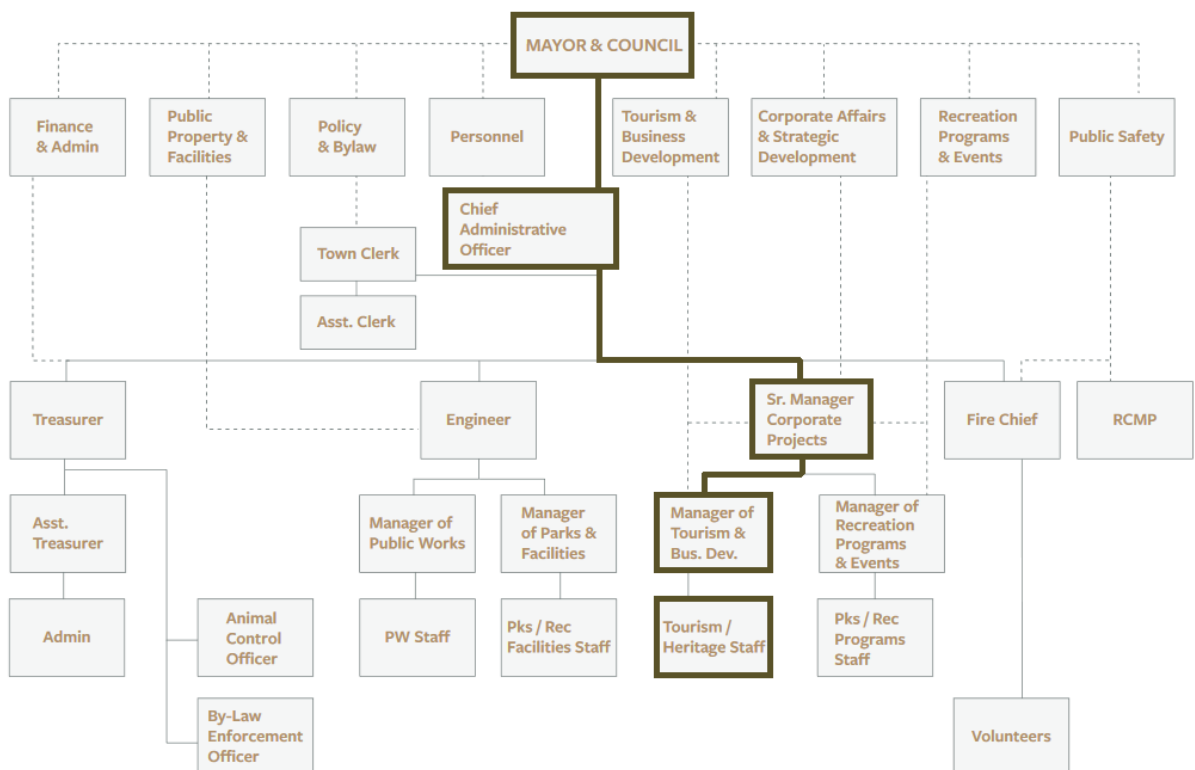
Figure 1 Town of Sackville Organizational Chart

Organizational Chart

(as per December 2013)

Liaison Councillors, Department Heads and staff
(August 2014)

Sackville
NEW BRUNSWICK



2.2 CURRENT ECONOMIC DEVELOPMENT ACTIVITIES

2.2.1 Investment Attraction

The SMCP is the lead for Investment Attraction and the point contact for Opportunities New Brunswick (ONB). Other municipal resources and partnerships that the SMCP leverages in this role include the CAO, the MTBD, Mt. Allison University (MTA) leadership, the Southeast Regional Service Commission (SRSC) Planning Department, (ONB), Renaissance Sackville and local business organizations and people.

The Town has been actively involved in the attraction of several significant investment initiatives in the last two years, including CamTran and Terra Beata. In these and other opportunities, it has worked to locate property, match opportunities with local partners, sell municipal land, assist with regulatory and environmental processes, provide municipal records to avoid the need for duplicate studies, and provide support and assistance with rezoning.

2.2.2 Business Retention and Expansion

The Town of Sackville views supporting, retaining, and helping local business grow to be as important as their business attraction activities. The MTBD is the lead for Business Retention and Expansion (BRE) programming and also manages the Visitor Centre including tourism staff. The MTBD:

- Facilitates regular contact with, and supports, local business organizations;
- Utilizes business organizational networks to facilitate communication with the Town, such as Mainstreet Redevelopment Inc., Start-up Sackville and the Exit 506 Group.
- Organizes annual familiarization tours (FAM) tours;
- Organizes Business Development Workshops and other programs such as Business of the Month (Town of Sackville, 2017); and,
- Engages in one-on-one meetings with local businesses.

Sackville has been engaged in other, informal BRE activities in recent years with a specific focus on tourism-related businesses, but has taken note that the current methodology and practice may not adequately serve businesses less related to tourism. Specifically, businesses that are less public are served informally through established personal relationships between the MTBD and SMCP which likely results in the concerns of some businesses or sectors being lesser known to the Town.

Sackville currently supports small and medium-sized enterprises through its financial support of Renaissance Sackville (Renaissance), a not-for-profit organization whose mandate is to offer

funds to local initiatives that support their mandate which is to ensure that “... Sackville is a vibrant, economically & environmentally responsible... community.” (Renaissance Sackville, 2017) Sackville currently provides Renaissance with \$25,000 in annual funding (down from \$50,000 in previous years (Burke, 2018)) which Renaissance in turn utilizes to support several small businesses with seed grants and community-based economic development initiatives with project funding. A recent example of Renaissance’s activity is their support for Bagtown Brewery which is an excellent example of local entrepreneurship and economic development that the Town and Renaissance both seek to encourage.

Despite successes like Bagtown, Renaissance has been experiencing difficulty in recruiting board members and maintaining enthusiasm (engagement) for their work.

2.2.3 Performance Measurement

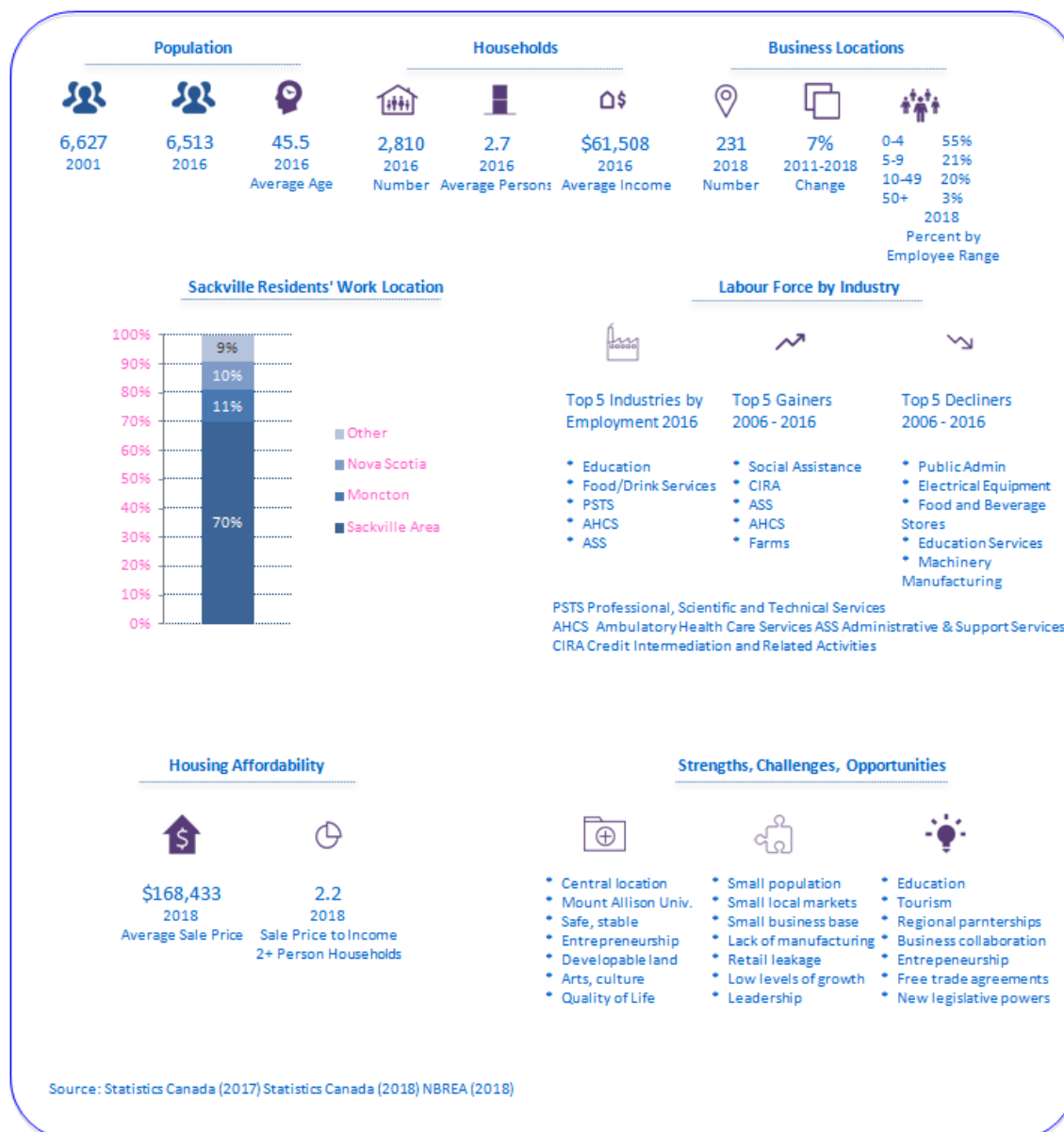
Sackville’s strategic plan outlines a number of suggested metrics to track performance in “Economic and Community Development and Leadership”. The Town reports annually on Tourism and Economic Development projects and achievements in a public presentation. The presentation included quantitative measures such as a list of major initiatives undertaken, expenses and number of visitor guides distributed and qualitative descriptions of activities such as increased collaboration with Mount Allison and increased representation on local and regional tourism and business development boards and committees.

3 OVERVIEW OF THE CURRENT SITUATION

3.1 SOCIO-ECONOMIC SNAPSHOT

As illustrated in Figure 2, the population of the Sackville Area (i.e. town and parish) remained relatively stable between 2001 and 2016, versus growth of about 2.4% for New Brunswick. The average age of residents is 45.5 years. The average size of a households is 2.7 people, while the average income in 2016 was over \$61,500. The majority of resident workers have a workplace in either the town or parish, but 30% commute outside the area, primarily to Moncton and Nova Scotia.

Figure 2 Sackville and Area Socio-Economic Snapshot



The economic base grew modestly between 2001 and 2016, with most of that growth in the service sectors, which offset job loss in goods production, especially manufacturing, which declined by 25%. Manufacturing declined at a similar pace across the entire province during this period so the relative performance by Sackville has not changed much. The top industries by employment are educational services, food and beverage services, professional, scientific and technical services, ambulatory health care services¹ and administrative and support services.

3.2 PROVINCIAL ECONOMIC DEVELOPMENT PRIORITIES


3.2.1 New Brunswick Provincial Target Sectors and Value Proposition

Provincial priorities and targets for economic development and investment attraction are noted in Figure 3. In addition to these priorities, ONB will match opportunities and clients to any New Brunswick community's value proposition and will help companies "hire the top local and international talent [they] need to support [their] sector" (Opportunities New Brunswick). Existing Sackville businesses fall within these target sectors such as Moneris (Financial Services), Manufacturing (CamTram) and Food and Beverage (Terra Beata). Sackville's largest employer, Mount Allison University, also offers many programs that influence and support all ONB Target Sectors.



¹ Includes physicians, dentists, many health care practitioners, outpatient care centres, lab services and home health care services.

Figure 3 ONB Target Sectors

<p>CyberSecurity</p> <p>New Brunswick is actively supporting the development of a world-class cybersecurity hub with a strong talent pipeline.</p>	<p>Financial Services & Fintech</p> <p>New Brunswick's financial sector, including financial services and fintech, includes more than 5,000 establishments.</p>	
<p>Manufacturing</p> <p>New Brunswick's manufacturing sector has a world-class reputation. [NB] companies leverage state-of-the-art technologies and processes in the aerospace, defence, forestry, mining, marine, and oil & gas industries.</p>	<p>Business Service Centres</p> <p>World-class brands such as ExxonMobil, Purolator, and UPS are locating their business service centres in New Brunswick.</p>	<p>Cannabis</p> <p>Licensed cannabis producers in New Brunswick have access to top research and development.</p>
	<p>Food and Beverage</p> <p>A diverse array of offerings including wild blueberries, cranberries, potatoes and French fries, salmon, nut butters, spices, maple syrup, candy, and craft beer are some of the products putting New Brunswick on the map.</p>	<p>Information Technology</p> <p>New Brunswick's vibrant Information Technology sector is varied, with strengths in geomatics, ocean tech, digital health, SaaS, and telecommunications.</p>

Source: Hammond (2018)

3.3 STRENGTHS AND OPPORTUNITIES

The Town of Sackville has significant economic development strengths compared to many small Atlantic Canadian communities. It is located in the Greater Moncton area, one of the strongest growth centres of the region with excellent access to the other Maritime provinces via 4-lane highways. It is in close proximity to the Greater Moncton Roméo LeBlanc International Airport and also near to the largest Airport in the region: Halifax Stanfield International Airport.

Mount Allison University, Canada's highest rated under-graduate institution, is in the centre of Sackville and its employment and procurement activities are a major economic force. Sackville is also known "a community rich in arts and culture" (Burke, 2018, pers. comm.) with a strong sense of place and quality of life based on sustainability principles. The Town has curated a strong and cohesive brand that helps promote the community to students, visitors and investors.

A network of partners, including the Southwest Regional Service Commission, ONB, CBDC Westmoreland, and MTA, deliver a suite of business and economic development services. Emerging initiatives such as Sackville Commons and Start-up Sackville are supplementing this network with innovative programs and services. These building blocks create opportunities for a more robust region-wide approach to economic development that other parts of the country are pursuing.

Moving forward, there are numerous challenges that require action. The small population and business base means more leadership, networking and innovation will be called upon to increase traded activities and build a more resilient and growing economy so existing and potential residents have a reason to build a future in this community.

Opportunities exist in many sectors, primarily education, health and professional services and tourism including arts and culture. Table 1 outlines some specific opportunities identified during the consultation process for this strategy.

Table 1 Current Sackville Business and Investment Opportunities

Opportunity	Notes	Potential Actions
Retail and Highway Commercial Development	<p>While retail is not a focus area for ONB it is a strength for Sackville and an important part of the local economy. Sackville's location remains a strength in a constantly changing retail environment.</p> <p>The Exit 506 report identifies a number of opportunities in Highway Commercial.</p> <p>While RioCan REIT retreats from Canada, other investors such as Fredericton based Plaza Retail REIT are taking advantage, buying up properties such as the Quispamsis town centre in December of 2018 (Wood, 2018).</p>	<p>Create a prospectus for specific areas of Sackville for distribution to realtors, developers, franchise representatives, or regional investors.</p> <p>Utilize the exit 506 report as a starting point.</p> <p>Consider the development of a Retail Market Analysis focused on Sackville to discover market gaps.</p>
Accommodation	<p>Multiple stakeholders including Mount Allison representatives identified a market gap in the quantity of accommodations in Sackville, as well as a need for higher end venues. MTA not only generates a market for this segment of the market, it finds the absence a hindrance to its own business, as it affects the University's brand and has been inconvenient for visiting professors, parents, or conference attendees who stay in Moncton or Amherst (Inglis, 2018, pers. comm., Public Consultation Session, October 2018).</p> <p>Closing this gap is a business opportunity itself, and an effective way to capture more local spending using existing market generators.</p>	<p>Consider the development of a feasibility study that can be used to support the marketing of, and investment in, the accommodation sector with independent third-party information. A publicly funded study benefits the town by enabling existing business people and potential new entrepreneurs to both see the metrics and opportunities available in the local market. In addition, a public process is more likely to consider factors of less importance to investors but of greater importance to the community.</p> <p>Investigate funding support for this study through sources such as the CBDC's Consultant Advisory Services (CAS) Program.</p>
Private International Education	<p>While important collaborative efforts between MTA and the Town will and should continue to ensure the community remains attractive to new domestic and international students and staff alike, those same efforts will serve to make the community attractive to international parents of younger students as well.</p>	<p>Develop a prospectus to showcase Sackville as a desirable location for an international boarding school.</p>

	<p>The Sackville 2020 initiative, though facing challenges currently, shows strength and support for the education sector in lower grades as a whole in the community.</p> <p>The recent announcement of a Gordonstoun School for Annapolis County, Nova Scotia is an example of this kind of investment and is led by New Brunswick developer Edward Farren (Patil, 2018). International demand for a safe, high-quality, Canadian grade-school education appears to be growing in other parts of Canada.</p>	<p>Include “Private School” as an opportunity in the Community Profile.</p>
Workforce Education and Training	<p>There has been an almost unbroken discussion of education reform in New Brunswick policy circles going back decades. Whether K-12, post-secondary or vocational there is constant scrutiny given to improving student achievements, work place preparedness and other educational outcomes. Importantly, there has been no meeting of minds on how best to link the education system to workforce development, and by extension, the much broader case for community economic development.</p> <p>How different learning styles, collaboration networks and technologies, as examples, might improve student outcomes that support entrepreneurship as well as social and economic innovation may provide guidance for communities like Sackville that have strategic assets to work with but also an overwhelming need to attract and retain the creative class of the future.</p>	<p>Consider an Innovation in Education Steering Committee, with representation from MTA, the Department of Education, other service providers and the business community, to create a multi-level approach to workforce development in Sackville.</p> <p>Remain informed, and engaged when necessary, with the Anglophone East School District and Sackville Schools 2020 group on workforce development and related educational reform and collaboration opportunities.</p>
Transportation and Logistics	<p>Sackville and its immediate neighbors – Greater Moncton and Amherst – together host a successful and growing transportation and logistics sector.</p> <p>Terra Beata and Camtran are both success stories whose investment decision to choose Sackville – though supported and encouraged by efforts by the Town, Southeast Regional Service Commission, ONB and others – is primarily rooted in Sackville’s location, available workforce, and excellent transportation infrastructure.</p>	<p>Actively seek out opportunities to connect with the value chain of existing transportation and logistics companies in Sackville to determine if there are more opportunities.</p> <p>Ensure adequate employment lands with highway access are available and market-ready for future development.</p> <p>Consider facilitating the development of an additional un-serviced and potentially “green” business park on Exit 500</p>

Green Development, Green Energy, and Social Enterprise	<p>Sackville’s culture and reputation is firmly rooted in environmental concern, social impact, and community values.</p> <p>These are business “themes” more than sectors for small communities, but an important differentiator that needs to be owned and reflected in the Value Proposition.</p> <p>This theme is showing continued strength as global investments grow in green energy, successful social enterprises, co-ops and community owned ventures are showcased in business and broader media channels, and younger generations continue to embrace sustainability in ever increasing numbers.</p>	<p>Ensure green-friendly regulations are showcased as a business opportunity.</p> <p>Work to market Sackville as attractive to green developments and investment rather than opposed to traditional industry.</p>
Health and Senior Care	<p>Sackville’s Value Proposition is in alignment with factors sought out by retirees and investors in health care and retirement services. The hospital, walkable community, feeling of a small-town community with more cultural activities than most other towns of its size are all strengths that Sackville enjoys.</p> <p>Some communities in Atlantic Canada – such as New Glasgow NS – are seeking to capitalize on the opportunities a “silver economy” presents, even as they acknowledge the challenges that an aging population brings.</p> <p>The Economic Base Analysis (Appendix A) shows continued growth in the health care labour force over the last 15 years and the Shift-Share Analysis (Appendix A) shows a local competitive effect for health care. This indicates that Sackville is already benefiting more from this industry than other communities, and can be successful in growing it in the future.</p>	<p>Ensure age-friendly and accessibility improvements are explored in regular policy and bylaw reviews.</p> <p>Work to market Sackville as an attractive place for healthcare and seniors’ developments and investment, showcasing existing success stories and personal anecdotes from recent retirees who have moved to the community.</p> <p>Develop a prospectus to showcase Sackville as a desirable location for new health-care or senior focused developments.</p>

4 STRATEGY RECOMMENDATIONS

4.1 SACKVILLE'S VALUE PROPOSITION

A value proposition is helpful to encapsulate key strengths of a community to new potential investors and also to existing businesses making decisions to remain or expand in the community. Following is a value proposition crafted from strengths and opportunities noted during consultations. A value proposition can't be "right" or "wrong". The following suggestion is not necessarily the one that Sackville will continue, but it can serve as a starting point.

Sackville, a community rich in education, arts, recreation and culture within the Greater Moncton Area, has the strategic property locations, lower land costs, quality of life and skilled workforce that businesses need to grow in Atlantic Canada.

4.2 GOALS

The following goals are intended to guide the economic development activities of the Town over the next three years. They are based on a review of previous planning documentation in the area, the business survey and interview results and the consulting team's interpretation of the community's economic potential. They touch on each of economic development's key dimensions, people, place and business.

- Quality, sustainable jobs for residents and newcomers;
- Vibrant, growing business sector, with a focus on export activities²;
- Educated and entrepreneurial work force; and
- Strong Quality of Life that makes the community attractive to live in.

² Why the focus on Export? A BDC Study from 2017 says it well: "Firms that venture beyond their home territory tend to be more productive, allowing them to pay higher wages and earn bigger profits than companies focused entirely on the domestic market." (Corner, 2017). While provincial and federal programs focus on increasing firms' export capacity and activity generally, local representatives can ensure local businesses are aware of opportunities, and that the right local businesses are connected to the right assistance at the right time to maximize the benefit to Sackville. Without local assistance and advocacy, programs and assistance often gravitate to larger centres with companies that enjoy better exposure or stronger business networks.

4.3 IMPLEMENTATION

A strategy is only successful if it is implemented, and it can only be implemented if there are resources (human, financial and organizational) with which to do so. When local government is considering how to advance an economic development program, it must make decisions about the type, magnitude and duration of resources that can be reasonably committed to the process. Such decisions are not easy because resources are scarce, being limited by the taxation capacity of the community and by the demands of other, sometimes competing, service areas. An additional concern for small communities is that there may be not be enough demand to justify establishing internal delivery capacity. For example, a typical economic development office in Canada requires a minimum of \$120,000 annually to support professional, full-time services. Unless this money is sustainable on an ongoing basis, a community is better off foregoing a dedicated office or function, and searching out more achievable methods of delivery. Perhaps as importantly, the amount of resources will affect what may be reasonably expected of a strategy, specifically the anticipated outcomes and how they will be measured. Fewer resources would understandably be linked to fewer outcomes, and vice versa, the more capital to be invested the greater the expected return.

In light of these considerations, the following guidelines can be used to frame the recommendations that follow:

- Additional staffing resources are not necessary to implement the recommendations of this strategy if current staff and volunteer levels and commitment remain constant, and adequate time is allotted. Should an accelerated pace be preferred, a staffed economic development function could be explored.
- Incremental resources will be required for supporting specific initiatives, but these can be assembled on an as-needed basis from internal and external sources;
- The primary internal responsibility for implementation will reside with the SMCP;
- Annual work plans should be prepared, using the strategy as a higher-level guide; and
- The strategy is an organic document—it is not meant to be static or unchanging and annual work plans may identify new opportunities and initiatives providing they contribute to the goals of the strategy and of the community.

4.4 MAYOR'S ROUNDTABLE COMMITTEE

4.4.1 Sackville Mayor's Roundtable Committee on Economic Development

It is recommended that a **Mayor's Roundtable Committee on Economic Development** be established to facilitate co-operative implementation of the Business Development Strategy, and specifically in the services noted in Table 2.

The Roundtable Committee can harness the required administrative and political support of the Town of Sackville, and the energy of the many community groups already engaged in economic and business development in Sackville.

Multi-stakeholder participation in the Roundtable Committee will enable consistent efforts over time, and demonstrate the sustainability and stability of support that businesses seek when making investment decisions in Sackville. Existing services can be better coordinated and aligned, such as those provided by ONB, the CBDC, Startup Sackville, Renaissance Sackville, Mainstreet Redevelopment Sackville Inc., and Mt. Allison University, and new services can be introduced at the appropriate time and with the support of all parties.

Currently, business people may not be aware of the available business development services in the community, and even if they are, they may have trouble accessing them because of a lack of time, lack of information or limited access to the sort of hands-on assistance that would

encourage greater utilization of existing services.

The service providers themselves struggle to maintain outreach and delivery because of funding and other resource constraints. Some, for example, experience serious challenges retaining a full complement of volunteers and board members required to provide organizational stability.

The Mayor's Roundtable Committee would help to tackle these challenges collectively.



The Sackville Commons Co-op
(Photo credit: coworkersackville instagram account)

Table 2 Co-ordinated Services to be Jointly Supported by the Mayor's Roundtable Committee on Economic Development

Co-ordinated Economic Development Service	Future / Existing / Expanded / Consolidation	Purpose of the Roundtable Committee	Potential Service Lead (Organization that delivers the Service)
Startup Support	Existing	Ensure new entrepreneurs or contacts are directed to a single point for the best startup support.	Startup-Sackville
Grant Intake	Consolidated	The Roundtable Committee would establish a single point of contact to serve as the starting point for all Sackville-based grant opportunities, such as the current Renaissance Sackville grants. It would maintain a list of other opportunities and provide a "warm introduction" to other organization such as the CBDC, ACOA, or ONB where appropriate.	To be determined.
Incubator Program	Expanded	Explore further collaboration with Sackville Common program, MTA's R-Peace, Sackville 2020, Sackville Farmers Market (as an agri and craft business incubator). NEW: Support the establishment of a new student business accelerator program in collaboration with MTA and in alignment with MTA's experiential learning initiative.	Sackville Common / Mount Allison University
Business Retention and Expansion (BRE) Program	Expanded	Facilitate and fund BRE training for key individuals to increase knowledge and capacity. Formal training from BREI, EDAC, IEDC, other partners or private providers is recommended. Leverage informal program run by the MTBD to formalize and deliver an annual Business Retention and Expansion (BRE) program. A BRE program is an organized survey and visitation program that seeks to strengthen and empower existing businesses in a community, increase the likelihood of their growth and expansion, and reduce the possibility of their relocation to another	Town of Sackville

		community. A BRE program harnesses local businesses' networks to amplify marketing and communications efforts and increase the attractiveness of Sackville to other companies in local business's supply chains or spheres of influence. See Appendix B for details on BRE programs.	
Investment Attraction	Expanded	Members of the Advisory Group would connect clients to the Town's current Investment Attraction Services through the SMCP and OpportunitiesNB.	Town of Sackville, ONB

4.4.2 Roundtable Committee – Planning and Reporting

The Mayor's Roundtable Committee should be responsible for collaborating to implement this Business Development Strategy.

To that end, it should develop an **Annual Workplan** that plans specific progress towards the recommendations contained in:

- The Economic Development priorities of the Town of Sackville Strategic Plan; and
- The Town of Sackville Business Development Strategy.

Further, it is recommended that the annual reporting already publicly delivered on Tourism and Economic Development projects and achievements (as mentioned in section 2.2.3), be expanded to include progress of the Mayor's Roundtable Committee as a whole, and include some or all of the Indicators shown in Table 3.

Table 3 Suggested Tracking and Indicators for Regular Reporting

Type of Indicator	Source(s) of Information	Potential Annual Goal	Other Notes
Business Climate	Atlantic Business Confidence Index	No goal as this is not locally controlled. Monitor only.	ONB, Chamber or others could lead.
Business Climate	BRE Program	No goal as this is not locally controlled. Monitor only.	Issue tracking required. Specific issues requiring tracking may emerge.
Awareness	Website Statistics (Sackville.com or	Target to be set after a review of the website analytics of the business	

	other partner websites)	section of the website or other partner websites.	
Local Businesses Helped	BRE Program	30 Businesses Purpose-visited.	
Business Attraction Service	All Members of the Roundtable	10 Businesses helped that are interested in locating to Sackville.	Information sharing system required.
Businesses Started, Expanded, or Attracted	All Members of the Mayor's Roundtable Committee	2 Businesses whose start, expansion, or re-location to Sackville can be directly associated with the efforts of the members of the Mayor's Roundtable Committee	
Business or Industrial Park Land Sold	Town of Sackville	1 lot or 0.5 acres of Municipally-owned land.	Goal could be expanded to include other lands with partner agreement.
Capital Investment	Town of Sackville Building Permits	To be determined. Must be limited to investment clearly associated with efforts of the Roundtable members.	
Jobs Announced	BRE Program	To be determined. Must be limited to investment clearly associated with efforts of the Roundtable members.	Requires long-term tracking as jobs often appear years after initial efforts conducted.
Annual Workplan	Roundtable	100% Completion of Annual Workplan	

4.4.3 Roundtable Committee – Future Potential

In the future, the Roundtable Committee may grow into a more formal arrangement with greater responsibility. Should that be the case, financial support from other levels of government such as the Federal Government, the Province, and the Southeast Regional Service Commission to participate in the near or long term.

A more formal partnership or organizational structure should be considered at that time, including closer regional collaboration with other communities in Southeast New Brunswick to ensure funding and program sustainability, and also encourage continued collaboration in business attraction service delivery going forward.

4.5 GRANT SUPPORT

4.5.1 Current Sackville Grants via Renaissance Sackville

Sackville currently makes grants available, through Renaissance Sackville, to local ventures that advance economic development. In addition, Renaissance administers a Façade Improvement Program within the Business Improvement Area and the Town also has \$15,000 in its operation budget to support our Heritage Grant program. To maximize the effectiveness of these grants in their economic development impact, **Grant criteria** should be developed so that they can be used to adjudicate applications for assistance. It is further recommended that the Town consider engaging partners familiar with business plan evaluations, such as CBDC Westmoreland, to evaluate grant applicants for eligibility and award on a point-score system. Potential criteria are shown in Table 4.

Table 4 Potential Economic and Business Development Grant Criteria

Criterion	Consideration
ONB Priority Sector	Preference to business ventures that align with OpportunitiesNB priorities.
Sackville Value Proposition	Preference to business ventures that align with Sackville's Value Proposition and Goals, Corporate Strategy, or Business Development Strategy.
Business Plan	Preference to ventures with high quality Business Plans (as determined by qualified persons).
Social Innovation	Preference to business concepts that show social innovation, as per the recommendation of the Report of the Atlantic Growth Strategy Subcommittee on Innovation. (DeCoursey, Casey, Fillmore, & Whalen, 2017 pp 5,16)
Location	Preference to businesses within certain geographic areas to promote the physical development of the areas deemed most in need of private sector investment.
Key Partner Program Alignment	Preference for proposals in alignment with other programs and initiatives, such as a future MTA Enterprise Development Program.

4.5.2 New Granting Powers: Section 104 of the Local Government Act

Though new granting powers under Section 104 of the Local Government Act are available, the Town should explore the use of **additional incentives** only after the establishment of grant criteria as above, the adoption of a Value Proposition building off that suggested in section 4.1 and after the development of investment attraction tools in section 4.7.

It is important to understand the associated limitations, challenges and risk. Theoretically, incentives meant to attract investment can work if they enhance the internal rate of return of a potential development project. Companies weighing investment decisions across different locations will factor grants, tax rates and other local business costs into their cash flow analyses and decide which one provides the best return, providing it exceeds its cost of capital (Donovan and Corbishley, 2016). Municipal incentives can play a role in rendering a positive investment decision by lowering business costs, or risk, or both. In some cases, incentives may render a non-viable or marginal project viable.

There is considerable controversy, however, regarding the underlying efficacy of incentives and their bottom-line effect on both investment decisions and community benefits. An incentive granted to a project can be wasted if the investment would have occurred in any case. The literature is replete with incentives being misused and abused. A study published by the World Bank Group in 2010 titled: “The effectiveness of tax incentives in attracting investment: panel data evidence from the CFA Franc zone” (Van Parys and James, 2010) found that there was little positive relationship between tax incentives and investment decisions in the 12 countries studied.

Interestingly, the World Bank study did conclude that increasing the number of legal guarantees for foreign investors and reducing the complexity of the tax system helped to attract investment. This conclusion, when translated into the local context of Sackville, suggests that surety and simplicity in local regulations and processes may be more likely to attract investment than additional incentives.

4.6 BUSINESS FACILITATION

4.6.1 Made in Sackville Incubator

The Town of Sackville should work to expand the reach and uptake of **incubation services** currently available to Sackville businesses, and encourage the development of a **Made in Sackville Incubator**.

Business incubators, accelerators, innovation sandboxes and other managed, affordable space connected to business supports and services have grown in popularity in recent years. They are designed to increase the rate of new business creation and success, and are often associated with the high-growth tech sector, as well as significant capital and operating budgets—at least the ones that receive national press attention fit that description. Planet Hatch, billed as “New Brunswick’s flagship accelerator program”, is one of several in Atlantic Canada and “supports high-growth potential start-ups from idea to commercialization and beyond” (Ignite Fredericton, 2019). It receives significant City of Fredericton and New Brunswick provincial

support. In Halifax, the Link Performing Arts Centre, which will include a “creative entrepreneurs centre”, has been announced for development at the former World Trade and Convention Centre. Invest Nova Scotia intends to invest \$2.9 million to “support 10 new office spaces, workshops, and business advisory service” (The Canadian Press, 2018).

The demand and funding for incubators of this scale does not exist in Sackville. Nevertheless, there is no reason similar services and similar results cannot be achieved provided the operating model is smart, realistic and sustainable. Sackville Commons has already created a physical space to support entrepreneurs and enterprise development. It was “started because there was a need to boost and support “very small” 2 to 3 person companies” (Mathis, 2018, pers. comm.). It has provided a physical and social place for companies and businesspeople, and new companies in particular, to call home. The Commons has been carried by strong, grassroots support with a heavy dose of energy and passion provided by committed volunteer base. Though the current model may not be ideal, it could provide the basis of a more sustainable incubator with multi-stakeholder support in the future.

4.6.2 MTA Student Business Accelerator Program

The Town should work with Mount Allison University to investigate the development of a **business accelerator program**. MTA is the largest single employer in Sackville, and the reason over 2,000 students grow the local population for eight months each year. It is proud of its role as “an important social economic driver in the community” (Boudreau, 2018, pers. comm.). MTA’s small size, and the small class sizes it is known for, enables it to be nimble and embrace what it has coined “Experiential Learning” to differentiate itself in a competitive industry and grow its business and student population (Inglis, 2018, pers. comm.).

Funding could be obtained from focused municipal grant and foundations associated with prominent alumni such as the McCain Foundation (Moreira, 2019). Collaboration between the Ron Joyce Business School and Startup Sackville has been informally discussed on a number of occasions (Mathis, 2018, pers. comm.) (MacIver, 2018, pers. comm.). Pursuing this concept is recommended as it is an opportunity that can differentiate Sackville from other towns, and MTA from other universities.

A model similar to that used by St. Francis Xavier University’s Innovation and Enterprise Centre may be possible. Its mandate is to enhance economic sustainability in Northeastern Nova Scotia by promoting innovation, entrepreneurship, and enterprise creation.



4.7 INVESTMENT ATTRACTION TOOLS

As outlined in Table 5, **investment attraction tools** should be developed to assist the Town and its partners to attract and retain new investment, and assist new startups in the community.

Table 5 Investment Attraction Tools for Sackville

Tool	Description
Community Profile	<p>Creation and continuous improvement of Community Profile material to communicate the Value Proposition</p> <ol style="list-style-type: none"> 1. Start by building off the existing Town of Sackville Townfolio profile. 2. Recommend moving to the paid version of Townfolio as the free version is phased out in 2019. 3. Investigate partnering with Ron Joyce Centre to produce an annual succinct and up-to-date Community Profile report, Value Proposition, and land and building inventory report (details in partnership section)
Land, Building, and Lease Space Inventory	<p>Initiate and continuously improve a land, building and lease space inventory. Such an inventory is a key recommendation of the International Economic Development Council to enable community economic development in local communities.</p> <p>Build the inventory by:</p> <ol style="list-style-type: none"> 1. Build off the work that the now-closed Sackville Chamber of Commerce began (Zwicker, 2018, pers. comm.) 2. Collaborate with local real estate to ensure quality and support rather than competition. <p>Use the inventory to:</p> <ol style="list-style-type: none"> 1. Provide an updated version of the inventory twice annually to OpportunitiesNB to allow ONB to connect opportunities to land assets in Sackville; 2. Measure and monitor the availability of commercial land, buildings, and lease space in Sackville against the number of inquiries, and the ability for the Sackville inventory to provide suitable options for those inquiries; 3. Market all or portions of the inventory on the Town of Sackville website; and 4. Make recommendations to the Town of Sackville and Regional Service Commission to ensure an adequate supply of commercial land for business and investment opportunities (See Section 4.9 – Employment Lands)

4.8 PARTNERSHIP DEVELOPMENT

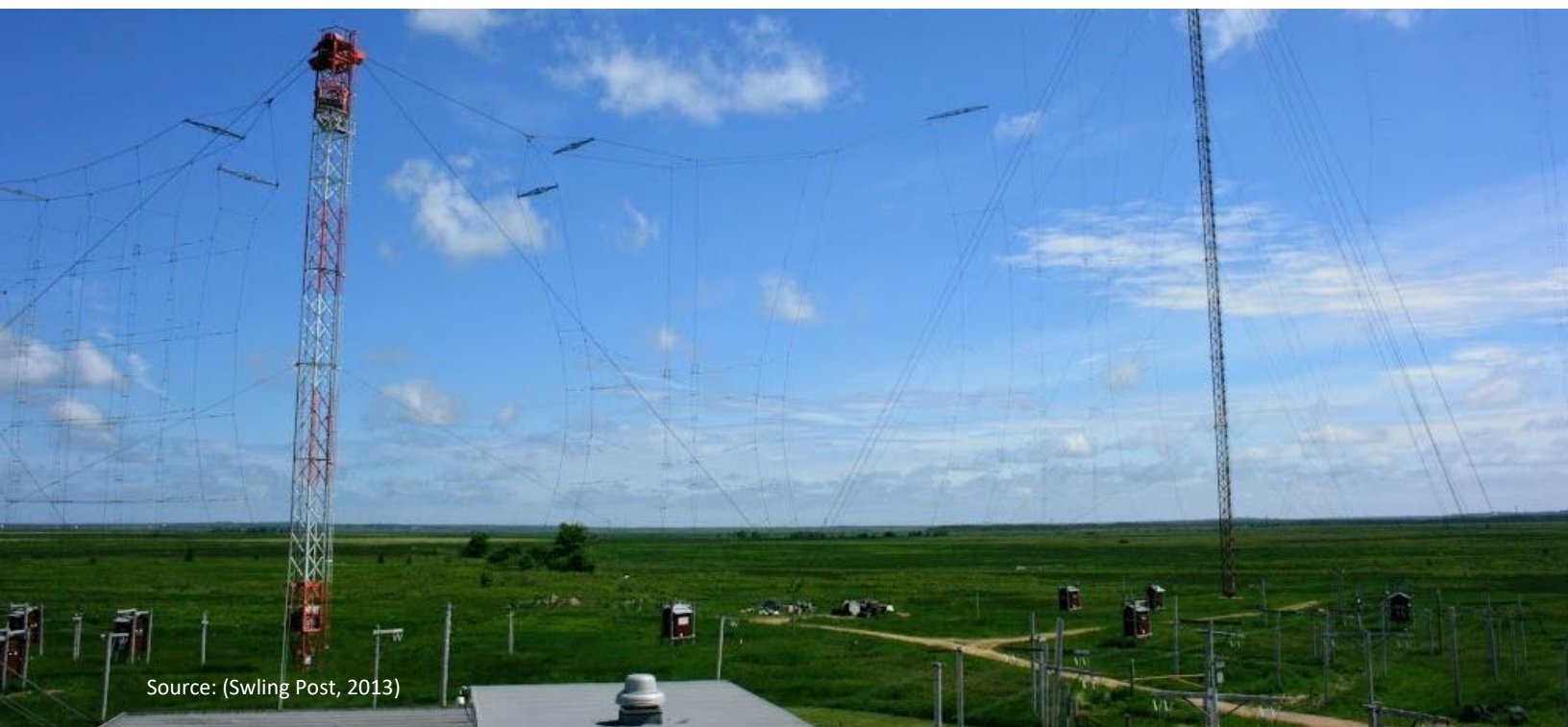
Develop **key partnerships** that will leverage the Town's economic development resources while securing support for overall strategy implementation. The following are key alliances are considered critical.

4.8.1 First Nations-Municipal Community Economic Development Initiative

Mi'gmawe'l Tplu'taqnn Incorporated (MTI) owns the 222-acre former Radio Canada International site located on the east side of Sackville in Westmoreland County (Weldon, 2018). MTI has publicly stated that "whatever is developed on the site must be a good environmental fit" (Weldon, 2018) and that it is not interested in heavy industry damaging the environment around it.

Sackville has an opportunity to grow its relationship with the Mi'kmaq community and to pursue a joint First Nations-Municipal Community Economic Development Initiative partnership. It could be potentially similar to the one struck between Paqtnkek Mi'kmaw Nation, County of Antigonish, and the Eastern Straight Regional Enterprise Network in Nova Scotia.

Figure 4 Former Radio Canada International Site, Westmoreland County



4.8.2 OpportunitiesNB

ONB is focused on seeking out new investment for all of New Brunswick and tailors its efforts around provincial, and regional, strengths (Lund, 2018). Specifically, ONB has collaborated successfully with the Town on recent “wins” for Sackville.

ONB’s team has met with thousands of companies, sharpened its understanding of the investment attraction landscape and developed expertise and connections that the Town and the community could benefit from (Lund, 2018) ONB can help connect Sackville to the companies and investors that match the community’s values and strengths. The Southeast ONB Team provides a full slate of services including labour force attraction, strategic and financial assistance for small business, regular connection with local non-profits and community groups, and business attraction.

Sharing tools and information on a regular basis will enable both parties to collaborate even more closely going forward. ONB will be able to use and apply a Sackville-supplied and up-to-date Community Profile report, Value Proposition, and land and building inventory as described previously in this report. Sackville, in turn, may be able to leverage student work via Mount Allison’s Experiential Learning Initiative (MacIver, 2018, pers. comm.) to regularly produce some of those materials.

4.8.3 Mount Allison University

Tangible projects of mutual benefit often work to strengthen an already strong relationship. The following projects in Table 6 may be of mutual benefit to both parties.



Table 6 Town of Sackville – MTA Potential Joint Projects

Project	Description
Sackville Community Profile	An annual succinct and up-to-date Community Profile report, Value Proposition, and land and building inventory report generated by the Ron Joyce Centre would be useful to Sackville and all its economic development partners including the Chamber and ONB, and a way for those partners to access and better understand research and other potential collaborative opportunities available in the future with the Centre.
Joint Marketing	Mount Allison VP of Finance Robert Inglis noted that as MTA works to succeed and build off its reputation as high-quality undergraduate institution that has produced 55 Rhodes Scholars, it must continuously differentiate to “show how we’re actually different and better”. (Inglis, 2018, pers. comm.). Similarly, public consultation participant and co-owner of Bagtown Brewery Anthony Maddalena noted the cleverness of Sackville’s tagline, “A Different Kind of Small Town”, but asked what really makes it different (Public Consultation Session, Oct. 29 th , 2018)? As the value proposition of both the Town and University are inexorably entwined, increased collaboration to raise awareness of Sackville as a business, education, tourism, and lifestyle destination will be of mutual benefit.
MTA Student Business Accelerator Program	As described above.

4.8.4 Chamber of Commerce

The Town of Sackville should work with the business community and other partner to re-establish a **chamber** in the community. Chambers of Commerce serve as a local business network that establishes policies, advocates for member interests and participates in many community initiatives. Unfortunately, the Greater Sackville Chamber no longer exists, although interest has been expressed over the last two years to have it reborn. There has been acknowledged local advocacy gap on matters of provincial and national interest but at the same time finding the volunteers and the time to reorganize has been challenging.

The Greater Moncton Chamber of Commerce has expressed interest in facilitating the creation a Sackville Chapter of Commerce while the Atlantic Chamber would be willing to facilitate a new chamber. Benefits of a partnership with the Greater Moncton Chamber would include

relative low administrative costs, leveraged volunteer resources and access to services such as employer medical and dental programs and advocacy initiatives.

4.9 EMPLOYMENT LANDS

The Town of Sackville, in partnership with the Southeast Regional Service Commission, should ensure an adequate supply of market-ready greenfield and/or brownfield **employment lands** is available for current and future commercial or industrial demand. In this case market-ready is defined as land that is zoned appropriately for various commercial uses, has access to basic services such water, wastewater, 3 phase power, and high-speed internet.

Further, the availability of these lands, and the potential businesses that could locate on them, should be prominently marketed on the Town of Sackville website and via other means recommended in the forthcoming Sackville Communications Strategy and through effective partnerships. These partnerships can be formal or informal and could be with the private sector or other economic development partners.

4.9.1 Exit 506

The Ekistics Land Use and Functional Planning Study recommends to “capitalize on the momentum of the Exit 506 Land Use and Function Planning Study” (Ekistics, 2018). The Town of Sackville has been responding by investing in the road system and in improving signage. The Ekistics document will be a useful tool that can help jump-start a Land and Building Inventory and the readiness of the site will be a selling point to new businesses poised to take advantage of the site, and businesses already in Sackville who may be compelled to expand in the area.

As a greenfield site with municipal services and excellent highway access and visibility, exit 506 is poised to become another major gateway to Sackville. The Town should continue its efforts to improve the signage in the area, and encourage regional business attraction efforts to focus on developments that enable business activities consistent with its value proposition. The opportunities listed by Ekistics (Ekistics, 2018 p. 19) are consistent with the findings of this strategy.

4.9.2 Sackville Industrial and Business Parks

Though there are few municipally owned properties that remain available for sale in the Sackville Industrial Park, the lands that are available and the Industrial and Business Park lands as a whole should be better marketed as a business destination on the Town of Sackville website. Lot information and prices, pricing policies, and/or sale conditions should be clearly indicated.

As a known presence (made even more known by the Terra Beata structure), the reputation of the Sackville Industrial Park will anchor the future Land and Building Inventory, and will provide an important jumping off point should the Town of Sackville encourage, market, or develop new business park or commercial area land itself in the future.

4.9.3 Exit 500 Future Industrial Area

A significant amount of land near Exit 500 is designated as future business park in the Town of Sackville Future Land Use Map (SRSE, 2015). The area is zoned industrial and though it is near it is outside the current wellfield protection area (Bickford, 2018, pers. comm.). Though there has been no development interest in this area expressed to the Southeast Regional Service Commission in recent memory, this land was first designated in the 2008 bylaw due to a recognition then of the finite inventory of the Sackville Business Park (Bickford, 2018, pers. comm.).

It is recommended that efforts continue to establish a working relationship with the landowners of industrial land near Exit 500 and that any opportunities in this area be included in the future Land and Building Inventory.

4.9.4 Downtown Sackville, Exit 504, and Established Commercial Areas

Affordable and available commercial space for sale and lease is not only available in established commercial areas of Sackville, but it is also desirable from business, community planning, tourism experience and planning perspectives to encourage in-fill and density. It is important that these spaces also be included in the future Land and Building Inventory, and that BRE survey efforts be designed to ensure local intelligence supports the regular update of this inventory for maximum effect.

4.10 MONITORING IMPLEMENTATION

Recommended actions from throughout this Business Development Strategy are consolidated in Table 7 for quick reference.

Table 7 Consolidated Recommendations for Implementation and Monitoring

Section	Action	Timing (yy/yy)	Measures
4.1 – Value Proposition	Finalize and Adopt a Value Proposition for Sackville suitable for broad business development purposes.	19/20	<ul style="list-style-type: none"> • Complete • Adopted by the Mayor’s Roundtable Committee
4.4 - Business and Investment Opportunities	Create a Retail and Highway Commercial Development prospectus for specific areas of Sackville for distribution	19/20	<ul style="list-style-type: none"> • % Complete
	Consider procuring a Retail Market Analysis focused on Sackville to discover market gaps.	20/21	<ul style="list-style-type: none"> • Decision Made or Timeline Established
	Consider procuring an Accommodation Investment Feasibility Study.	20/21	<ul style="list-style-type: none"> • Decision Made or Timeline Established
	Consider Engagement with the Anglophone East School District and Sackville Schools 2020 on workforce development collaborative opportunities and related educational reform.	19+	<ul style="list-style-type: none"> • Decision Made or Timeline Established • Specific Engagement Initiated
	Create a Private Education prospectus for Sackville for distribution and promotional use.	21/22	<ul style="list-style-type: none"> • % Complete
	Target Transportation and logistics companies via the BRE program	See BRE	<ul style="list-style-type: none"> • Same as BRE
	Ensure adequate employment lands are available and market-ready	Ongoing	<ul style="list-style-type: none"> • Acres of available market-ready land.
	Consider development of an un-serviced and potentially “green” business park on Exit 500	22+	<ul style="list-style-type: none"> • Decision Made or Timeline Established
	Ensure green-friendly regulations are showcased as a business opportunity.	Ongoing	<ul style="list-style-type: none"> • # of communications efforts • # of green-friendly development regulations

Table 7 continued – Consolidated Recommendations

Section	Action	Timing (yy/yy)	Measures
Continued: 4.4 - Business and Investment Opportunities	Explore age-friendly and accessibility improvements in regular policy and bylaw reviews	Ongoing	• % of reviews complete with this lens
	Create a health-care or Senior-Focused Development prospectus to showcase Sackville as a desirable location	21/22	• Completion
4.4 - Mayor's Roundtable Committee	Committee Establishment	19/20	• Committee formed
	Committee Terms of Reference	19/20	• Completion
	- Incorporate Sections 4.3 and 4.2		
	Annual Workplan Created	Annual	• Completion
	- Incorporate Sections 4.3 and 4.2		
	Community and Regional Economic Indicators Adopted and Incorporated into existing Performance Management practice.	20/21	• Measures Established • Practice Established • Ongoing Continuous Improvement
	Single Point for Start-up Support Established.	19/20	• Established
	Single Point for Grant-Intake Established.		• Established
	Explore an Incubator Program	21/22	• Decision Made or Timeline Established
	Business Retention & Expansion Program (BRE)		
	• BRE Training for key individuals	19/20	• % Complete
	• Formalize and begin delivery of a regular BRE program for Sackville	20/21	• Program Started
	• Institutionalization and Continuous Improvement of the BRE program	21/22	• Program Established
	Investment Attraction Collaboration	20/21	• Client Tracking System Established • Reporting System Established

Table 7 continued – Consolidated Recommendations

Section	Action	Timing (yy/yy)	Measures
4.5 - Grant Support	Current Sackville Grants	19/20	• Grant criteria enacted
	New Granting Powers: Section 104 of the Local Government Act	20/21	• Incentives further explored, decision made or timeline established.
4.6 - Business Facilitation	Made in Sackville Incubator	21/22	• Service uptake
	MTA Student Business Accelerator Program	21/22	• Service uptake
4.7 - Investment Attraction Tools	Community Profile	20/21	• Completion
	Land, Building, and Lease Space Inventory	20/21	• Completion
4.8 - Partnership Development	First Nations-Municipal Community Economic Development Initiative	19/22	• Partnerships developed and maintained
	OpportunitiesNB	Continue	• New services and programs delivered
	Mount Allison University	Continue	• Chamber re-established in Sackville, potentially as a chapter of the Greater Moncton Chamber
	Chamber of Commerce	19/20	
4.9 - Employment Lands	Exit 506	19/20	• New signage
	Sackville Industrial and Business Parks	20/21	• Land sales and leases
	Exit 500 Future Industrial Area	21/22	• Exit 500 development
	Downtown Sackville, Exit 504, and Established Commercial Areas	Same as Land Inventory	

5 REFERENCES

5.1 ACRONYMS

BA	Business Attraction
BIA	Business Improvement Area (or Association)
BR&E / BRE	Business Retention and Expansion
BRE+A	Business Retention Expansion and Attraction
CAO	Chief Administrative Officer (Town of Sackville)
CBDC	Community Business Development Corporation
CMCP	Manager of Corporate Projects
CRM	Customer Relationship Management
MTA	Mount Allison University
MTBD	Manager of Tourism and Business Development (Town of Sackville)
FAM Tour	(Tourism) Familiarization Tour
ONB	Opportunities NB
Renaissance	Renaissance Sackville
SCO	Strengths, Challenges, Opportunities
SMCP	Senior Manager of Corporate Projects (Town of Sackville)
SRSC	Southeast Regional Service Commission

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5.3 PERSONAL COMMUNICATIONS

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APPENDIX A - THE ECONOMY TODAY

Population

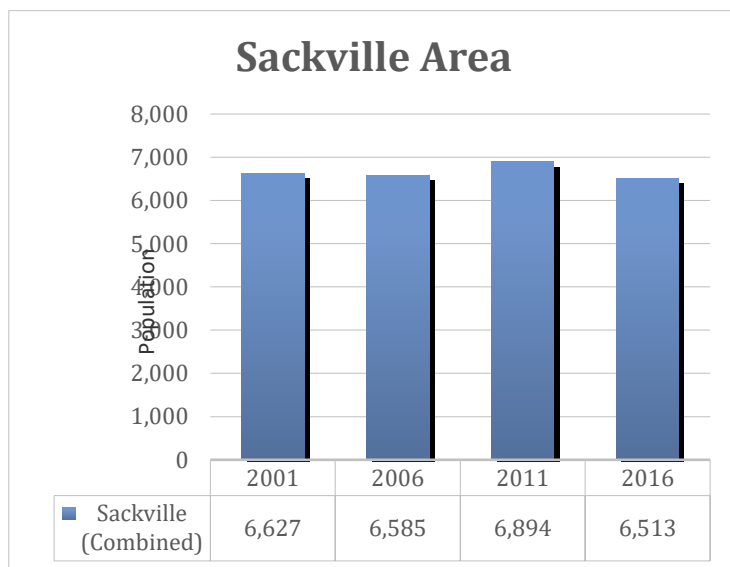
The population of the Sackville area (Town and Parish) has remained stable over the past 15 years. The total population has declined by 1.7% over the period while at the provincial level the population has increased by 2.4% over the same period.

Recent population forecasts to 2031, summarized by NBjobs, imply the following for New Brunswick as a whole:

- The potential for major demographic shifts – primarily driven by provincial out-migration given employment opportunities elsewhere.
- Expected population growth in the three urban centres (Fredericton, Moncton, and potentially Saint John), but population decline for the rest of the province.
- Without policy initiatives, New Brunswick will likely experience low to negative population growth and will continue to face the concern of an aging population.

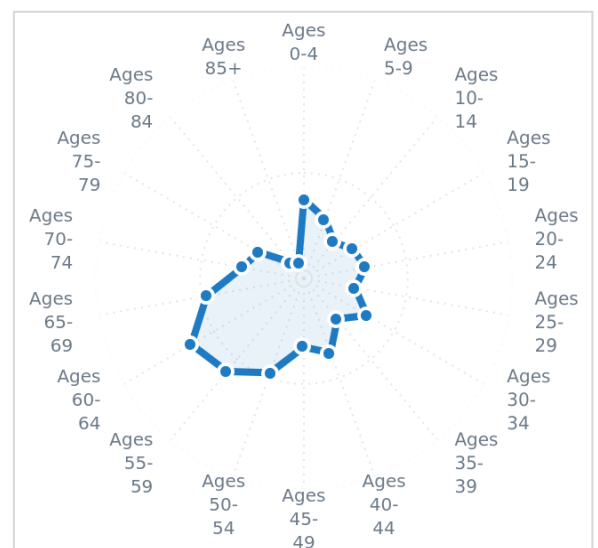
(NBJobs, 2017)

Figure 5 - Population Statistics, 2001-2016



Source: Statistics Canada (2002, 2007, 2012, 2017)

Figure 6 - Age Demographics 2016³



Source: Statistics Canada (2017) Townfolio (2018)

³ A full description of Figure 6 is available on the Townfolio website: <https://townfolio.co/nb/sackville/demographics>

Aging populations are rightly highlighted as a challenge for Atlantic Canadian communities in particular. Sackville is also affected by this as Figure 6 shows. The covered area of Figure 6 is primarily on the left illustrating an aging population, while a community with a covered area primarily on the right would indicate a younger population. However the over 2000 students who attend Mount Allison University - which is part of the community for 2/3rds of each year – is not reflected in the above demographic chart and has a significant impact on the relatively small population of Sackville.

For most businesses, population is of chief importance for workforce development and also for sales for retail and local service providers. Businesses in Sackville are relatively well positioned for the future as part of the growing Sackville commutershed, as they are able to both attract workers from and supply workers to the Greater Moncton region.

Establishment Counts

Table 8 shows establishment counts with employees for New Brunswick, Sackville area (combined Town and Parish) and Westmorland County between 2011 and 2018. The number of establishments with employees has seen incremental growth for Sackville (7%) and the County (8%), whereas the Province experienced a small decrease (-1%).

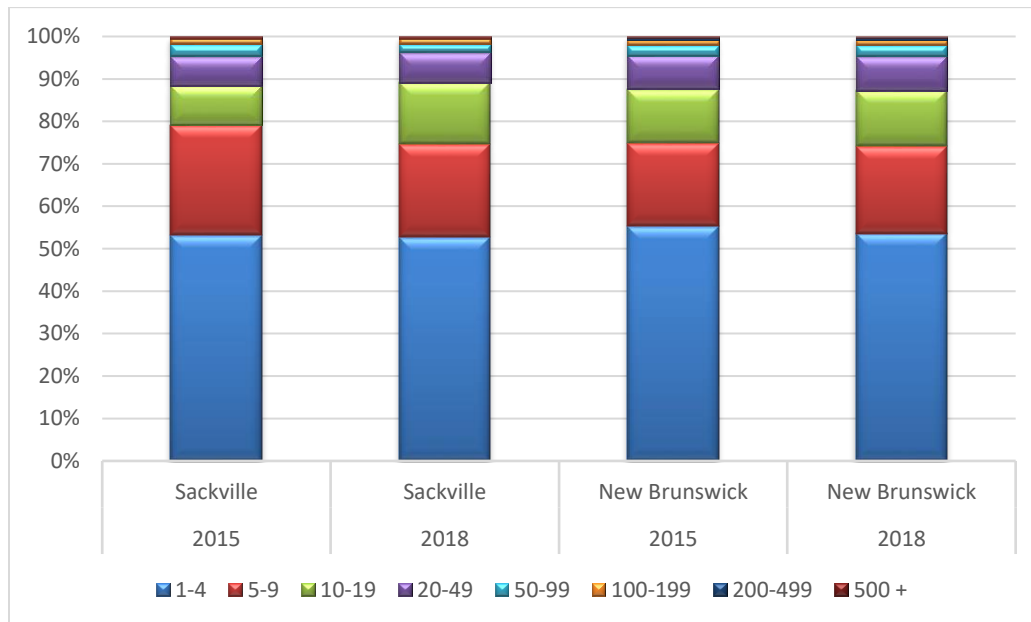
Table 8 Total Establishment Counts 2011 - 2018 (with employees)

	2011	2012	2013	2014	2015	2016	2017	2018
Sackville Area	215	218	232	234	240	226	224	231
Westmorland County	5,062	5,081	5,352	5,398	5,390	5,450	5,519	5,475
New Brunswick	25,500	25,036	25,796	25,494	25,396	25,489	25,577	25,318

Source: Statistics Canada (2012-2018)

Figure 5 presents the number of establishments based on the range of employees employed. Establishments with one to four employees make up the largest number (over 50%) in both the Sackville area and New Brunswick. Most of the remaining businesses fall in the 5 to 49 employee level. However, the Sackville area has a strong representation of businesses (over 20%) in the 10 to 100 employee range.

Figure 7 Total Establishment Counts by Range of Employees 2015, 2018
(Sackville area, with employees)

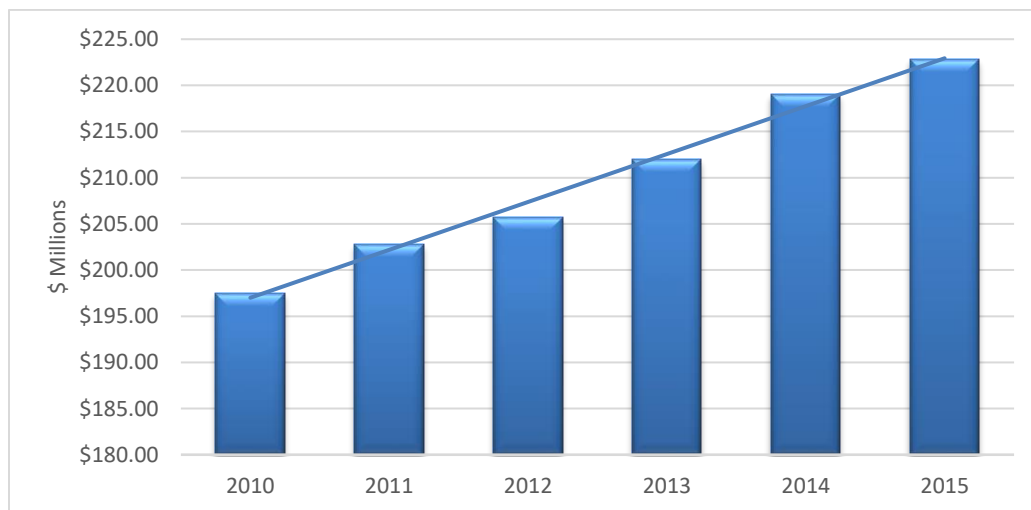


Source: Statistics Canada (2015) (2018)

Personal Income

As seen in Figure 8, total personal income in the Sackville area has increased from \$197.4 million to \$222.8 million or an increase of 12.8 percent, between 2010 and 2015 (the last year of available data). The provincial total personal income has increased by 15.3% during that time.

Figure 8 Total Personal Income for Sackville Area, 2010 to 2015



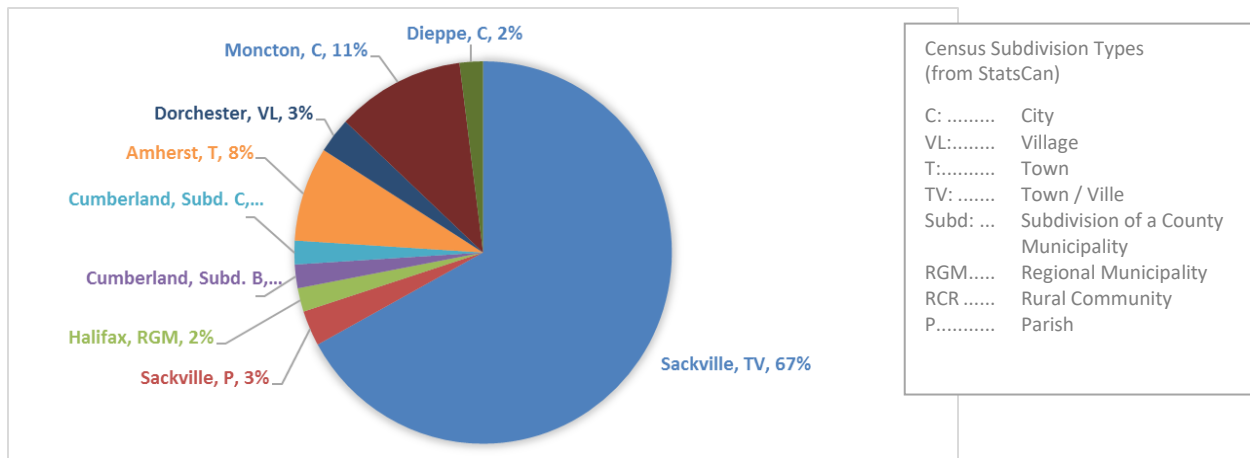
Source: Statistics Canada (2012-2017)

Labour Force Commuting

Figure 9 and Figure 10 illustrates commuting patterns for the workforce that resides in Sackville and for the labour force that travels to work within the Town. Both Figures illustrate that Sackville does well in retaining residents to fill local jobs. This puts the Town in a good position to capture a higher share of money spent by residents. Figure 10 illustrates that the Town has not been as successful in attracting residents from other communities to work in Sackville.

Figure 9 Labour Force: Where do **Sackville Residents** Work (2016)?

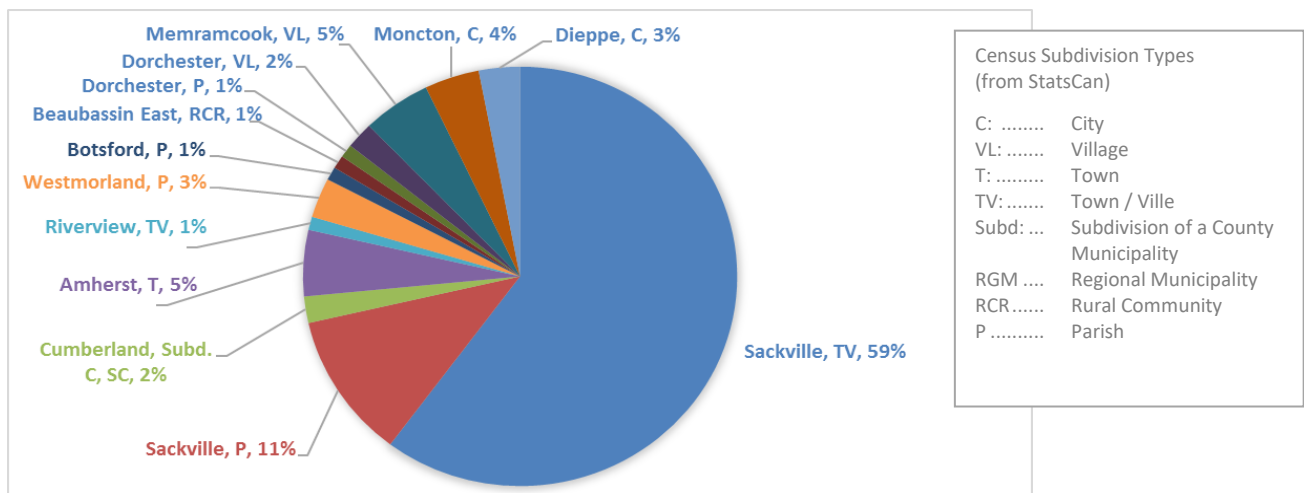
(Usual Place of Work for Town of Sackville Residents, 2016)



Source: Statistics Canada (2017)

Figure 10 Labour Force: Where do **People who Work in Sackville** Live (2016)?

(Locations Workers Commute from to their Usual Place of Work in the Town of Sackville, 2016)



Source: Statistics Canada (2017)

Home Affordability

Table 9 shows lower average sale price to household income ratios for Sackville, when compared to sale price to income ratios for other parts of New Brunswick. In short, Sackville enjoys greater home affordability than other areas of the province, a strength when attracting new people and investment to the community.

Currently there are 56 residential properties listed in Sackville with an average list price of \$169,250 on November 12th, 2018 (The Canadian Real Estate Association).

Table 9 Home Affordability

	Average Sale Price	1 Person Households		2+ Person Households	
		Average Sale Price to Income	Median Income	Average Sale Price to Income	Median Income
Fredericton	\$187,714 (Aug 2018)	5.4	\$34,724	2.3	\$82,024
Northern Region NBREA*	\$131,577 (Aug 2018)	5.4	\$24,288	1.9	\$68,315
Moncton	\$177,214 (Aug 2018)	5.5	\$32,490	2.3	\$78,335
Saint John	\$185,934 (Aug 2018)	5.9	\$31,282	2.3	\$81,243
New Brunswick	\$177,644 (Aug 2018)	6.2	\$28,747	2.4	\$74,207
Sackville**	\$168,433 (2018)	5.1	\$32,896	2.2	\$76,075

* Northern Region of New Brunswick, as defined by NB Real Estate Association.

**Sackville Average Sale Price from a Service NB Property Assessment online analysis whereas other average sale prices from NBREA.

Sources: New Brunswick Real Estate Association (2018) Statistics Canada (2017) Service NB (2018)

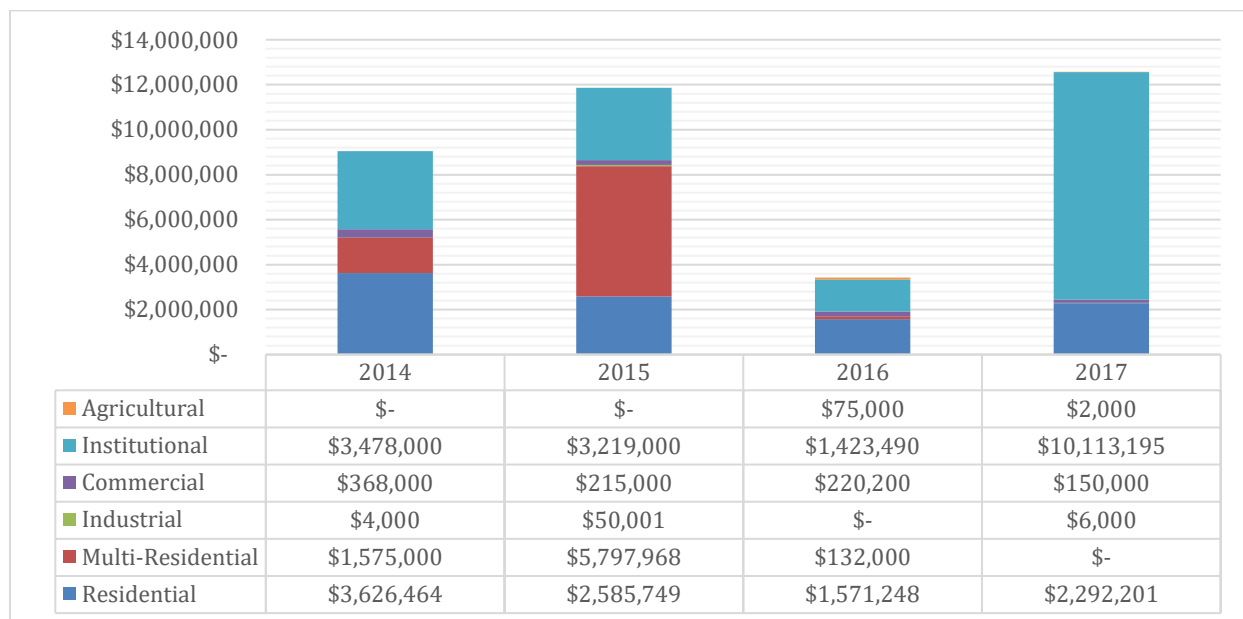


3.1.6 Building Permits

Figure 11 outlines the value of building permits in the Town of Sackville over the four-year period ending in 2017. A peak of 5 new multi-residential developments 2015 is an unusual occurrence (Bickford, 2018, pers. comm.). The unusually high institutional numbers are reflective of the fact that all Mount Allison developments, including residences, is classified as institutional. (Bickford, 2019, pers. comm.). Over the past four-year total building permit value has fluctuated from a high of \$12.6 million in 2017 to a low of \$3.4 million in 2016.

The year to year fluctuation in building permit values is typical of small communities where project developments like subdivision approvals are recorded in batches, and single developments affect statistics more significantly.

Figure 11 Building Permits for Town of Sackville, 2014 to 2017



Source: SRSC (2019)



ECONOMIC BASE ANALYSIS

Labour Force by Industry

Table 10 shows the experienced labour force by industry for the Town of Sackville between 2001 and 2016. During that 15 year period, the Town's experienced labour force expanded modestly by 10%, with most of the growth in the service sectors, notably health care and social assistance. Goods employment increased marginally, although manufacturing declined by 25%.

Table 10 Experienced Labour Force by Industry Sackville, 2001 to 2016

	2001	2016
11 Agriculture; forestry; fishing and hunting	50	95
21 Mining; quarrying; and oil and gas extraction	0	10
22 Utilities	20	10
23 Construction	75	140
31-33 Manufacturing	235	175
41 Wholesale trade	80	45
44-45 Retail trade	300	280
48-49 Transportation and warehousing	100	80
51 Information and cultural industries	45	50
52 Finance and insurance	85	125
53 Real estate and rental and leasing	20	35
54 Professional; scientific and technical services	115	130
55 Management of companies and enterprises	15	10
56 Admin & support; waste manag. & remediation services	70	120
61 Educational services	505	485
62 Health care and social assistance	195	435
71 Arts; entertainment and recreation	70	90
72 Accommodation and food services	280	330
81 Other services (except public administration)	135	130
91 Public administration	265	175
	2,660	2,950

Source: Statistics Canada (2001) (2017)

Location Quotients

Location quotients (LQs) are a tool for comparing a community's labour force distribution with a benchmark area (in this case New Brunswick) to identify relative concentrations of workers. An LQ of 1.0 indicates that the community employs the same proportion of its labour force in that industry as the province does. Conversely, an LQ of less than 1.0 indicates that there are relatively fewer people employed in that industry. A high LQ implies the existence of competitive advantage although the data at this level do not identify what those advantages might be.

Table 11 shows Sackville's employment concentrations to be highest in Management of Companies, Education Services, Arts, Entertainment and Recreation Services, and Accommodation and Food Services. There was little change between 2001 and 2016 in terms of industry positioning, although there were substantive drop-offs in Retail Trade and Public Administration.

Table 11 Location Quotients for Major Industry in Sackville

	2001	2016
11 Agriculture; forestry; fishing and hunting	0.34	0.76
21 Mining; quarrying; and oil and gas extraction	-	0.29
22 Utilities	0.73	0.40
23 Construction	0.44	0.63
31-33 Manufacturing	0.70	0.70
41 Wholesale trade	0.87	0.53
44-45 Retail trade	1.01	0.77
48-49 Transportation and warehousing	0.69	0.58
51 Information and cultural industries	0.86	0.97
52 Finance and insurance	1.07	1.33
53 Real estate and rental and leasing	0.70	1.15
54 Professional; scientific and technical services	1.22	0.97
55 Management of companies and enterprises	11.76	3.69
56 Admin & support; waste manag. & remediation services	0.56	0.80
61 Educational services	2.88	2.37
62 Health care and social assistance	0.66	1.11
71 Arts; entertainment and recreation	1.65	1.70
72 Accommodation and food services	1.59	1.60
81 Other services (except public administration)	0.94	0.95
91 Public administration	1.28	0.70

Source: Statistics Canada (2001) (2017)

Shift-Share Analysis

The labour force data used in Table 10 is modelled differently to illustrate the shifting structure of the economy seen in Table 12. The LQ analysis has already demonstrated that comparative advantages may still exist whether or not an industry is actually growing. Between 2001 and 2016, Sackville gained 290 jobs—the shift-share analysis attempts to shed some light on the causal nature of that increase by breaking down the change in employment into three components:

1. ***Growth or decline arising from provincial employment growth***

If provincial employment is growing then it is reasonable to expect regional and industry growth to be increasing as well. This provincial growth effect is determined by multiplying 2001 base employment by the percentage change in total NB employment between 2001 and 2016.

2. ***Growth or decline arising from the nature of industry***

The industry mix is calculated by multiplying 2001 base employment by the percentage change in overall employment between 2001 and 2016 in NB, for that industry.

3. ***Growth or decline attributable to the specific conditions of Sackville***

This third component is the residual remaining. This local competitive effect is arrived at by multiplying the 2001 base employment by the percentage change in that industry's employment between 2001 and 2016 in Sackville, less the percentage change in the industry for NB as a whole.

The provincial effects are all positive because overall provincial employment increased between 2001 and 2016. The industry effects differ substantially by industry but it can be seen that most of the decline was in goods-producing industries such as manufacturing.

The local competitive effect, the area where Sackville has the greatest ability to influence as a community, is the residual employment. In this component, Sackville generated positive results in primary production (Agriculture, Logging, fishing and Hunting) and Health Services but negative most other industries. What the data suggest is that employment growth in Sackville over the last 15 years can be attributed to overall provincial and industry growth rather than to local factors.

Table 12 Shift-Share Analysis of Major Industry in Sackville, 2001-2016

	Provincial Growth	Industrial Mix	Local Competitive	Total
11 Agriculture; forestry; fishing and hunting	13	-14	46	45
21 Mining; quarrying; and oil and gas extraction	1	5	4	10
22 Utilities	1	-1	-11	-10
23 Construction	19	46	0	65
31-33 Manufacturing	23	-41	-43	-60
41 Wholesale trade	6	-3	-38	-35
44-45 Retail trade	37	69	-127	-20
48-49 Transportation and warehousing	11	-3	-28	-20
51 Information and cultural industries	7	0	-2	5
52 Finance and insurance	17	26	-3	40
53 Real estate and rental and leasing	5	3	7	15
54 Professional; scientific and technical services	17	60	-62	15
55 Management of companies and enterprises	1	12	-18	-5
56 Admin & support; waste management	16	27	7	50
61 Educational services	65	93	-177	-20
62 Health care and social assistance	58	159	23	240
71 Arts; entertainment and recreation	12	25	-17	20
72 Accommodation and food services	44	65	-59	50
81 Other services (except public administration)	17	-3	-19	-5
91 Public administration	23	41	-155	-90
Total	393	568	-671	290

Source: Statistics Canada (2001) (2017)

Employment Change, 2001 to 2016

Detailed industries ranked (three-digit NAICS level) by employment change between 2001 and 2016 are shown for Sackville in Table 13. The detailed industries show considerably more detail as to where employment was won and lost during this period. The top employers are all in services while employment concentration compared to the province is highest in several areas of manufacturing, Performing Arts, Credit Intermediation, Heritage Institutions and Education Services. Gainers and Decliners tended to be in service industries.

Table 13 Employment Change in Detailed Industries, 2001 to 2016

Top 10 Industries (for Sackville Workers)			
By Employment 2016	By % of Total Employment (LQ) Versus NB 2016	By Employment Gains 2001-2016	By Employment Decline 2001-2016
611 Educational services	335 Electrical equipment	624 Social assistance	911 Federal government public administration
722 Food services and drinking places	711 Performing arts, spectator sports and related industries	522 Credit intermediation and related activities	335 Electrical equipment
541 Professional, scientific and technical services	326 Plastics and rubber products manufacturing	561 Administrative and support services	445 Food and beverage stores
621 Ambulatory health care services	522 Credit intermediation and related activities	621 Ambulatory health care services	611 Educational services
561 Administrative and support services	712 Heritage institutions	111 - 112 Farms	333 Machinery manufacturing
622 Hospitals	611 Educational services	238 Specialty trade contractors	334 Computer and electronic product manufacturing
911 Federal government public administration	482 Rail transportation	622 Hospitals	416 Building material and supplies merchant wholesalers
522 Credit intermediation and related activities	325 Chemical manufacturing	623 Nursing and residential care facilities	447 Gasoline stations
624 Social assistance	332 Fabricated metal product manufacturing	441 Motor vehicle and parts dealers	451 Sporting goods, hobby, book and music stores
238 Specialty trade contractors	339 Miscellaneous manufacturing	722 Food services and drinking places	485 Transit and ground passenger transportation

Source: Statistics Canada (2001) (2017)

KEY SECTORS

Manufacturing

Indicators

Total Labour Force	2,950
(31 – 33) Manufacturing Labour Force	175
Largest Manufacturing Category: (332) Fabricated Metal Products	35
Business Locations (2018)	3

Major Employers

Product

Russel Metals	Carbon hot rolled, cold finished and stainless steel, pipe and tubular products, aluminum and other non-ferrous specialty metals
Terra Beata (Future)	Frozen IQF Berries and Berry Products
Karen Phytoplankton / Bluegenics Innovations	Nutritional Supplements, White Label production, lab-grown bio-pharmaceuticals, Phytoplankton Product Development and Formulation
Camtram	Electrical transformer manufacturing, repair, remanufacturing and service.

Strategic Advantages

- Central Maritime Location
- Skilled Labour Force
- Active and Strong Municipal Support and Connections
- Excellent Road Infrastructure
- Local Infrastructure quality

Development Issues

- Land availability and costs
- Trade issues- agreements and tariffs
- Value of Canadian dollar
- Labour Force Availability

Key Trends

- Increasing technology inputs
- Rising productivity (declining employment)
- Global outsourcing
- Skill shortages – trades, marketing, management
- Changing industry dynamics - value chain practices

Terra Beata Farms Sackville IQF Facility – Crescent Street, October 2018



Tourism

Indicators

Total Labour Force	2,950
(72) Accommodation and Food/Beverage Labour Force	330
(721) Accommodation Services	45
(722) Food Services and drink places	285
Accommodation, Food and Beverage Business Locations (2018)	25

Key Regional Attractions, Strengths and Opportunities

- Hopewell Rocks
- Confederation Bridge / PEI
- Arts and Cultural Festivals
- Strong, Modern Branding
- Johnson's Mills Shorebird Interpretation Centre, Moncton
- Fort Beauséjour—Fort Cumberland National Historic Site
- Joggins Fossil Cliffs
- Sackville Waterfowl Park
- Silver Lake
- Local Galleries & Museums
 - Owens Art Gallery
 - Fog Forrest Gallery
 - Campbell Carriage Factory Museum
 - Boulton House Heritage Centre
- Live Entertainment Venues
- Arts and Cultural Events:
 - Sappyfest
 - Fall Fair
 - Winterfest
 - Sackville Early Music Festival
- Sackville Farmer's Market
- Mount Allison University

Development Concerns

- Competition from other Maritime regions
- Awareness in the market place
- Lack of market and export readiness
- Investment in new attractions and experiences

Key Trends

- Changing demographics
- Changing activity trends
- Fluctuating value of Canadian dollar
- Influence of technology
- Sustainability/responsible tourism
- Increasing US visitors
- Growth of emerging markets
- Cost of energy (gas prices)
- US border security issues
- Labour and skills shortages



Retail and Wholesale Trade

Indicators

Total Labour Force	2,950
(41; 44-45) Retail and Wholesale Trade Labour Force	325
(41) Wholesale Trade	45
Largest Wholesale Category – (41) Food, beverage and tobacco merchants	25
(44-45) Retail Services Labour Force	280
Largest Retail Category – (445) Food and Beverage	60
Business Locations (2018)	32

Major Employers

- Jean Coutou
- Foodland
- Downtown Food and Beverage Establishments
- Payzant's Home Hardware
- Sackville Independent

Strategic Advantages

- Core Retail Trade Area
- Downtown Business District Zone
- Central Maritime Location
- Large Student Population
- Strong Arts and Cultural Events
- Good percentage (19%) of population in the Target Retail Age Group (25-44)
- University Employee and Student and Population
- New Local Road and Infrastructure Investments
- Beautification Initiatives

Development Issues

- Few greenfield properties
- Lack of an office cluster
- Downtown revitalization
- Spending leakage
- Strong clusters in neighbouring communities
- Competition from other shopping districts

Key Trends

- Demographic trends
- Consumer trends
- Changing retail cycle
- Expansion of foreign retailers
- E-commerce and e-retailing
- Continued growth of home-based business
- Repurposing of downtown buildings
- Integration of residential and entertainment facilities downtown
- Mixed use developments

Downtown Sackville



Education

Indicators

Total Labour Force	2,950
(61) Education Labour Force	485
(6111) Elementary and Secondary Schools Labour Force	115
(6113) University Labour Force	330
2015 Anglophone East School District / Sackville School Enrollment ⁴ (Department of Education and Early Childhood Development, 2016, p. 53)	15,477 / 1,027
2016 Anglophone East School District / Sackville School Enrollment ¹ (Department of Education and Early Childhood Development, 2017, p. 53)	15,624 / 1,033
2017 Anglophone East School District / Sackville School Enrollment ¹ (Department of Education and Early Childhood Development, 2018, p. 51)	15,661 / 1,065
Mount Allison University enrollment full-time 2008 / 2013 / 2018 (Association of Atlantic Universities, 2008,2013,2018)	2,187 / 2,426 / 2,096
Mount Allison University Total Teaching Staff (2017) (Statistics Canada, 2017)	138

Key Institutions and Organizations

- Mount Allison University
- Springboard Atlantic
- District Education Council (DEC) of the Anglophone East School District
- Tantramar Senior's College
- Sackville Schools 2020
- Marshview Middle School
- Salem Elementary School
- Tantramar Regional High School

Key Trends

Higher Education

- MTA Declining Enrollment 2013-present
- MTA #1 undergraduate university in Canada by Maclean's magazine for 19 of the past 27 years
- MTA Steady International Student Population ~10% since 2009
- Evolution of higher education as a competitiveness attribute among advanced economies.
- Rising average age of students.
- Emergence of heterogeneous student bodies due to increase enrolment by women, ethnic groups and students from different socio-economic backgrounds.

Strong Alumni

- Springboard Atlantic Membership
- SHAD Partnership

K-12

- Steady enrolments
- Aging infrastructure (Earnst and Young (EY), 2017)
- Sackville Schools 2020 Vision
- Growth and impact of open, distance and virtual learning options.
- Increasing focus on accountability, quality and performance.
- Increasing access to communication technology.

¹ Marshview Middle School, Salem Elementary School, and Tantramar Regional High School

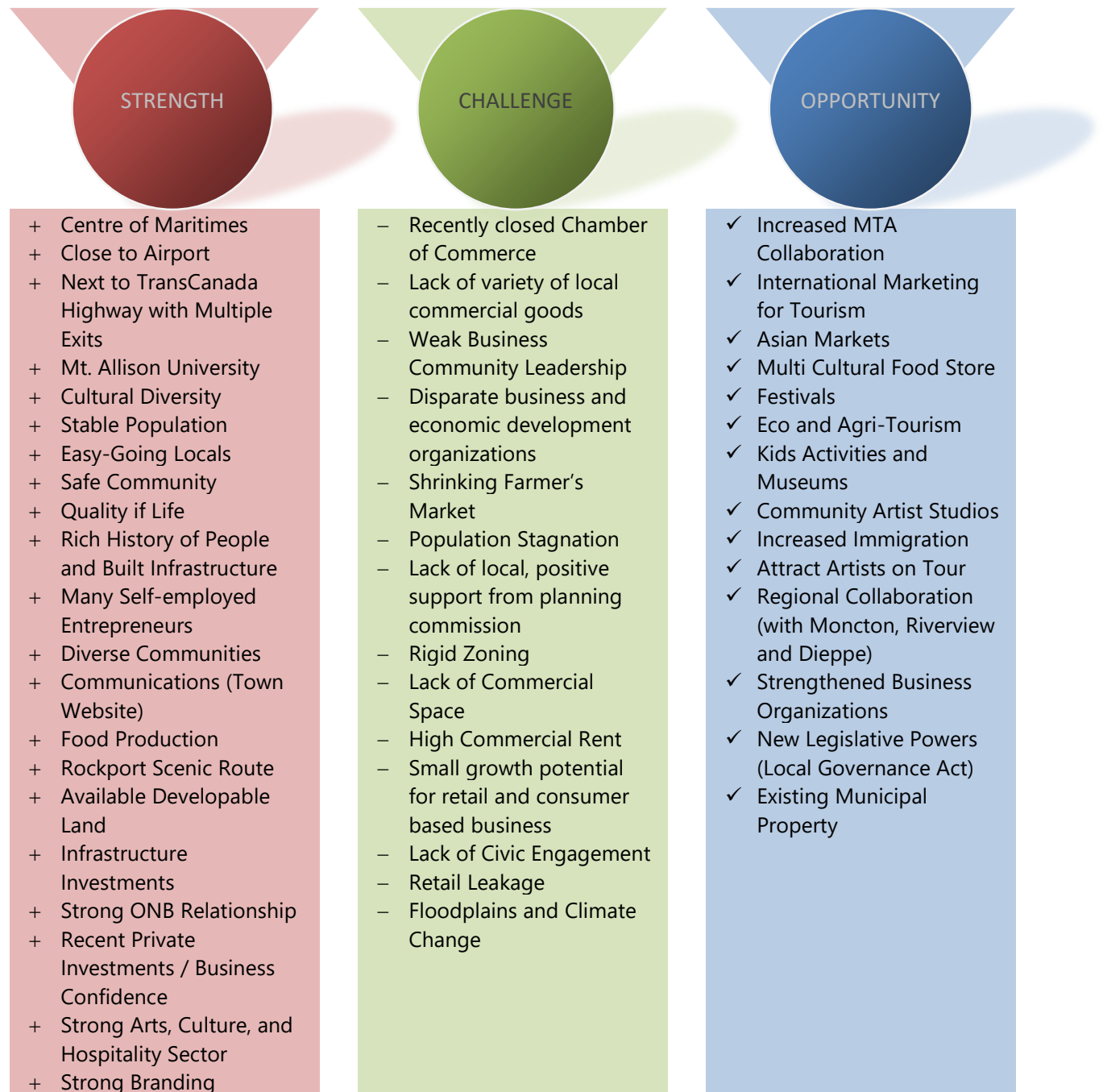
Alumni Field

A true testament to Mount Allison University's alumni, friends,
Alumni Field was officially opened to the public
November 26, 2015.



STRENGTHS, CHALLENGES AND OPPORTUNITIES

Select items from interviews, public engagement, and research to date.



APPENDIX B - SMART PRACTICES

Business Retention and Expansion (BRE)

Business Retention and Expansion or BRE is an economic development strategy that seeks to strengthen and empower existing businesses in a community. Successful BRE programs seek to increase the resilience of local businesses, increase their likelihood of growth and expansion, reduce the possibility of their relocation to another community, and harness their networks to amplify marketing efforts and increase the attractiveness of the community to other companies in their supply chain or sphere of influence.

Many BRE programs include the delivery of a data survey or diagnostic tool, a “BRE Action Team” consisting of local volunteers and business organization representatives to help lead and champion the program, a data collection repository, a process for the identification and resolution of business opportunities and challenges, and a reporting system and/or process.

In Atlantic Canada, best practices in BRE can be shown in two distinct models, the “Pulse Model” which marshals a larger amount of resources for a concentrated engagement program once annually or biennially, or the “Continuous Model” which requires a smaller number of resources with actions happening continuously throughout the year. Both models have the benefit of identifying, in a systematic manner, local business issues, business climate indicators, emerging threats and opportunities to support growth. Both models also require collaboration between the lead agency and/or person and other local or regional business support agencies.

Bridgewater, Nova Scotia (population approximately 8,500) has been a leader in this model. Bridgewater conducted a “BRE Pulse” every two years and found it to be effective for their community as it fit their volunteer capacity (larger number of volunteers for a shorter period of time) and their workplans as staff.

Vernon BC (population approximately 40,000) is also a leader in this program. They utilize 25 volunteers annually from their Chamber, BIA, Community Futures (the western version of CBDC), municipal staff, and local professionals and have conducted 713 walks over the last 5 years. This year, they will launch a “Virtual Business Walk” utilizing their web-based CRM (Customer Relationship Management) program.

The “Continuous Model” is utilized in Halifax and in many of the “Regional Enterprise Networks” in Nova Scotia. Although very similar, the continuous model achieves a similar annual number of conversations but spreads the work over the course of a full year and is the responsibility of dedicated employees.

BRE FOLLOW-ON PROGRAMS

BRE activities often identify needs in a business community that can then lead to new collaborative programs to fill those needs. One example is a connector program, which aim to open up the “hidden job market to local talent, which is becoming more popular in New Brunswick. ONB Connects is part of the National Connector Program which is based (and founded) in Halifax. A connector program is suitable for many communities as it engages business community volunteers (connectors) in a meaningful capacity while requiring a simple and bounded commitment – to have a cup of coffee and a chat, and then offering three names from their network that the connectee (a student or newcomer) can get in touch with. (Halifax Partnership, 2018).

BRE COLLABORATION

Collaboration and leadership from businesspeople and business organizations such as Chambers of Commerce or Business Improvement Associations is critical to all BRE programs. Strong partners are essential to ensure issues outside of municipal influence or control can be referred to other partners and that the program remains nimble, relevant, and responsive to business needs.

Investment Attraction

Investment attraction or “IA” programs in smaller communities vary in scope and style throughout North America. Activities can include but are not limited to marketing initiatives such as “come home” campaigns, real estate development facilitated by municipal investment, investment attraction tours, tax incentives, direct grants or innovative zoning.

The hallmark of high-performance investment attraction is collaboration. Small communities in particular have limited means to launch effective marketing campaigns, and limited resources to capitalize on opportunities should those campaigns prove successful. Following are examples of collaborations in more rural Canadian communities.

ANTIGONISH, NOVA SCOTIA

Eastern Strait Regional Enterprise Network Membership

The Town of Antigonish participates in the Eastern Strait Regional Enterprise Network (ESREN) along with 5 other Municipal units in the area – the towns of Port Hawkesbury and Mulgrave, and the Municipalities of Antigonish, Guysborough, and St. Mary’s. The ESREN coordinates both BRE and IA activities in the region, resulting in more sophisticated efforts than the individual communities may have developed independently. The Development Database,

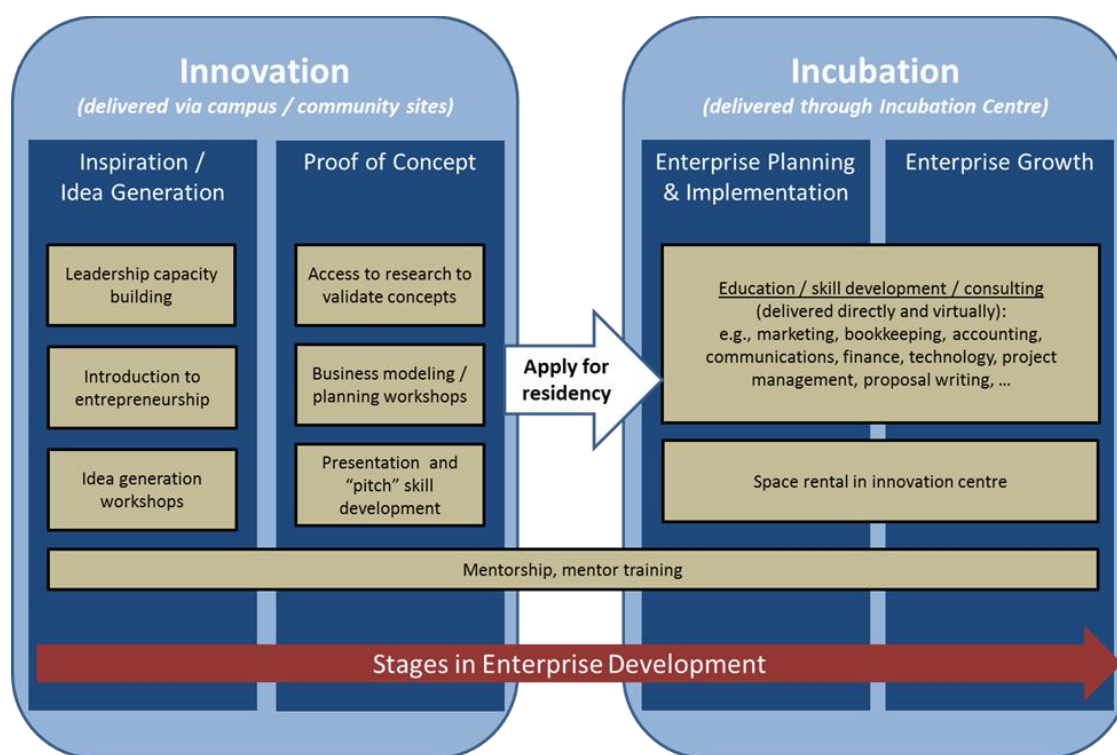
showing assets, zoning, and other information useful for investors, is an example of a regional service that is much more useful for investment attraction for potential new businesses or entrepreneurs. The ESREN's "one-stop-shop" function is also a regional benefit, allowing businesses to access the information and intelligence they need more easily and with confidence that the person answering the phone or email can answer the question or provide the service immediately, respond quickly with the resource, information, or local intelligence needed, or refer the inquiry on to another trusted source.

As St. Francis Xavier University and the Port Hawkesbury campus of the Nova Scotia Community College are both within the area supported by the ESREN, Post-Secondary Engagement is one of the 7 focus areas in the ESREN's 3 year Economic Development Strategy (John Beaton, 2016). The ESREN's primary activity in this engagement is that of a connector between the academic institutions and businesses, as well as assisting in the application of grant funds.

St. Francis Xavier University Extension Department: Innovation and Enterprise Centre

The StFX Extension Innovation and Enterprise Centre is an important partner in Economic Development for Eastern Strait region of Nova Scotia. It works to build off of existing community assets, university research capacity and market demand to develop new business opportunities as shown in their four phased service delivery model.

Figure 12 StFX Four Phased Approach to Innovative Enterprise Development



(St. Francis Xavier University Extension Department: Innovation and Enterprise Centre, 2018)

*Community Economic Development Initiative CEDI:
Paqtnkek Mi'kmaw Nation, County of Antigonish, and ESREN*

This CEDI partnership, developing concurrently with the Paqtnkek Highway Interchange Project, focusses on business readiness in partnership with ESREN, exploring shared services and land-use planning, and potential collaboration on renewable energy development (Federation of Canadian Municipalities, 2018)

A friendship accord laid the basis of the CEDI initiative through the Federation of Canadian Municipalities, and serves as a model for other similar efforts throughout Atlantic Canada and across the country.

WOLFVILLE, NOVA SCOTIA

Wolfville, like Sackville, is home to a prestigious university immediately adjacent to its downtown – Acadia University. Recently, Wolfville, Acadia, and the Students' Union entered into a Partnership Agreement to lay “the foundation on how [they] will mobilize to ensure that we can best meet the needs of our community and respective institutions” (Town of Wolfville, Acadia University, and Acadia Students' Union, 2018).

Wolfville's approach to economic development is anchored around their Manager of Economic Development and includes collaboration with many complementary organizations including the Wolfville Business Development Corporation, the Annapolis Valley Chamber, Kings County, and the Valley Regional Enterprise Network which has a similar mandate as the ESREN that serves Antigonish.

MIRAMICHI, NEW BRUNSWICK

Miramichi maintains an in-house economic development function similar to Wolfville, only slightly larger with a 3-person Economic Development and Tourism department dedicated to Economic Development.

Miramichi was the first New Brunswick community to take advantage of the new powers granted under section 104 of the Local Governance Act (Government of New Brunswick, 2017) which came into effect January 1st, 2018. Its new program, initiated in 2018, involved the creation of a small pool of capital to contribute a total of 5% of a private company's capital costs or property improvements (based on building permit numbers supplied to the regional planning commission). The program is sector specific and reimbursements are both spread over 5 years (in 1% increments) and contingent on development milestones being achieved.

Miramichi also actively markets property at less than fair market value and works to achieve economic development objectives by way of buy-back agreements and development obligations that allow the City to repossess lands that haven't been developed as agreed.

ACCESS PROSPERITY, CENTRAL ALBERTA

Similar to the REN model that the Town of Antigonish participates in, AccessProsperity is a collaboration of over 40 municipalities in central Alberta. Individually, most of the communities would be unable to engage in multi-lingual international marketing activities but together the region ensures that perspective investors are targeted and provided with the data, information and quality service they need. AccessProsperity then connects investors to the right local decision makers in the best suited community who have the on-the-ground connections and information and assistance, as well as the provincial departments and services as needed.

Individual communities are then able to focus on identifying opportunities and working to make them investment ready, as well as focusing on quality of life investments to improve their community's value proposition.

LOWER COLUMBIA INITIATIVES CORPORATION (LCIC), SOUTHERN BC

The LCIC is a partnership between Columbia Basin Trust (a community development funding agency initially set up by the Province of BC) and 5 municipalities; City of Rossland (pop. 3,729), City of Trail (pop. 7,709), Village of Warfield (pop. 1,680), Village of Montrose (pop. 996), Village of Fruitvale (pop. 1,920) and electoral areas A & B of the Regional District of Kootenay Boundary (pop. 3,333).

The organization provides a "cohesive, comprehensive, region-wide approach to the challenges and opportunities of economic development in the Lower Columbia Region" (Lower Columbia Initiatives Corporation, 2018) and enables the region to conduct business attraction and retention functions as a group in ways they couldn't as individual communities.

Selkirk College, located next to Castlegar, BC is outside of the area served by LCIC, yet remains a major employer for the region with 450 employees (Lower Columbia Initiatives Corporation, 2018). The College is featured prominently in the 2017 Regional Profile as an integral part of the region's value proposition especially in applied research and innovation while some of its key strengths, such as geospatial technology, complement the environmental and socio-economic values of the communities of the Lower Columbia region.

Performance Measurement

Performance Measurement is an important best practice in the successful delivery of any economic development programme or initiative. Although common measures such as labour force from the census are easily available from trusted sources however, in smaller communities in particular, such measures are not adequately connected to actions of local communities as they work to improve their economies. It is important to ask the question, “What are we trying to achieve”, and then develop metrics that support performance and highlight successes, rather than simply measure for measurement’s sake.

A good example of measuring what matters is to break business development work into four main categories: Inputs, Actions, Outputs, and Outcomes.

Figure 13 Performance Measurement Logic Model



Money	Tourism Promotion	Inquiries	Job Growth
Staff/ volunteers	Business Recruitment	Project Files Opened	Capital Investment
Facilities	Retention & Expansion	Corporate Calls	Assessment
Equipment/ supplies	Small Business Services	Clients Served	Business Start-ups

Source: Murray (2017)

APPENDIX C - BUSINESS SURVEY RESULTS

Q1 - Over the next year, I feel the Sackville economy will grow.

A full 45.0% strongly agree or agree with this statement while only 15.0% disagreed and the remaining 40.0% of the 40 respondents neither agreed or disagreed.

Q2 - Looking forward five years to 2023, what is your view of the population level for the Sackville Area?

A full 55.0% of the 40 respondents felt that population would be similar in 2023 as in 2018. Only 10.0% felt would be less than 2018, while 32.5% felt would be slightly larger.

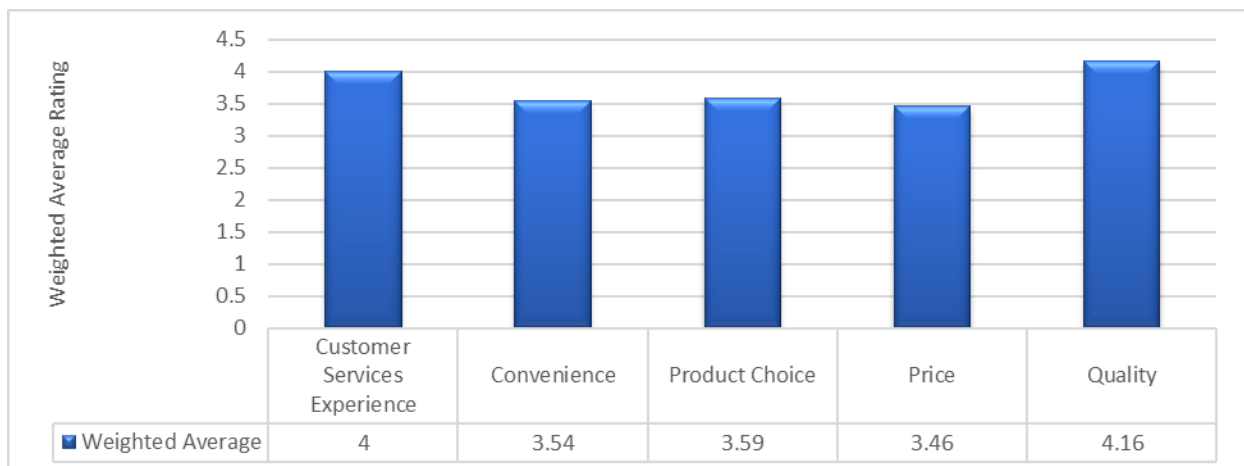
Q3 - How satisfied are you with Sackville as a place to live?

Only 2.5% of respondents were not satisfied with Sackville as a place to live while 52.5% were very satisfied or extremely satisfied Sackville as a place to live.

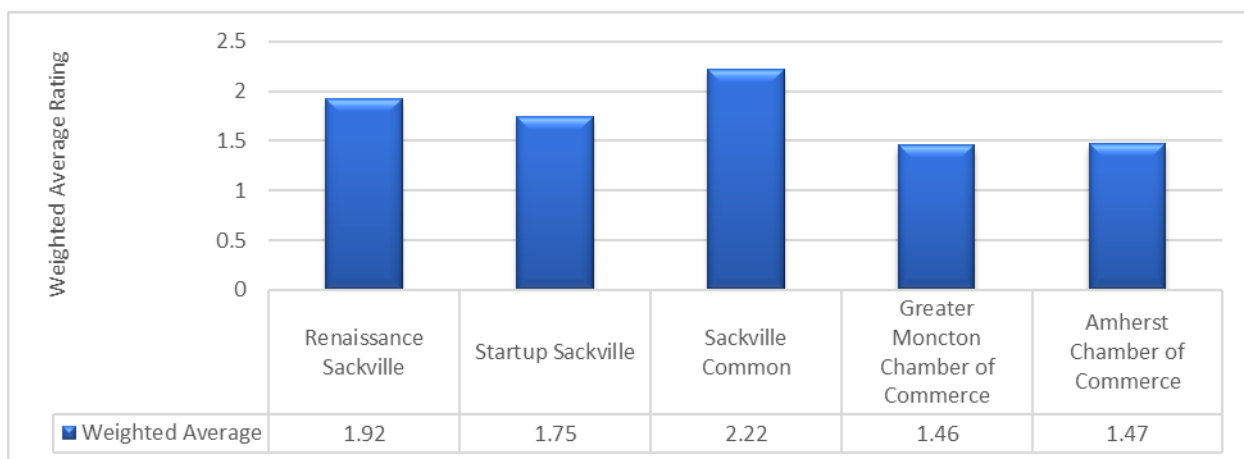
Q4 - How satisfied are you with Sackville as a place to do business?

Only 12.5% of respondents were very satisfied or extremely with Sackville as a place to do business. This is the same as those that were not at all satisfied. A full 75.0% of the 40 respondents indicated that they were somewhat satisfied or satisfied with Sackville as a place to do business.

Q5 - Please rank the following business services in Sackville that are important to your business activities.



Q6 - How effective and relevant are the following business organizations positioned to serve and represent the business community in Sackville now and in the future?



Q7 - What portion of your sales are made to customers from within the Town of Sackville?

Only 15.4% of respondents make between 81 and 100% of their sales to customers from the Town of Sackville. A further 28.2% make between 61 and 80% of their sales to customers from the Town. Conversely, 35.9% make 0 to 20% of their sales to customers from the town of Sackville.

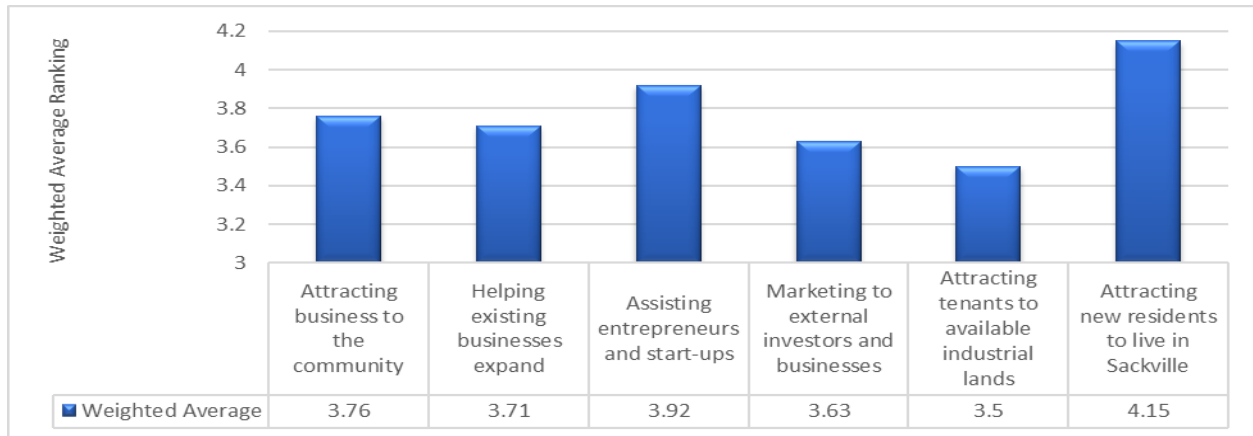
Q8 - Where are your customers/clients primarily located?

Answer Choices	Responses	
Amherst, NS	13.79%	4
Greater Moncton (Moncton, Riverview, Dieppe and Region)	24.14%	7
Fredericton	3.45%	1
Saint John	0.00%	0
Elsewhere New Brunswick (outside of Moncton, Fredericton, and Saint John)	27.59%	8
Elsewhere in Atlantic Canada (outside of NB, but inside Nova Scotia, PEI and or Newfoundland Labrador)	20.69%	6
Elsewhere in Canada (outside Atlantic Canada)	6.90%	2
Outside Canada	3.45%	1
Answered		29
Skipped		11

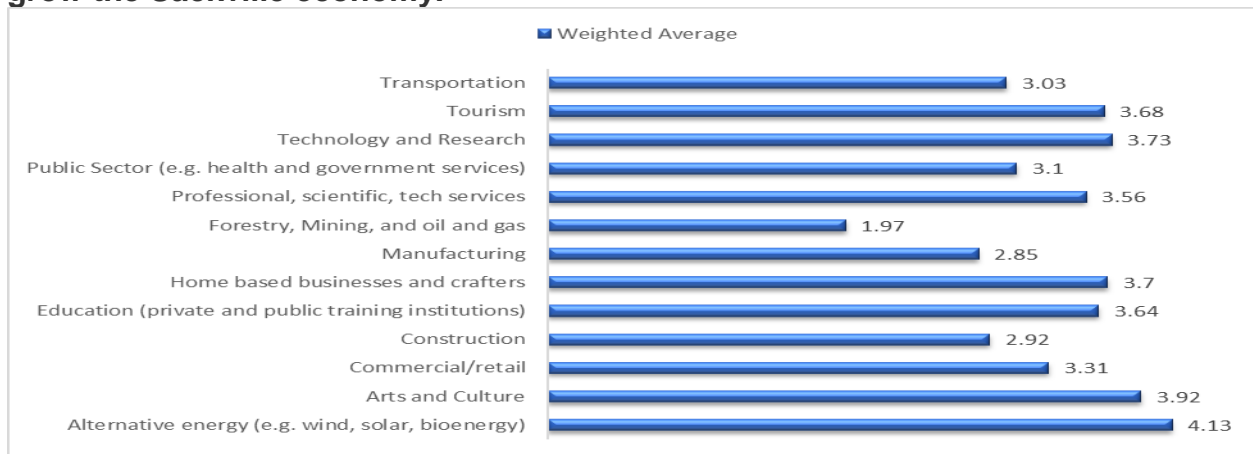
Q9 - Which statement best describes your view regarding future commercial growth in Town of Sackville?

A full 67.5% of respondents identified they support significantly more commercial growth while the remaining 32.5% supported slightly greater commercial growth. No one responded that they wanted less commercial growth or no commercial growth.

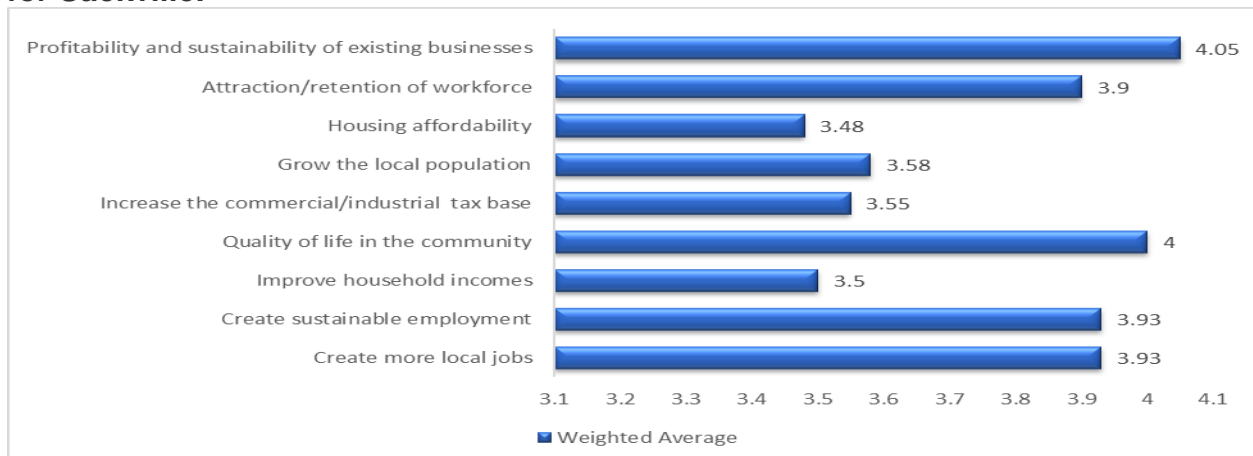
Q10 - Which business development priorities do you feel are important for Sackville?



Q11 - Please rank the following sectors based on your view of their potential to grow the Sackville economy.



Q12 - Please rank the importance of the following economic development goals for Sackville.



Q13 - What best describes the sector that your business operates in?

The respondents came from several sectors including: 21.1% from retail/wholesale trade; 15.8% from private/business services; 13.2% from public services; 7.9% from manufacturing; with the remainder identifying other, construction and primary sectors.

Q14 - What factors influence your decision to keep your business in Sackville?

Highest importance	Second most important	Third most important
Existing client base	Live in Sackville	
quality of life	transport links	small town environment with large town assets
Combination of people (creators, innovators, thinkers, doers)	Mount A	Location
Quality of life	Ability to earn income	Opportunities for family
Education	Housing	arts and recreation
close knit community/ family	ability to provide services quickly as everything is in a smaller area.	
Quality of life here	Proximity to family	Geographic center of the Maritimes
Educated population	Strong Arts & Culture	Quality of life
meeting local needs and interests	accessibility to connect with other businesses locally	mutual relationships among businesses
Thriving arts and culture community	The town's geographic location	Good quality of life
Quality of life in Sackville	People of Sackville	The franchise I own is located in Sackville
That I'm already here	Supportive landlord	
Continued profitability	Workforce availability	Overall business climate
Family life for staff	Location (central to Atlantic Canada)	Low cost of living for staff
Location	Unique town	Mount A
Low competition in business sector	Proximity to highway (i.e. convenient for tourism, huge potential)	Population base (including MTA students)
Price	Availability of items	Quality of goods
Unique location - museums	Other organizations very willing to partner with us	Municipal support
Stay in my hometown	Not having to drive to far to work	
family roots	central location	friendly community
Housing development	University presence	Growing population
Where I live	Employee local people	Central location
central location in the Maritimes	high investment in infrastructure	history of institution
High Availability of Resources	Population likes environmental sustainability	Makes economic sense
Business	Appropriate office space	ability to attract good assistants
low cost of living	easy accessibility	
Focus of work is in this region	History of the organization	Project partners are here
This is where I choose to live.	n/a	n/a
Quality of Employees	Will Good Employees Commute	How often do I have to go to Moncton to get something done?

Q15 - What factors most concern you about doing business in Sackville?

Greatest concern	Second greatest concern	Third greatest concern
More people need to support local. Council's direct control over industrial land, should be a committee of local stakeholders and council members	Taxes have to be kept in line Trend towards stalling of development. Lafford building's massive delay and nixing of Gordon Beal's senior development due to cultural reasons are primary concerns	Mount Allison's lack of engagement with the local business community
need to strengthen cross business linkages		
lack of consideration of climate change	lack of consideration of climate change	lack of consideration of climate change
Commercial Property Tax	Commercial Property Tax	Commercial Property Tax
loss of population	poor relations between town and university	a lack of vision and innovation
population is decreasing, meaning less work	materials going up in price, which in return means we need to charge more for the work we do.	
Retail leakage to Moncton	Lack of other retailers	Weak marketing
lack of other local businesses valuing mutuality within the sector	lack of commitment of citizens toward buying locally	town gown divide
Lack of concern for failing buildings and poor commercial tenancy protections.	Many people in the town do not want to do business with independent businesses	Lack of growth opportunities due to small population
Lack of population growth	Lack of business growth, both industry and retail	
Local economic development funding	Poor enforcement of building codes on behalf of tenants	Lots of insular groups. Nobody has set up a focus group to track ways to work together
Institutional base / government funding risk	Workforce availability	
Low amount of business support ecosystem	Low number of relevant mentors	Low commercialization work at MTA
Lack of infrastructure/frameworks that support business. No Chamber of Commerce or BDA (or poorly run BDA currently), the town does not hold landlords accountable. Over priced	Unwillingness of town to take responsibility in supporting growth.	Declining population of young people (25-40).
	Have to go elsewhere to find decent clothing/shoes	No diversity
Limited visitor base - need to grow tourism	Aging population	Need to recruit more volunteers
business sector continues to shrink	business is moving off the radar	taxes
Lack of cooperation from the town management	NO Economic Development Officer	
lack of business diversity	lack of adequate customer base	lack of local supplies
Interference by town council	Restrictive by laws for business	Lack of business development
increasing number of apartment builds for students	employment opportunities for work for spouses of our employees	tourism assets to occupy summer conference guests
Very few innovative business leaders	Renaissance Sackville is ineffective. Don't get rid of it; reform it.	No Chamber of Commerce
The lack of a robust economy		
declining population	declining student enrollment	
Need much better promotion/advertising of existing businesses and tourism opportunities	Need to improve the shop local mentality	Proximity to Moncton and Amherst and online shopping
commercial taxes	False expectations of business	
Lack of quality employees	Lack of Hustle	Mediocrity is accepted

Q16 - How many employees do you employ full-time?

Three (8.3%) of 36 respondents employed 100 or more full-time employees; twenty (55.6%) employed 0 to 3; and 5 (13.9%) employed 4 to 6 full-time employees. The remaining 23.2% employed between 7 and 40 full-time employees.

Q17 - How many employees do you employ part-time?

Three (8.3%) of 36 respondents to this question employed 100 or more part-time employees. Twenty-eight (77.8%) employed 0 to 3 part-time employees while 3 (8.3%) employed 4 to 6 part-time employees. The remaining 5.6% employed between 7 and 40 part-time employees.

Q18 - Was the primary reason you located your business in Sackville because you wanted to live in the community?

A total of 65.7% replied yes to this question while 17.1% no and a further 17.1% not applicable (meaning they did not live in Sackville).

Q19 - Please describe the key reasons for locating your business in Sackville

- Live in Sackville
- Known client base

The community, its people, Mount A; this creates a great combination of possibilities, creativity, innovation. Size of community, affordability of housing, opportunities for getting engaged in different activities.

opportunity arose when another company left and offered their customers

Lived here when started business

My husband worked at Mount Allison University.

Opportunity to provide new services to meet local needs.

Buying an interesting business that was for sale.

The franchise already existed in Sackville

- University perks; library, fitness center, art gallery, interesting people
- Supportive landlords
- Convenient location

Filling a void in our particular services

Quality of life for employees

Walkability of town and services

- A community I like living in (laid back, friendly, sense of community, access to everyday needs (insurance, food/drink, bank, etc.)
- A community/population large enough to support the business.
- Proximity to highway provides easy access to hundreds of thousands of tourists.
- Central for distribution to PEI, Moncton, Amherst, basically anywhere.
- No competition in Sackville for my sector.

My business is tied to the museums we operate and the heritage of the Tantramar region. Cannot be done anywhere else.

Company was founded in the area over fifty years ago

Hometown

family history ... it's 'home'

University, broad personal knowledge of community (native), prefer small town lifestyle and convenience

Answered in #14

I am from the area and wanted to live in the "greater Sackville" area. My connection to this place is why we opened an office here.

The low cost of living and ability to work from home

It was started by a group of local residents and has a focus on the local Tantramar region so it makes sense to locate the business here.

Family has lived here for 125 years

Already lived here and kids are going to school.

Existing skilled labour.

Q 20 - How many years has your business been in the Sackville?

A full 41.6% of respondents have lived in Sackville for 21 years or more while 24.9% have lived in the community between 6 and 20 years and the remainder have resided in Sackville less than five years.

Q21 - How many years has your business been at the same location?

A full 32.4% of respondents have had their business at the same location for 21 years or longer. This is similar to the 35.1% who have had their business in the same location for five years or less. A further 24.3% have been in the same location for between 6 and 10 years.

Q22 - Please provide any further comments you may have, including strengths, weaknesses, or opportunities for the community that you feel are important.

Sackville is a great community. Although I would love to see more industry come to Sackville this will not be easy as most of this will fall with the Province. We need to play up on the fact that we are a bedroom community of Moncton and Amherst and try to have more residential activity take place as it's a great place to raise a family. Also, I feel there is a great potential for assisted living and senior housing growth.

Many of my answers are a view as a citizen not representative of a business.

Any business development strategy HAS to have a solid component addressing climate change, both from a mitigation as well as an adaptation point of view. Sackville is at risk from flooding, the dikes are part of that risk. Sackville has a strong interest in energy efficiency and renewable energy. Both aspects need to form the basis for any business development strategy in our changing climate. We are not a "normal" small town where a cookie cutter model of business development will work. This survey in fact has not accounted for our uniqueness, neither on the climate side, nor on the creative, innovation side. I think there needs to be a strong consideration of "risk factors" incorporated and explored in the strategy. Sackville's strength is its creative people, Mount A, and the innovative folks that want to try out new things.

Goals for economic development should focus on bringing in new businesses to set up here or to foster startups by people already here. Everything else (population, incomes, etc...) will rise up with the increase in the business base here.

We need a dedicated economic development person working to attract business, and we need to start implementing the many studies we've already done. Stop surveying- start doing!

The town needs to promote local business more. Many Sackville residents do not shop, eat, or socialize downtown.

I feel there's a lot of missed opportunities to create manufacturing relevant to people in Sackville

I do not own a business my wife does.

I participated in the session at town hall because of my interest in ensuring Sackville grows and offers jobs for all sectors not just arts, culture, academia.

Several of these question are leading in the answer choices provided and a survey on survey monkey is not a means to get to the bottom of what business people need.

You need to be interviewing individually business owners, CEO's of companies like Compact Appliances, AIL, Moneris, Cam-tram. Retail need to be treated differently as their needs are different for business needs.

Please, please stop using leading surveys to garner the thoughts of the community actually get out and talk to people.

We need to do a better job of creating foot traffic in town. An incredible number of tourists travel past Sackville, and they could easily be stopping in town to buy food/drink/merchandise. Simple signage and promotion of what businesses are in town would do wonders.

We could be creating more jobs around tourism. The town needs to invest in its natural attractions, rather than focus entirely on the arts/museums (again, we have plenty of those already). If we are going to focus on the arts, the town should do something to help create a central hub for all of the theater groups so they can put on shows year-round. There should be a buzz in the surrounding communities that Sackville is the place to go to see top quality shows on a regular basis.

Creating policies and frameworks to encourage more small businesses to establish themselves here will help current businesses (a rising tide lifts all boats). The notion that for Sackville to improve its economy we need to bring back hundreds of manufacturing jobs in the industrial park is incredibly outdated. There are no doubts that that would help, jobs are jobs. However, maybe we should shift the focus to mid-level technology-based businesses or growing small business who need to relocate for expansion purposes.

As long as the owner and key staff do not retire, the company will stay in Sackville. Otherwise the business case is not overly strong. Less than 4% of the company's sales are from New Brunswick.

Need a stronger support from the town management for local economic development. Need an effective Manager which is not the case now.

Strong association with University, build on lifestyle benefits that will attract new residents, keep up the very good work from Town administration ... it creates positive citizen support, community growth, economic sustainability, confident leadership presence at Provincial table. Sackville would be a Maritime jewel with 8-9000 residents, go for it!

I work at Mount Allison in the business operations area. Some of the questions don't apply to us. Sackville is a wonderful small town and this is the feature that attracts people to live here if they have a job or self-employed income. The big issue is finding employment for those who would like to move here.

Glad to see the Town is taking the initiative to support business. Just be strategic rather than desperate.

Strengths - great people, innovative, creative and environmentally minded. Great potential to have a local solar or wind farm and make our own power.

Weaknesses - lack of effective advertising and promotion of local businesses, tourism, etc.

Opportunities - Could partner with rest of region to focus on tourism packages. Support entrepreneurs and startups. Opportunity to create local CEDCs.

Threats - Sea level rise, climate change, storms, flooding. The industrial park is low lying and at risk of flooding as are other parts of town. A business plan should also consider long-term changes and link to the town's climate change adaptation plan, emissions reduction plan and sustainability plan. New business investments should not be made in known flood risk areas.

Very hard to understand the relevance of most of these questions

Big weakness is mediocrity. No one wants to take things to the next level and when someone tries to do it, the collective push it down. All ideas have to be financed by grants, then nothing gets done. The bar is really low in Sackville.

Strength is it's a really nice community. We could attract a lot of people from Toronto but we need to up our game with some nicer buildings and better workmanship. Opportunities are in web-based businesses and recruiting people from Toronto who pay huge for their house and commute for hours. We could fill this place up with another 1000 people but Sackville does not have the talent to see the big picture and if someone had the talent, they'd get eaten alive by the small thinkers, office zombies, and grant writers. it would slowly just big one big compromise. Now we pay \$50K plus for a survey and consulting that will go nowhere because no one has the talent to execute it. Hate to be a downer, but we need to go big or let's just save the money and stay in neutral.

I work in the Public Sector (based in Moncton), so many of these questions did not apply to me.
