



# **CITY OF MIRAMICHI ECONOMIC DEVELOPMENT & TOURISM STRATEGY**

## **Background Discussion Paper**



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## Contents

<b>1</b>	<b>Introduction.....</b>	<b>6</b>
<b>2</b>	<b>Literature Review.....</b>	<b>8</b>
<b>3</b>	<b>Economic and Demographic Analysis.....</b>	<b>10</b>
3.1	Introduction .....	10
3.2	Setting the context .....	10
3.3	Considerations: Covid-19 impacts .....	11
3.4	Miramichi as the urban hub for a wider region .....	13
3.5	Population trends.....	15
3.6	Income trends.....	23
3.7	Labour market trends.....	32
3.8	Housing trends.....	41
3.9	Household spending activity .....	46
3.10	Business Count Analysis.....	51
3.11	Tourism Sector Overview.....	58
<b>4</b>	<b>Industry Trends and Outlook .....</b>	<b>63</b>
4.1	Key Findings.....	66
4.1.1	Priority focus areas .....	68
<b>5</b>	<b>Appendix .....</b>	<b>70</b>
5.1	Definitions.....	70
5.2	Detailed Literature Review .....	71
5.2.1	City of Miramichi Economic Development and Tourism Department Operational Review .....	71
5.2.2	City of Miramichi Strategic Plan 2014 – 2019 .....	72
5.2.3	Miramichi Development Plan Review, .....	77
5.2.4	Miramichi Downtowns Redevelopment Master Plans.....	81
5.2.5	Food Tourism in Miramichi Region (Nov 2018).....	84
5.2.6	MRTA Product Experience Development Report – Jan 2019.....	85
5.2.7	Miramichi Region Population Growth Action Plan (2019).....	87



## List of Figures

Figure 1: Operational Review Recommendations .....	6
Figure 2: The Strategic Planning Process .....	6
Figure 3: The Economic Recovery Process .....	7
Figure 4 Map of Miramichi.....	11
Figure 5 Location Quotient values for selected services industries, Miramichi CA (Canada = 1.00) .	15
Figure 6 Population by year, Miramichi CA .....	16
Figure 7 Population Over the Age of 60 for Every 100 Under the Age of 20, Miramichi, CA .....	17
Figure 8 Population Over the Age of 60 for Every 100 Under the Age of 20, 2009 to 2019.....	18
Figure 9 Natural Population Change by Year, Miramichi, CA .....	19
Figure 10: Average Reported Employment Income, Miramichi and Benchmarks, 2017 .....	24
Figure 11: Employment Income Earners, Percentage Change 2003- 2017 .....	25
Figure 12: Persons Reporting Canada Pension Plan Income Percentage Change, 2012 to 2017 ....	26
Figure 13: Persons Reporting Canada Pension Plan Income per 100 with Employment Income.....	27
Figure 14: Persons Reporting Employment Insurance Income per 100 with Employment Income....	28
Figure 15: Percentage of persons with low income (2012 to 2017) .....	30
Figure 16: Median Employment Income by Industry Index, Miramichi CA (2018).....	31
Figure 17: Unemployment and Participation Rates 2009 to 2019, Miramichi, CA .....	33
Figure 18: Percentage change in the size of the labour market, 2014 to 2019.....	34
Figure 19: Employment by Industry 2016, City of Miramichi .....	36
Figure 20: Employment Change 1996 to 2016 (%), City of Miramichi .....	37
Figure 21: Location Quotient values for selected industries, Miramichi CA (2016), Canada = 1.00 ..	38
Figure 22: Share of the Workforce Over the Age of 55, Miramichi CA (2016).....	39
Figure 23: Breakdown of housing by ownership, 2016 (% of total) .....	42
Figure 24: Housing starts per 10,000 population (cumulative 2015-2019), .....	45
Figure 25: Apartment units built per 10,000 population (cumulative 2015-2019) .....	46
Figure 26: Expenditure categories for which Miramichi households spend more than the provincial average .....	49
Figure 27: Expenditure categories Miramichi households spend LESS provincial average .....	50
Figure 28: Comparison of household expenditures by origin (New Brunswick = 100%) .....	51
Figure 29: Miramichi Visitor Information Centre Origin of Travel Analysis - 2019 .....	62

## List of Tables

Table 1: Location Quotient values for selected services industries, Miramichi CA and benchmarks .	14
Table 2 Population growth/decline, Miramichi CA and benchmarks .....	16
Table 3 Population Estimates by Year, Miramichi CA communities.....	17
Table 4: Population change by selected source and year, Miramichi CA .....	20
Table 5: Population change by selected source (2019), Miramichi CA and benchmarks .....	21
Table 6: Migration in and out of Miramichi CA, Top sources and destination (2018) .....	22
Table 7: Migration in and out of Miramichi CA, selected jurisdictions (2018).....	22
Table 8: Average reported income, all sources, per tax filer (2017).....	23
Table 9: Average reported employment income, all sources, per tax filer (2017).....	24



Table 10: Self-employment Profile (2017), Miramichi and Benchmarks .....	29
Table 11: Median employment income by industry index, Miramichi CA (2018) .....	32
Table 12: Labour force indicators by year, Miramichi CA.....	33
Table 13: Employment by Industry 1996 to 2016, City of Miramichi .....	35
Table 14: Total Job Vacancies in the Third Quarter Each Year, by Economic Region.....	39
Table 15: Number of job advertisements by year, Miramichi .....	40
Table 16: Total job vacancies in the third quarter each year, by economic region .....	41
Table 17: Breakdown of housing by period of construction, 2016 (% of total).....	43
Table 18: Breakdown of housing/shelter by cost, 2016.....	44
Table 19: Housing starts by type and year, Miramichi CA.....	45
Table 20: 2019 Household Spend Summary, Miramichi .....	47
Table 21: Total Household Expenditure by Origin, 2019.....	48
Table 22: Business Counts in the City of Miramichi, All sectors by Employment Size .....	52
Table 23: Tourism-related business counts, Miramichi CA.....	53
Table 24: Manufacturing business counts, Miramichi CA.....	53
Table 25: Manufacturing business counts, Miramichi CA.....	54
Table 26: Transportation business counts, Miramichi CA .....	55
Table 27: Professional services business counts, Miramichi CA .....	56
Table 28: Construction-related business counts, Miramichi CA.....	57
Table 29 New Brunswick Provincial Travel Market Outlook 2019-2022 .....	58
Table 30: New Brunswick Accommodation Market Performance Results .....	59
Table 31: City of Miramichi Hotel/Motel Supply 2019.....	60
Table 32: City of Miramichi Hotel/Motel Market Performance Results.....	61



# 1 Introduction




The City of Miramichi completed an Operational Review of the Economic Development and Tourism Department in November 2019. The Operational Review included the following twelve recommendations in four theme areas:

**Figure 1: Operational Review Recommendations**

Structure
<ol style="list-style-type: none"> <li>1. Maintain Economic Development and Tourism as a single department</li> <li>2. Allocate a portion of the new accommodation levy to regional destination marketing programs and activities</li> <li>3. Issue a Request for Proposals for regional marketing services</li> </ol>
Principles
<ol style="list-style-type: none"> <li>4. Establish an Economic Development and Tourism Strategic Plan</li> <li>5. Foster a culture of cooperation, collaboration and communication</li> <li>6. Engage the local business community</li> </ol>
Programs
<ol style="list-style-type: none"> <li>7. Ensure Miramichi is investment ready</li> <li>8. Make Investment Attraction a priority</li> <li>9. Include People Attraction</li> </ol>
Processes and Performance
<ol style="list-style-type: none"> <li>10. Use technology to optimize operations</li> <li>11. Commit to economic development and tourism performance measures</li> <li>12. Focus the economic development and tourism efforts on the priority areas of investment attraction, business retention and expansion and tourism market readiness</li> </ol>

This report is the first step in fulfilling recommendation four; Establish an Economic Development and Tourism Strategic Plan. The strategic planning process as originally envisioned by the City of Miramichi included the following steps: research and analysis, consultation and priority setting and strategic plan development.

**Figure 2: The Strategic Planning Process**

Project Initiation	 <b>Research &amp; Analysis</b>	 <b>Consultation/ Priority Setting</b>	 <b>Strategic Plan Development</b>	Council Presentation
	Startup Meeting Document Review Economic & Statistical Analysis	Interviews Focus Group Online Survey Key Findings / Strategic Priorities Workshop	Draft Strategic Plan Final Strategic Plan Implementation Plan Tourism Marketing RFP	





The strategic planning process was in the early stages when the Province of New Brunswick declared a State of Emergency on March 19, 2020 to help contain the spread of COVID-19.

Beyond the health emergency, the COVID-19 pandemic has had an unprecedented global economic impact. The State of Emergency effectively shut down all non-essential businesses in the Province. The first stage of the easing of restrictions were announced in New Brunswick on April 24, 2019. Although the gradual easing of restrictions could be expected to continue for up to 18 months until a vaccine is developed. It also appears that the restrictions will vary by province and by country and could be reinstated if there are additional peaks in infections.

The City of Miramichi Economic Development and Tourism Strategy must acknowledge the unprecedented challenges as a result of the pandemic and identify new opportunities that may emerge. This exercise has therefore evolved to incorporate economic recovery in the short and medium term of the strategic plan.

While the COVID-19 pandemic is an unprecedented economic event, best practices in economic recovery plans from natural disasters provide some direction on an appropriate process to address the economic challenge. Economic Recovery Plans typically include three phases:

In Phase One, economic development organizations are focused on addressing immediate business needs to ensure they remain viable post-crisis. Phase Two is focused on providing stability for businesses as restrictions ease and they can begin to operate. In Phase Three the economic development organization helps businesses to adapt to the new normal and establish a vision post-crisis to recover and rebuild.

**Figure 3: The Economic Recovery Process**



This Background Discussion Report includes a literature review of previous strategies, policies and other reports to ensure the resulting strategy is aligned with Council's direction. Also in this report is an analysis of the economic and demographic data and trends in Miramichi. The report concludes with a summary of the key considerations for the development of Miramichi's Economic Development and Tourism Strategy.



Subsequent phases of the strategic planning process will include public consultation to ensure the plan reflects the insights and aspirations of the business community, residents, elected officials, community leaders and other community stakeholders.

## 2 Literature Review

This report includes a review of key strategic plans and policy documents that provide some direction and can be expected to influence Miramichi's Economic Development and Tourism Strategy. Key themes are summarized in this section with a more detailed review included in the appendix.

The following documents were incorporated into the literature review:

- **City of Miramichi Economic Development and Tourism Department Operations Review**, November 2019
- **City of Miramichi Strategic Plan 2014-2019**  
Background Report (2014)  
Summary of Recommendations and Strategic Focus Areas (2014)  
Strategic Plan (2014)  
Implementation Roundup (2014)
- **Miramichi Development Plan Review**  
My Miramichi Background Report (December 2018)  
What We Heard (August 2019)  
Municipal Plan By-Law No 109 (February 2020)  
PRAC Views – Municipal Plan and Zoning By-Law (February 2020)
- **Miramichi Downtowns Redevelopment Master Plans**  
The Vision Downtowns Redevelopment Master Plans, (October 2019)  
Miramichi Downtowns Backgrounder Report (November 2019)  
Miramichi Downtowns Master Plan Final Draft (November 2019)
- **Miramichi River Tourism Association (MRTA), Food Tourism in Miramichi Region**, (November 2018)
- **Miramichi River Tourism Association (MRTA) Product Experience Development Report**, (January 2019)
- **Miramichi Region Population Growth Action Plan** (2019)

The operational review included 12 recommendations in four theme areas to support the efficiency and effectiveness of the department. The recommendations included the establishment of an economic development and tourism strategy to clearly define the vision, goals, objectives and actions to be undertaken by the City. The report recommends maintaining the economic development and tourism staff together to facilitate a coordinated approach. Additional recommendations included greater collaboration with business and community stakeholders and a focus on business attraction, retention and expansion and resident attraction.

The report established a new approach to tourism by outsourcing tourism marketing to a regional tourism organization while city staff focus on product development and support for local operators. The operational review included several recommendations to improve investment readiness and





adoption of digital marketing and communications tools for both economic development and tourism efforts.

The City of Miramichi's Strategic Plan (2014- 2019) included an economic development pillar with specific actions for business retention and expansion, youth entrepreneurship, population growth, infrastructure investment, business and government relations and promotion. The report included detailed descriptions of regional tourism assets and events.

The Miramichi Development Plan Review (2019) identified key economic development and tourism assets to be highlighted and leveraged. It also identified some key considerations for the economic development and tourism strategy:

- Affordable housing and its impact on resident attraction
- Home business supports
- Tourism development and promotion
- Commercial development

The section on economic development highlights opportunities in workforce development, tourism, brownfield development, industrial designations and cannabis production.

The Downtowns Redevelopment Plan incorporates the two downtowns of Historic Chatham and Newcastle. These two downtowns and waterfronts are a unique element of the City of Miramichi. Recognizing this fact, the plan put an emphasis on placemaking to establish the downtowns as destinations with a mix of retail, restaurants, institutions, offices, recreational opportunities, residences and accommodation. The strategy includes ambitious plans for the redevelopment of public spaces in both downtowns' greenways, recreation and supporting parking areas.

The MRTA Food Tourism Strategy has two overriding objectives: the develop food tourism product and support operators to achieve market-readiness. The food offering is intended to align with the regional brand as "Atlantic Canada's Great Outdoors". The strategy includes a number of unique place-based food tastes and experiences, or "tastes of place," such as: local oysters, clams, fish, eel, molasses, berries and fiddleheads, as well as attending a riverside fish fry or lobster boil. The overriding basis for food tourism product development was identified as Miramichi Region's offer of strong ties between land, sea, rivers, and food, which are worth celebrating.

The MRTA Product Experience Development Report acknowledges some limitations in Miramichi's tourism offering including seasonality, limited wayfinding, and access to local foods. It also notes opportunities to expand Signature experiences and the need for additional rentals to assist visitors with experiencing the outdoors. The report includes a number of product development recommendations, including expanded evening activities, river-based activities, outdoor themed events. Creating events highlighting the First Nations and Acadian cultures, outdoor adventures, winter activities and luxury hotel & spa development were identified in the recommendations.

The Miramichi Population Growth Action Plan notes that the region has experienced a steady population decrease which, without intervention, could result in declining economic prospects. The three-year action plan targets net population growth of 787 people between 2019 and 2021. The plan includes 31 separate actions under three pillars: Come, Connect and Stay.



**Come** includes attraction activities, a streamlined process and targeted attraction for newcomer entrepreneurs, repatriation. Data collection and marketing and ensuring sufficient housing for new residents are also included. **Connect** includes consultation with local immigrants, newcomer supports, integration, and training programs. **Stay** includes sharing newcomer success stories, targeted programs for youth and students and newcomer entrepreneurs.

A more detailed review of the strategic plan and policy documents is included in the appendix.

## 3 Economic and Demographic Analysis

### 3.1 Introduction

This document provides an overview of recent economic and demographic trends in the Miramichi region. It then provides a high-level review of trends by industry sector before expanding on potential priority industries for development in the region. The report provides a summary of some key considerations from a tourism perspective. It concludes with a section on establishing priority sectors using an ecosystem approach and positioning the Miramichi as the urban hub for a wider region.

This report provides an overview of recent economic and demographic trends in the Miramichi region of New Brunswick. Most of the data provided is based on the Miramichi Census Agglomeration (CA) which includes the City of Miramichi, the parishes of Chatham, Derby, Glenelg, Nelson, Newcastle, Northesk and Southesk as well as the Big Hole Tract 8, Eel Ground 2 and Red Bank 4 First Nations. In total, this region has a population of just under 28,000 (2018). The City of Miramichi has a population of 17,500 (2016 Census). The section on job vacancies covers the Miramichi-Campbellton Economic Region which includes Northumberland, Gloucester and Restigouche counties. Finally, the review of business counts covers the City of Miramichi only.

For most of the report, the Miramichi data is compared to other small urban centres in Atlantic Canada including: Corner Brook (NL); Charlottetown and Summerside (PEI); Truro, New Glasgow and Cape Breton (NS) and Fredericton, Bathurst and Edmundston (NB).

### 3.2 Setting the context

The City of Miramichi and its urban region, the Census Agglomeration (CA) is an important urban centre within Atlantic Canada. It acts as the services hub for a region extending to Neguac and beyond to the north, Doaktown and Rogersville to the south as well as Baie-Sainte-Anne and Saint-Louis de Kent to the east and southeast. The City's population is 17,800, the urban centre population is 28,000 and the catchment area population is approximately 45,000<sup>1</sup>.

The City has many strengths including a base of natural resources and tourism assets. There are a number of larger, export-focused firms and economic development infrastructure assets such as the New Brunswick Community College and the Miramichi Airport.

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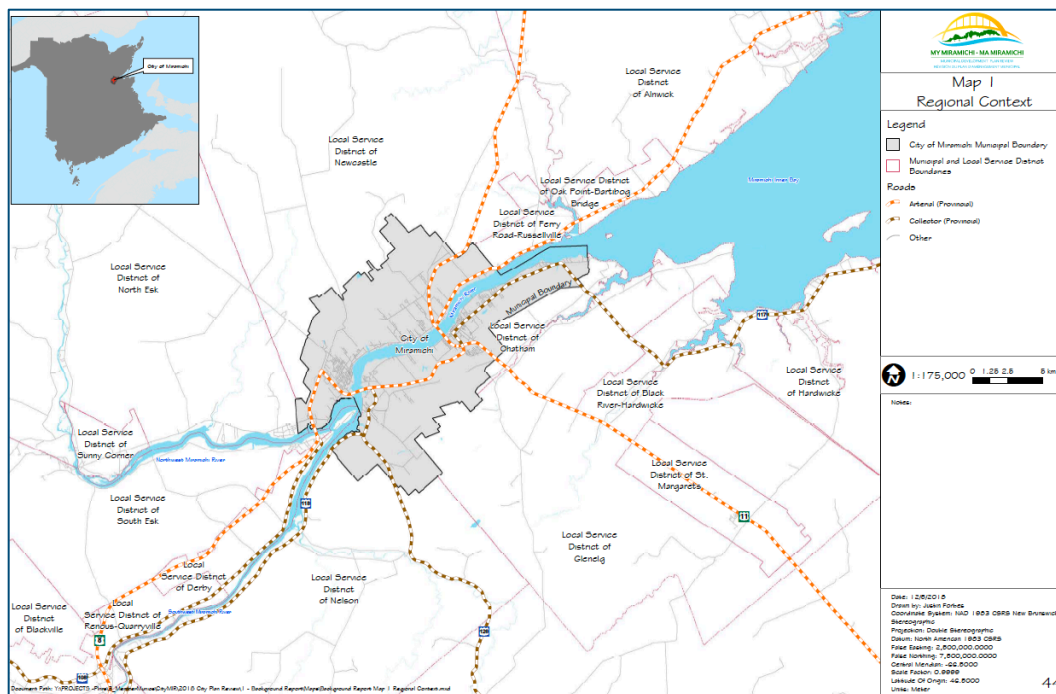
<sup>1</sup> Northumberland county approximates the city's catchment area and its population in 2019 was 45,500.



The nature of the economy in Miramichi is changing. Employment in manufacturing has dropped significantly in the past 20 years. This loss has been offset by some growth in service industries, but overall employment was lower in 2016 than back in 1996.

The workforce in Miramichi is aging. The number in the workforce over the age of 55 has increased significantly in the past decade. Nearly 40 percent of the community's entrepreneurs (self-employed) are over the age of 55 and will be looking to retire in the coming decade or so. The outlook for a number of the urban centre's key industries is uncertain.

**Figure 4 Map of Miramichi**



**Source: My Miramichi Municipal Plan, February 2020.**

### 3.3 Considerations: Covid-19 impacts

Covid-19 and its aftershocks is expected to impact economic conditions in Miramichi, across Canada and around the globe. The Conference Board of Canada is projecting a decline in Real GDP by 4.0 percent in 2020<sup>2</sup>.

Provincial and federal guidelines resulted in a dramatic drop in Canadian economic activity with a projected decline of close to five percent in consumer spending for the year. The Conference Board of Canada also forecasts decreased spending on machinery and equipment and decreased export and import activity.

<sup>2</sup> COVID-19 Slams Canada's Economy, Survey of Forecasters, April 22, 2020, <https://www.conferenceboard.ca/e-library/research/sof/2020/10692>, Accessed May 1, 2020.



There are several economic considerations on the impact of COVID-19 containment measures and the aftershocks for Miramichi:

#### **Local service industries**

- Business such as restaurants, accommodation services, personal services and retail will be subjected to measures that restrict their operations for an undetermined period. Some businesses will not survive the disruption.
- Service businesses will need to adopt new practices to accommodate physical distancing measures. Consumer confidence will be a consideration particularly in a community like Miramichi where one in four residents (those most vulnerable to the virus) is over the age of 65.
- COVID -19 has accelerated the adoption of digital technology and e-commerce. The Conference Board of Canada expects consumers and businesses will continue to rely on digital solutions even after the crisis has passed<sup>3</sup>.

#### **The tourism industry**

- The effect COVID-19 will have on the real estate market in the region is currently unknown and will largely depend on both the scale and longevity of the pandemic. Tourism, F&B and Retail sectors were the first impacted, due to the increased response by local and global authorities including home quarantine, restriction of travel and growing international concern.
- Within the accommodation market, history suggests that demand levels during previous shocks and economic downturns returned to pre-incident levels relatively quickly (within 12-15 months), but that the recovery of Average Daily Rate and RevPAR<sup>4</sup> lagged the demand recovery by at least 12 months. The current CBRE forecasts for Canada and the U.S. are suggesting a slightly more protracted recovery post Covid-19, with the industry taking upwards of 36 months, and recovering to 2019 levels of RevPAR performance by 2023.<sup>5</sup>
- Destination Canada is projecting a drop in traveler spending of 33 percent to 58 percent in 2020 compared to 2019. Travel restrictions are expected to limit international and interprovincial travel for some time. Miramichi is a hub for tourism activity in New Brunswick, particularly accommodation and food services and is expected to be impacted.
- Short-haul travel is expected to drive tourism's rebound due to consumer's lingering wariness of long-haul trips<sup>6</sup>.

#### **Attraction of immigrants**

- The growth in immigration has been a positive trend for Miramichi. It is likely to be significantly curtailed in 2020 and will have hangover effects in 2021 and possibly afterwards.

#### **Attraction of international students**

- International students are becoming an important part of the New Brunswick Community College (NBCC) student population. On April 24,

<sup>3</sup> COVID-19 Slams Canada's Economy, Survey of Forecasters, April 22, 2020, <https://www.conferenceboard.ca/e-library/research/sof/2020/10692>, Accessed May 1, 2020

<sup>4</sup> RevPAR refers to "Revenue per Available Room"

<sup>5</sup> CBRE Hotels

<sup>6</sup> COVID-19's Impact on Canadian Tourism, Domestic Travel, Destination Canada, March 23, 2020, <https://bit.ly/DestinationCanadaCOVID19>, Accessed May 1, 2020.



2020 NBCC was directed to begin planning for limited access to campuses.

#### **Export-focused manufacturing**

- Miramichi is home to a number of manufacturers that export product across Canada, the U.S. and beyond. Export and importing supply chains and demand have been significantly impacted. Recurring supply chain disruptions and protectionist measures may prompt businesses to consider distributed manufacturing and re-shoring strategies.
- Businesses may also adopt more flexible production measures such as 3D printing to address surges in demand.

#### **The business services industry**

- While not as large as some other communities in New Brunswick, Miramichi still has a relatively large workforce employed in business services/contact centres (including individuals working from home). These jobs will be impacted by Covid-19 throughout 2020 and likely in 2021. It is possible that more firms will boost their use of home-based workers, increasing the number of remote working jobs available in communities such as Miramichi.

#### **Public sector**

- As governments look to reduce deficits that emerge during the pandemic, urban centres such as Miramichi may be negatively impacted. However, it is also possible the government will look for 'shovel-ready' capital projects to stimulate the economy and the City should be prepared for those opportunities.
- Provincial and federal government programs are providing additional supports for businesses to respond to the COVID-19 crisis. Past economic recovery experience has shown an initial surge in senior government funding, followed by a retrenchment with greater reliance on municipal economic development initiatives in the longer term.

### **3.4 Miramichi as the urban hub for a wider region**

Most of the analysis in this report is based on data for the Miramichi Census Agglomeration (CA) area. However, it is important to note that Miramichi is the urban hub for a much wider catchment area (approximately 45,000). One important economic development opportunity over the longer term is to ensure residents of the wider area (from Rogersville to Neguac to Doaktown) drive into the City for services rather than turning south or southeast.

Table 1 shows a number of regional services and the Location Quotient (LQ) value for the Miramichi CA. The LQ value shows the concentration of employment in the City compared to the country overall adjusted for population size. For example, Miramichi has slightly less employment in food services and drinking places compared to the country overall (six percentage points less or an LQ value of 0.94). The chart also shows the LQ value for the median of benchmark communities reviewed in this report - Corner Brook (NL); Charlottetown and Summerside (PEI); Truro, New Glasgow and Cape Breton (NS) and Fredericton, Bathurst and Edmundston (NB).

As of the 2016 Census, Miramichi had much higher employment in repair and maintenance services, funeral services, and nursing and residential care. The community had relatively little employment in



IT services (computer systems design and related services) but that is common to the smaller urban centre communities reviewed in this study (benchmark communities).

**Table 1: Location Quotient values for selected services industries, Miramichi CA and benchmarks (Canada = 1.00)**

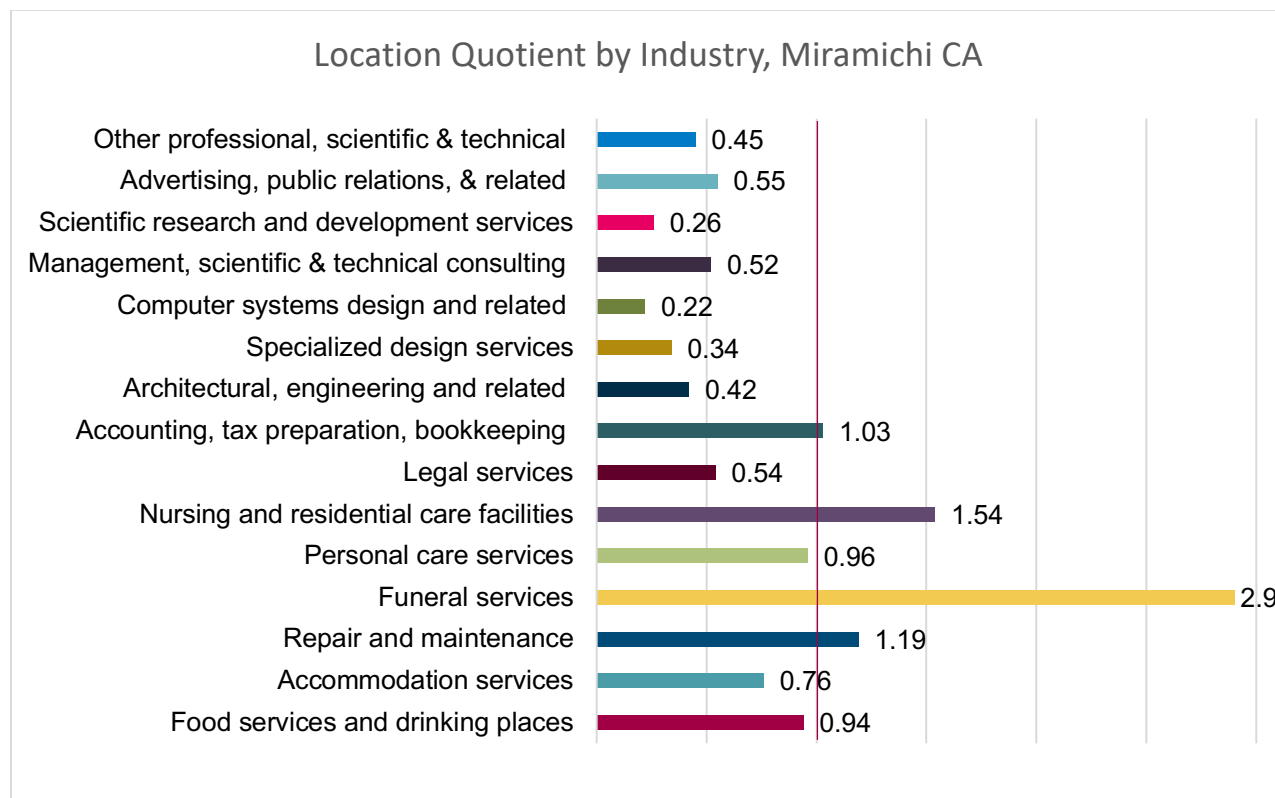
<i><b>Industry</b></i>	<i><b>Miramichi LQ value</b></i>	<i><b>Median LQ, benchmark communities</b></i>
<b>Food services and drinking places</b>	0.94	0.99
<b>Accommodation services</b>	0.76	1.31
<b>Repair and maintenance</b>	1.19	0.96
<b>Funeral services</b>	2.90	1.47
<b>Personal care services</b>	0.96	0.99
<b>Nursing and residential care facilities</b>	1.54	1.62
<b>Legal services</b>	0.54	0.64
<b>Accounting, tax preparation, bookkeeping and payroll services</b>	1.03	0.74
<b>Architectural, engineering and related services</b>	0.42	0.43
<b>Specialized design services</b>	0.34	0.29
<b>Computer systems design and related services</b>	0.22	0.25
<b>Management, scientific and technical consulting services</b>	0.52	0.43
<b>Scientific research and development services</b>	0.26	0.32
<b>Advertising, public relations, and related services</b>	0.55	0.30
<b>Other professional, scientific and technical services</b>	0.45	0.54

Source: Statistics Canada 2016 Census.





**Figure 5 Location Quotient values for selected services industries, Miramichi CA (Canada = 1.00)**



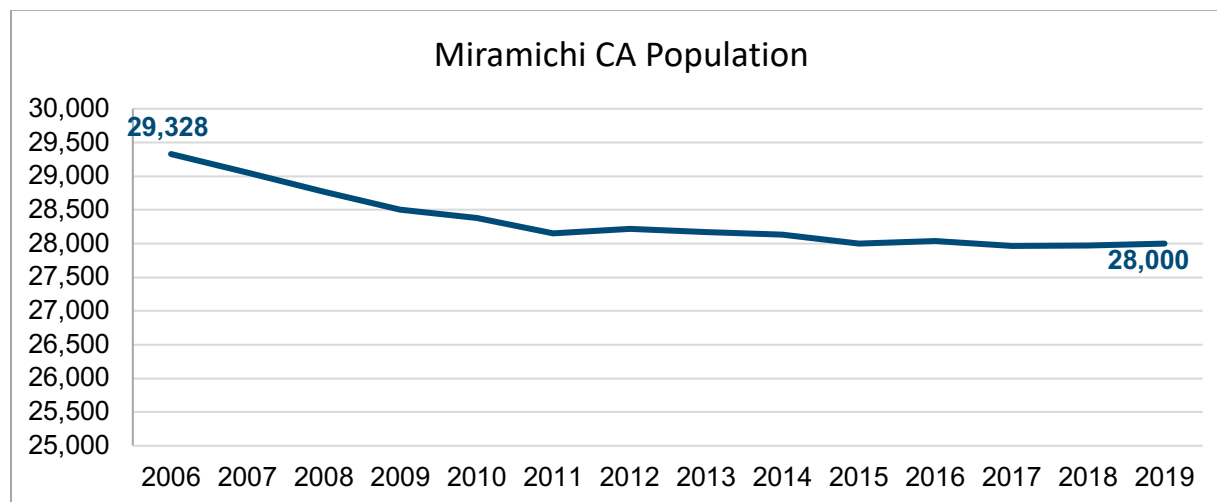
**Source: Mellor Murray Consulting, adapted from Statistics Canada 2016 Census.**

### 3.5 Population trends

In 2019, Statistics Canada estimates the population of the Miramichi CA to be 28,000. As shown in Figure 6, the Miramichi region's population has remained fairly consistent over the past decade. In 2009, the population was estimated to be 28,300.



Figure 6 Population by year, Miramichi CA



Source: Statistics Canada. Table 17-10-0135-01.

Table 2 shows the percentage change in the Miramichi region population over the past five and 10 year periods, compared to the benchmark jurisdictions. Five of the 10 jurisdictions have lost population over the past five years. The communities with the fastest growing populations are those with the highest rates of inward immigration. Charlottetown and Fredericton have witnessed robust population growth in recent years. Over the 10-year period, Miramichi ranks 7<sup>th</sup> out of the 10 locations for population growth/decline.

Table 2 Population growth/decline, Miramichi CA and benchmarks

Jurisdiction:	5-Year	10-Year
<b>Miramichi</b>	<b>-0.5%</b>	<b>-1.8%</b>
<b>Corner Brook</b>	-1.7%	+0.6%
<b>Charlottetown</b>	+14.4%	+23.2%
<b>Summerside</b>	+5.3%	+7.4%
<b>Truro</b>	+0.8%	+0.1%
<b>New Glasgow</b>	-2.3%	-4.8%
<b>Cape Breton</b>	-0.3%	-3.6%
<b>Fredericton</b>	+7.6%	+14.1%
<b>Bathurst</b>	0.0%	-2.1%
<b>Edmundston</b>	+0.7%	+0.1%

Source: Statistics Canada. Table 17-10-0135-01.

Statistics Canada publishes estimates of the municipality population each year. In 2019, the population in the City of Miramichi was estimated to be 17,823; essentially unchanged in the past five years. Table 3 shows the population trends in the municipalities that make up the Miramichi CA. The only community with significant growth has been the Eel Ground First Nation but it has a relatively small population of only 573.



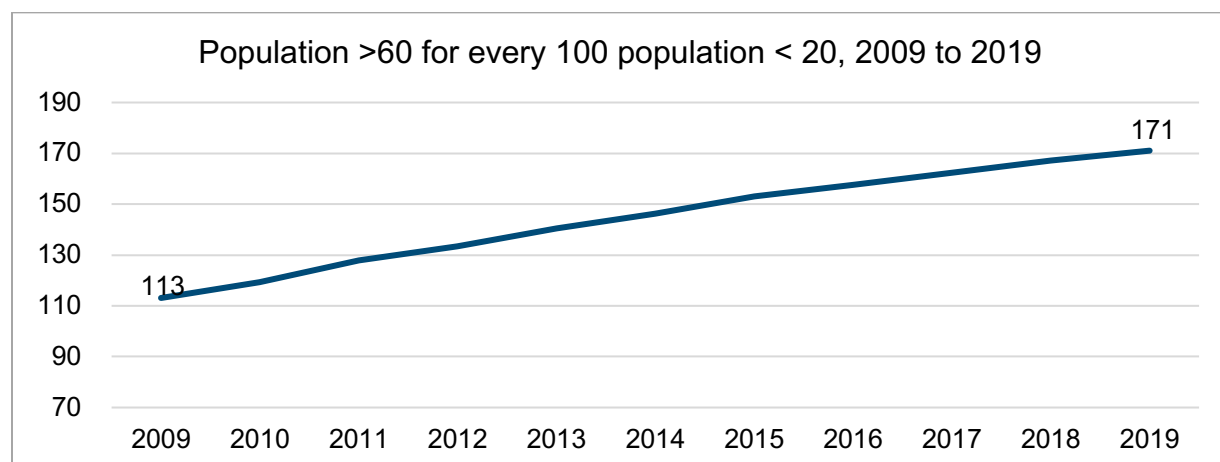
**Table 3 Population Estimates by Year, Miramichi CA communities**

Geography	2015	2016	2017	2018	2019	5-year % Change
<b>Miramichi (C)</b>	<b>17,836</b>	<b>17,860</b>	<b>17,760</b>	<b>17,740</b>	<b>17,823</b>	<b>0%</b>
Chatham (P)	507	522	530	528	515	+2%
Derby (P)	991	992	988	987	986	-1%
Glenelg (P)	1,605	1,588	1,606	1,610	1,573	-2%
Nelson (P)	939	982	962	962	947	+1%
Newcastle (P)	1,161	1,157	1,153	1,152	1,150	-1%
Northesk (P)	2,328	2,296	2,297	2,280	2,275	-2%
Southesk (P)	1,738	1,720	1,746	1,711	1,684	-3%
Big Hole Tract 8 (IRI)	46	49	49	49	49	+7%
Eel Ground 2 (IRI)	524	545	548	534	573	+9%
Red Bank 4 (IRI)	329	317	316	316	316	-4%

**C = city, P = Parish, IRI = First Nation. Source: Statistics Canada. Table 17-10-0142-01.**

The population over the age of 60 is rising rapidly in the Miramichi CA. In 2009 there were 113 people over the age of 60 living in Miramichi for every 100 people under the age of 20 (Figure 7). By 2019, that ratio had risen to 171 people over the age of 60 for every 100 under the age of 20. The number of workers entering the workforce is not replacing the number of older workers exiting the workforce. This decreasing number of young people coming through the education system and entering the workforce is a main reason for the tightening labour market, and many employers are struggling to find workers. This challenge is exacerbated by the relatively high usage of the Employment Insurance (EI) program as will be discussed in greater detail below.

**Figure 7 Population Over the Age of 60 for Every 100 Under the Age of 20, Miramichi, CA**



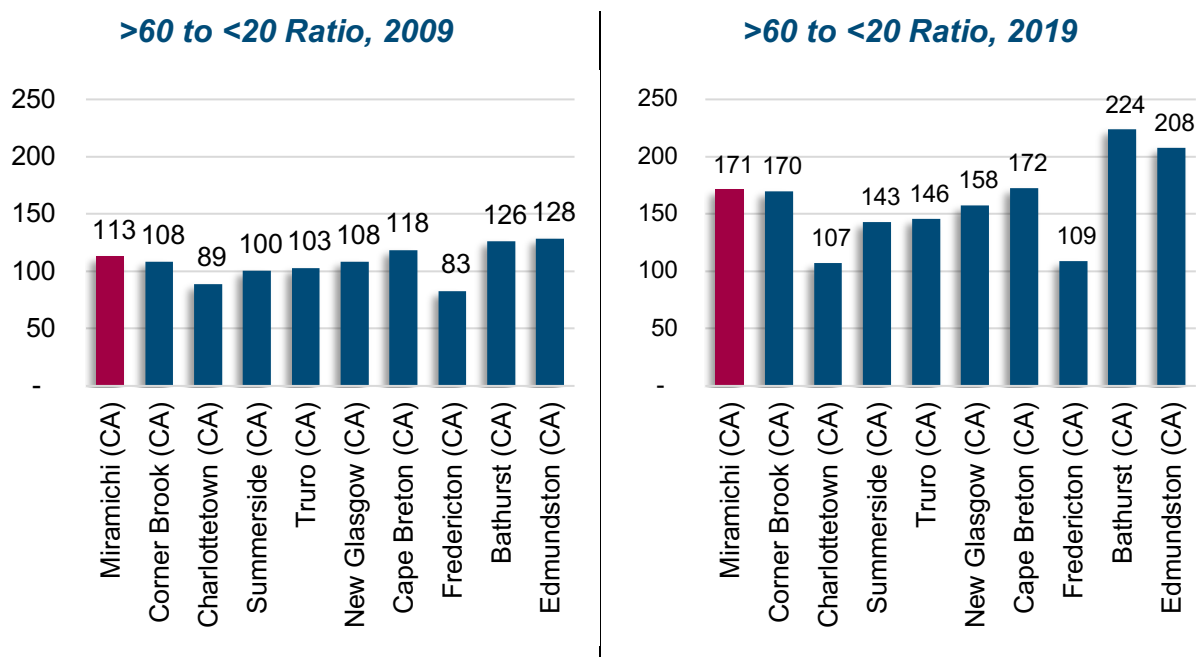
**Source: Statistics Canada. Table 17-10-0135-01.**



Figure 8 shows the comparison of the ratio of older to younger population for the benchmark communities. Miramichi ranks 7<sup>th</sup> among the 10 jurisdictions behind Cape Breton, Edmundston and Bathurst with 171 people over the age of 60 for every 100 under the age of 20.

Miramichi has experienced a 51 percent increase in the ratio of the population over 60 to that under 20 over the 10-year period. Miramichi ranked below Edmundston (62 percent) and well below Bathurst which has witnessed a 78 percent increase in the ratio of the population over 60 to that under 20. Again, Fredericton and Charlottetown have the lower ratio of old to young population mainly because they have attracted young people from elsewhere.

**Figure 8 Population Over the Age of 60 for Every 100 Under the Age of 20, 2009 to 2019 Miramichi, CA**



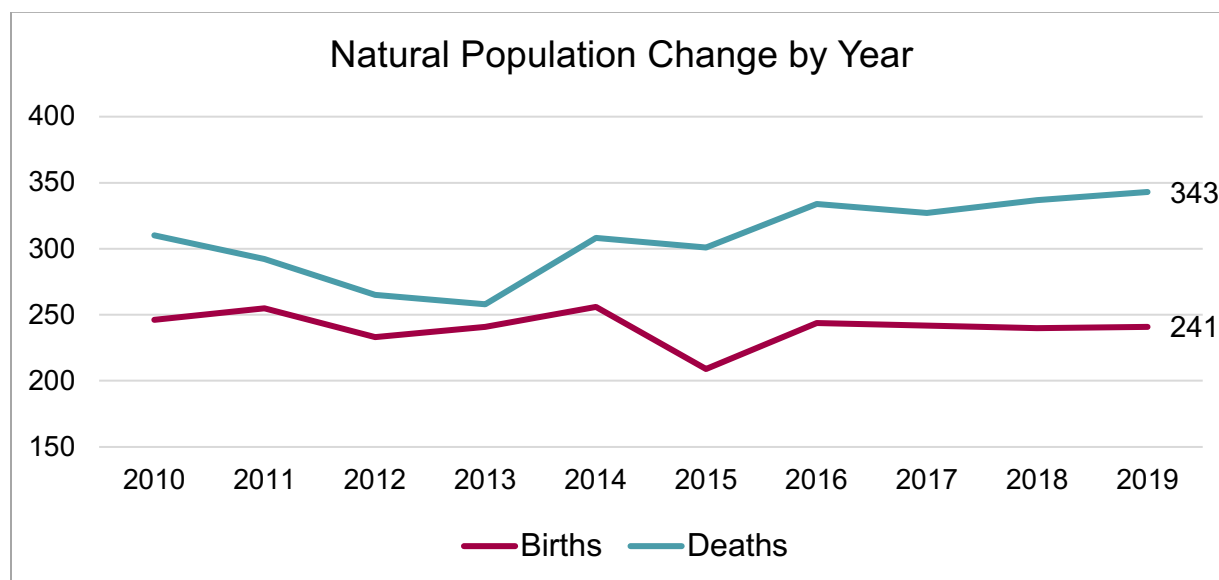
Source: Statistics Canada. Table 17-10-0135-01.

### Natural population growth

In the early 2000s, the Miramichi region had slightly more births than deaths each year. However, the ratio has turned negative (more deaths than births) since then. Since 2013, the gap between births and deaths has widened further as shown in Figure 9. In 2019, there were 343 deaths and 241 births across the urban centre.



**Figure 9 Natural Population Change by Year, Miramichi, CA**



Source: Statistics Canada. Table 17-10-0136-01.

The natural population growth rate in Miramichi was 70 births for every 100 deaths, adjusted for population size, in 2019. This rate was similar to those found in most of the benchmark communities with the exception of Charlottetown and Fredericton which both featured far more births than deaths (107 and 126 per 100 deaths respectively).

Table 4 shows the other main sources of population change for the Miramichi CA over the past decade. The number of immigrants settling in Miramichi rose fairly strongly in 2019 although the number of immigrants is still well below the larger urban centres in New Brunswick., Miramichi has attracted more people from other parts of Canada than it has lost in the past three years (see the more detailed assessment below) but its net intraprovincial migration rate is still slightly negative.



**Table 4: Population change by selected source and year, Miramichi CA**

	Source of Population	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
	Immigrants	22	47	13	17	13	16	27	27	58	84
	Net interprovincial migration	58	-11	6	-95	0	-82	-25	41	71	77
	Net intraprovincial migration	-100	-188	-55	-59	-117	-98	10	-49	-72	-44
	Net non-permanent residents	-24	-27	13	-13	-1	4	0	2	49	15

**Source: Statistics Canada. Table 17-10-0136-01.**





Table 5 compares Miramichi's population change to the benchmark communities. There are two tiers of communities for immigrant attraction in Atlantic Canada. Larger communities including Charlottetown, Fredericton, Moncton, Saint John, and Halifax are attracting immigrants at rates between 90 and 220 per 10,000 populations while the smaller urban centres such as Miramichi are attracting immigrants at rates around 20 to 30 per 10,000 population and below. Miramichi ranks fifth out of the 10 benchmark communities for its immigration rate in 2019.

Miramichi's net interprovincial migration (between provinces) rate in 2018 ranked second of the 10 benchmark communities, but its net intraprovincial migration (within New Brunswick) rate ranked eighth among the benchmark communities. Charlottetown and Cape Breton are attracting a considerable number of non-permanent residents which are likely temporary foreign workers.





**Table 5: Population change by selected source (2019), Miramichi CA and benchmarks (per 10,000 population)**

				
<i>Jurisdiction:</i>	<i>Immigrants</i>	<i>Net inter-provincial migration</i>	<i>Net intra-provincial migration</i>	<i>Net non-permanent residents</i>
<b>Miramichi (CA)</b>	<b>30</b>	<b>28</b>	<b>-16</b>	<b>5</b>
Corner Brook (CA)	23	-108	33	15
Charlottetown (CA)	227	-78	6	82
Summerside (CA)	92	83	55	21
Truro (CA)	19	15	24	27
New Glasgow (CA)	23	23	-15	-3
Cape Breton (CA)	21	-9	-25	222
Fredericton (CA)	124	-40	51	25
Bathurst (CA)	30	11	-12	34
Edmundston (CA)	36	-12	8	32

**Source: Statistics Canada. Table 17-10-0136-01.**

Statistics Canada published detailed data on migration patterns for 2018<sup>7</sup>. This data indicates an interesting pattern of where people moving to Miramichi are coming from and where those moving from Miramichi are going (Table 6). In 2018, there were more people moving to Miramichi from other parts of the province and country than there were moving out. The top source of inward population was non-CMA/CA areas of New Brunswick. Much of this growth is likely from the wider rural area around Miramichi. Moncton was the second largest source of inward migration followed by Fredericton and Bathurst. Most of those moving out were headed for rural areas in New Brunswick along with Moncton and Fredericton. Halifax is a top destination for outward migrants with 29 leaving for that City in 2018.

<sup>7</sup> This data is not available for other years



**Table 6: Migration in and out of Miramichi CA, Top sources and destination (2018)**

<i>Top destinations – Those moving out:</i>		<i>Top sources – Those moving in:</i>	
Non-CMA/CA, New Brunswick	156	Non-CMA/CA, New Brunswick	207
Moncton (CMA), New Brunswick	132	Moncton (CMA), New Brunswick	72
Fredericton (CA), New Brunswick	103	Fredericton (CA), New Brunswick	43
Saint John (CMA), New Brunswick	43	Bathurst (CA), New Brunswick	36
Halifax (CMA), Nova Scotia	32	Non-CMA/CA, Alberta	35
Ottawa – Gatineau (CMA)	29	Toronto (CMA), Ontario	23
Bathurst (CA), New Brunswick	21	Saint John (CMA), New Brunswick	21
Edmonton (CMA), Alberta	21	Non-CMA/CA, Ontario	17
Non-CMA/CA, Nova Scotia	20	Ottawa – Gatineau (CMA)	15
Toronto (CMA), Ontario	16	Halifax (CMA), Nova Scotia	14
Non-CMA/CA, Alberta	13	Hamilton (CMA), Ontario	14
Calgary (CMA), Alberta	13	Calgary (CMA), Alberta	14
Charlottetown (CA), Prince Edward Island	12	Edmonton (CMA), Alberta	14

**Source: Statistics Canada. Table 17-10-0141-01.**

Table 7 compares the migration pattern for a number of jurisdictions. In 2018, Miramichi had a positive migration rate (more moving in than out) with Toronto and Calgary. However, Miramichi had a negative migration rate with Moncton, Fredericton, Ottawa, Saint John and Halifax.

**Table 7: Migration in and out of Miramichi CA, selected jurisdictions (2018)**

<i>Jurisdiction:</i>	<i>Moving out</i>	<i>Moving in</i>	<i>Net change</i>	<i>Jurisdiction:</i>	<i>Moving out</i>	<i>Moving in</i>	<i>Net change</i>
Non-CMA/CA, NB	156	207	+51	Edmonton (CMA), AB	21	14	-7
Moncton (CMA), NB	132	72	-60	Non-CMA/CA, NS	20	12	-8
Fredericton (CA), NB	103	43	-60	Toronto (CMA), ON	16	23	+7
Saint John (CMA), NB	43	21	-22	Non-CMA/CA, AB	13	35	+22
Halifax (CMA), NS	32	14	-18	Calgary (CMA), AB	13	14	+1
Ottawa – Gatineau (CMA)	29	15	-14	Charlottetown (CA), PE	12	9	-3
Bathurst (CA), NB	21	36	+15				

**Source: Statistics Canada. Table 17-10-0141-01.**



### 3.6 Income trends

In 2017 there were 22,320 residents of the Miramichi CA who declared income (any source) on their annual tax form. As shown in Table 8, the average reported income from all sources in Miramichi was \$39,847 (this includes retirees, students and those without employment). The average reported income in Miramichi was 19 percent lower than the rest of Canada, but that was higher than six of the benchmark locations. Between 2008 and 2017, the average reported income rose by 17 percent for an annual growth rate of 1.9 percent. Miramichi ranked 9<sup>th</sup> out of the 10 jurisdictions for average reported income growth.

As shown in Table 8, the average reported employment income increased much faster than the national growth rate, meaning that income growth from other sources (CPP, pensions, etc.) increased more slowly.

Only Corner Brook and Summerside witnessed faster growth in the average reported employment income between 2008 and 2017. The average annual growth rate in Miramichi was slightly higher than three percent. Despite this growth, the average employment income is still 20 percent below the national level ranking Miramichi 7<sup>th</sup> among the 10 benchmark locations (Table 8).

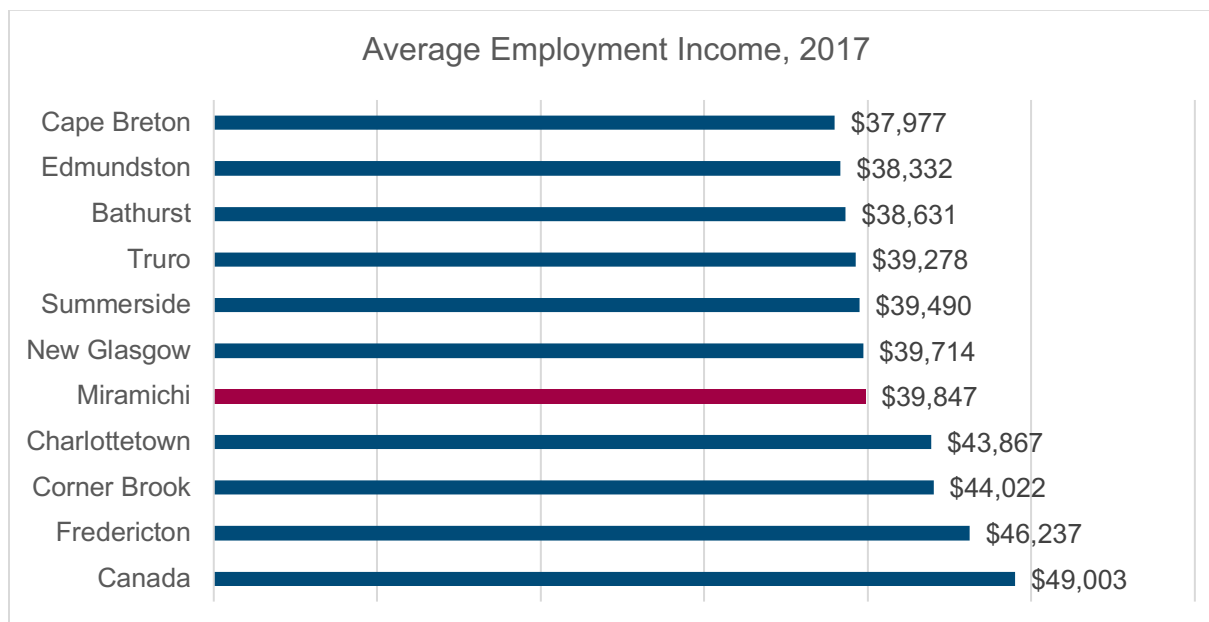
**Table 8: Average reported income, all sources, per tax filer (2017)**

<b>Jurisdiction</b>	<b>2017</b>	<b>Compared to Canada</b>	<b>2008-2017 % change</b>
Canada	\$49,003		20%
Fredericton	\$46,237	-6%	21%
Corner Brook	\$44,022	-10%	34%
Charlottetown	\$43,867	-10%	23%
<b>Miramichi</b>	<b>\$39,847</b>	<b>-19%</b>	<b>17%</b>
New Glasgow	\$39,714	-19%	22%
Summerside	\$39,490	-19%	28%
Truro	\$39,278	-20%	21%
Bathurst	\$38,631	-21%	19%
Edmundston	\$38,332	-22%	25%
Cape Breton	\$37,977	-23%	23%

**Source: Statistics Canada Table: 11-10-0007-01.**



**Figure 10: Average Reported Employment Income, Miramichi and Benchmarks, 2017**



**Source: Statistics Canada Table: 11-10-0007-01.**

Rising average employment income is a positive trend in general but it can also point to a tightening labour market. If wages increase to the point that business investment is lost, it can hurt the economy over time. Fredericton's average employment income growth rate was well below Miramichi. This difference in incomes could indicate a tightening labour market in Miramichi.

**Table 9: Average reported employment income, all sources, per tax filer (2017)**

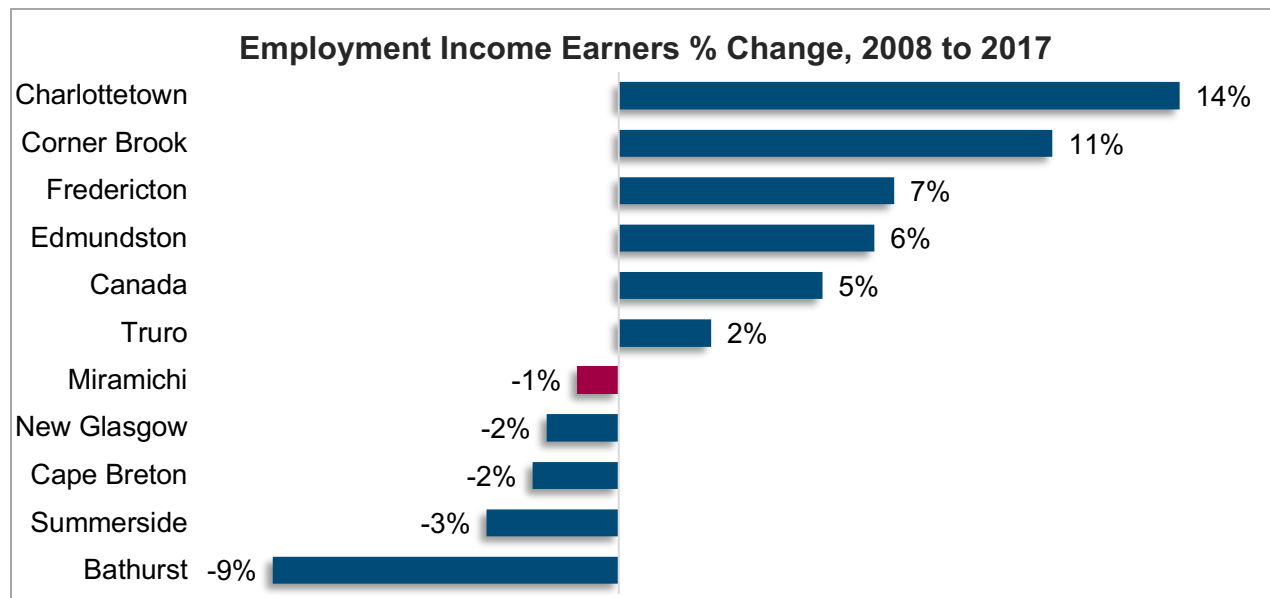
	2017	Compared to Canada	2008-2017 % change
Canada	\$47,302		17%
Fredericton	\$43,764	-7%	18%
Corner Brook	\$42,872	-9%	32%
Charlottetown	\$39,865	-16%	20%
<b>Miramichi</b>	<b>\$38,003</b>	<b>-20%</b>	<b>27%</b>
Truro	\$37,109	-22%	19%
Bathurst	\$36,898	-22%	12%
Edmundston	\$36,841	-22%	20%
Cape Breton	\$36,424	-23%	18%
Summerside	\$36,346	-23%	28%
New Glasgow	\$35,834	-24%	15%

**Source: Statistics Canada Table: 11-10-0007-01.**



Figure 11 shows the change in the number of employment income earners between 2012 and 2017 for Miramichi and benchmark locations. Miramichi experienced a slight decline of one percent in the number of people reporting employment income compared to a strong five percent growth across the country. Charlottetown and Corner Brook had the fastest growth in this category. Bathurst saw a nine percent decline in the number of employment income earners in just five years.

**Figure 11: Employment Income Earners, Percentage Change 2003- 2017**

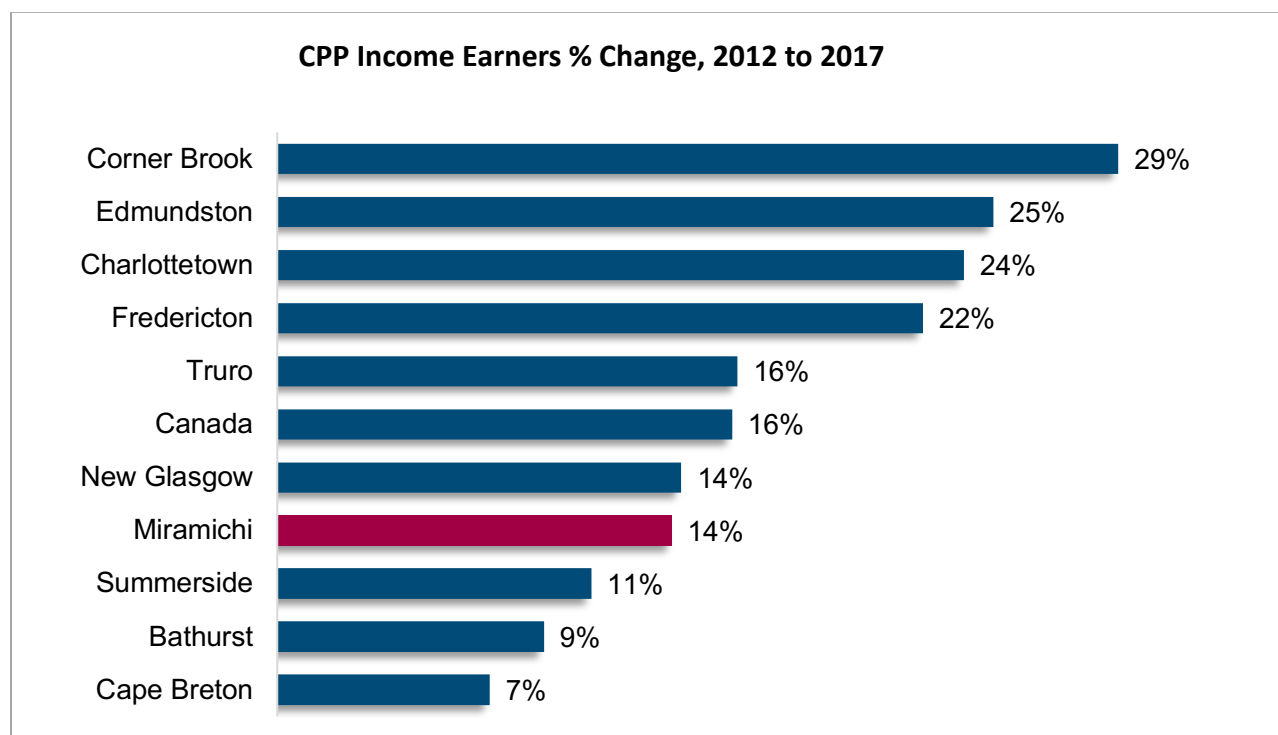


**Source: Statistics Canada Table: 11-10-0007-01.**

Conversely there was a steep increase in the number of people reporting Canada Pension Plan (CPP) income in just the past five years. There was a 14 percent rise in those receiving CPP between 2012 and 2017 in Miramichi but Miramichi's increase was actually below the average among the benchmark communities. Edmundston saw a 25 percent spike in the number of people reporting CPP (Figure 12).



**Figure 12: Persons Reporting Canada Pension Plan Income Percentage Change, 2012 to 2017**



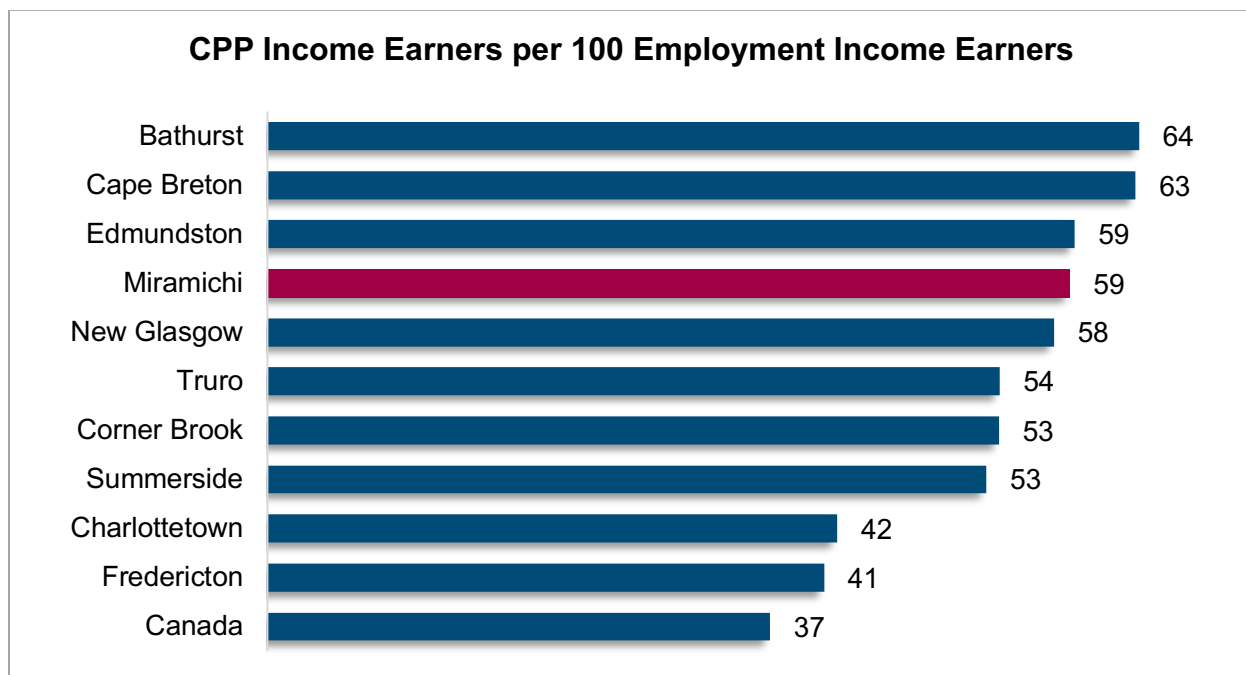
**Source: Statistics Canada Table: 11-10-0007-01.**

As shown in Figure 13, there are 59 people in Miramichi reporting CPP income for every 100 persons reporting employment income. This ratio increased from 40 reporting CPP for every 100 with employment income in 2008 and it is set to rise even faster in the coming years as more people exit the workforce. Miramichi could have as many people earning CPP as employment income within a decade with the current trajectory. Miramichi ranks 7<sup>th</sup> out of the 10 benchmark communities for this ratio.





**Figure 13: Persons Reporting Canada Pension Plan Income per 100 with Employment Income**



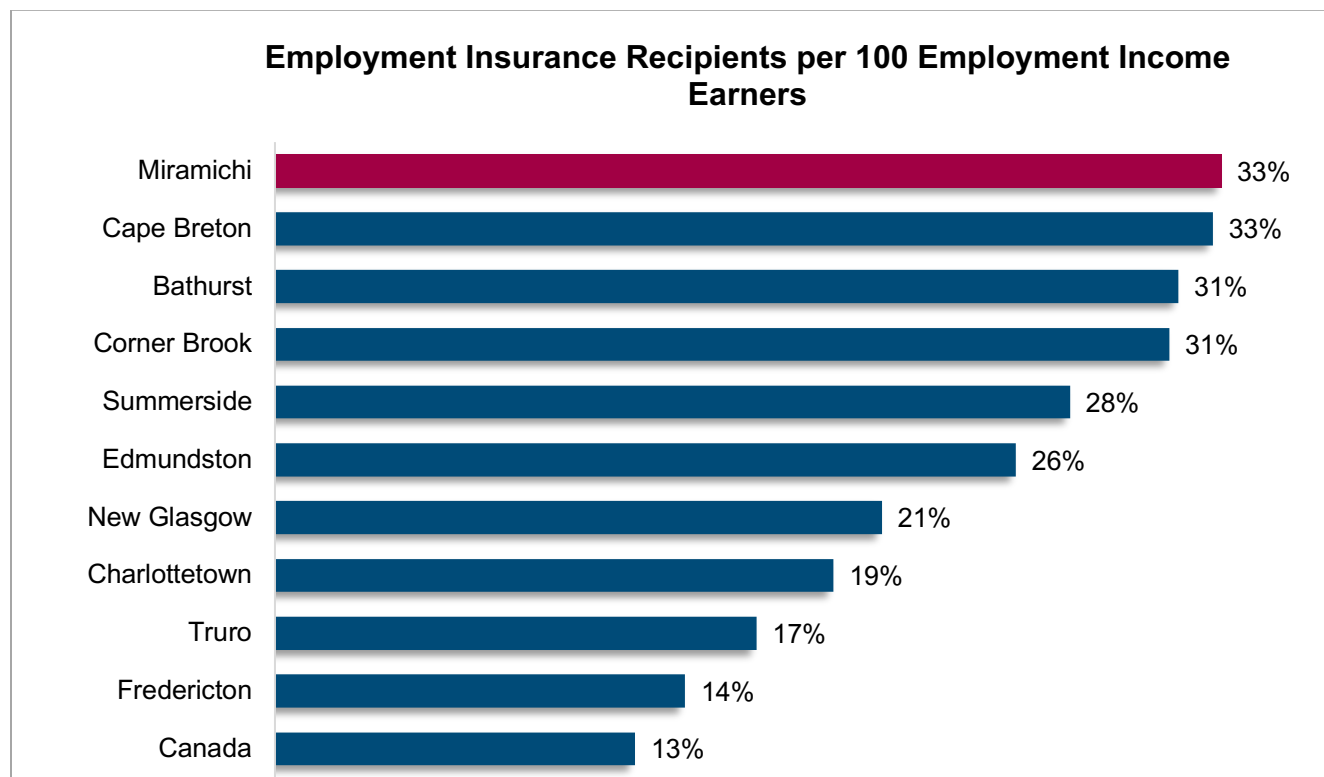
**Source: Statistics Canada Table: 11-10-0007-01.**

One of the other challenges facing Miramichi is the relatively high usage of the Employment Insurance (EI) program. Despite a drop in the number of people reporting employment income, there were actually 17 percent more people reporting EI income in 2017 compared to 2012. As shown in Figure 14 below, one-third of all employment income earners in 2017 also reported EI income during the year.

Miramichi has the highest EI rate among the 10 benchmark communities. The high EI usage rate distorts the labour market picture in Miramichi as it artificially inflates the unemployment situation. Many of the people who are unemployed in any given month are actually not available for work as they are waiting for their seasonal job to begin.



**Figure 14: Persons Reporting Employment Insurance Income per 100 with Employment Income**



**Source: Statistics Canada Table: 11-10-0007-01.**

Miramichi traditionally had a lower rate of self-employment than most other urban centres due to a greater reliance on larger firms such as forest products mills and the public sector. In 2017 eight percent reported self-employment income compared to 15 percent across the country. Some of this difference is due to Miramichi's small agriculture sector compared to other jurisdictions. The agriculture sector which has high rates of self-employment.

The average self-employment income in Miramichi was below the average of the benchmark communities. Also, the number of people reporting self-employment remained constant in Miramichi over the past five years but rose in most of the benchmark communities (Table 10).



**Table 10: Self-employment Profile (2017), Miramichi and Benchmarks**

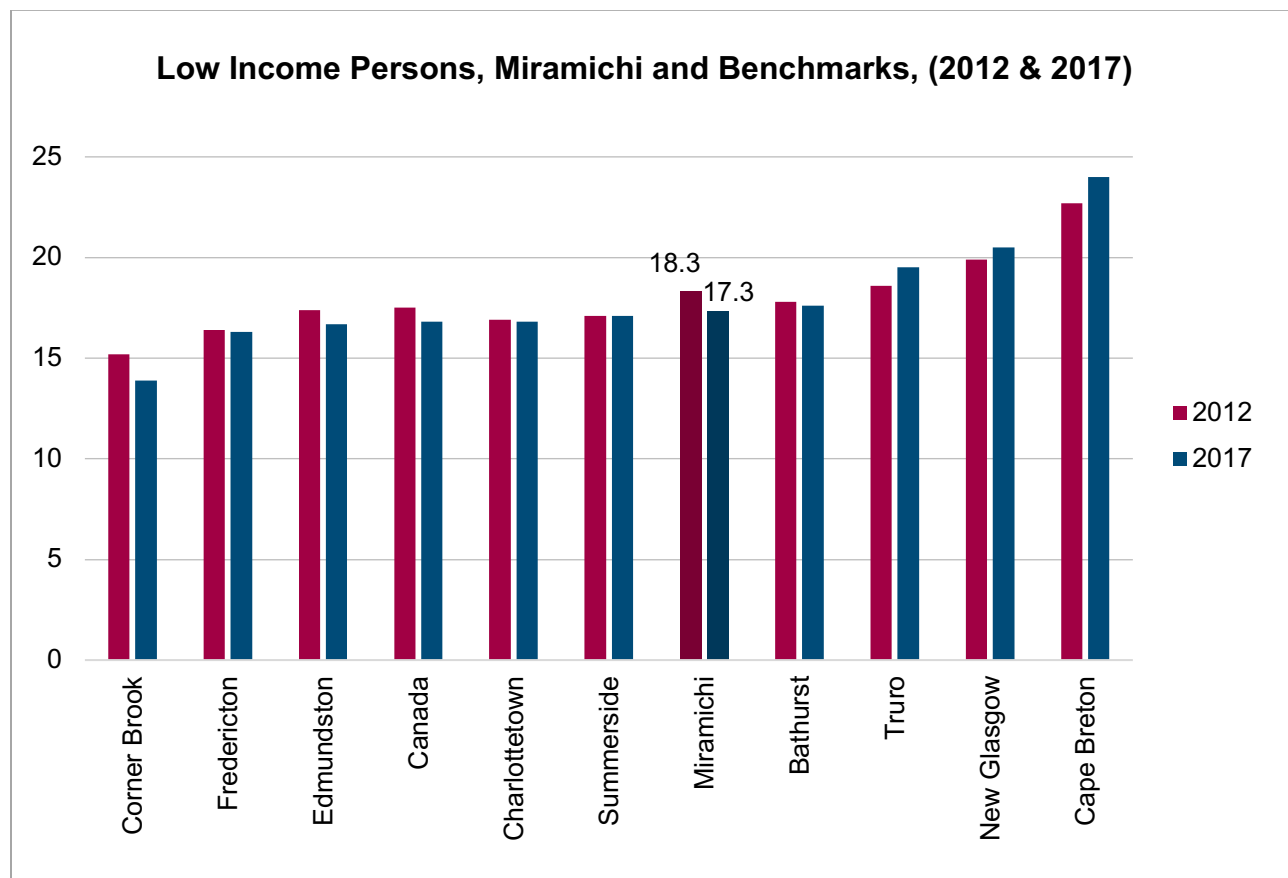
<b>Jurisdiction:</b>	<b>% with self-employment income</b>	<b>Avg. self-employment income</b>	<b>5-Year % change, persons with self-employment income</b>
<b>Canada</b>	15%	\$17,112	+5%
Charlottetown	13%	\$14,912	+19%
Truro	12%	\$12,563	+5%
Fredericton	11%	\$14,738	+10%
Summerside	11%	\$12,781	-3%
Edmundston	10%	\$13,387	+14%
New Glasgow	9%	\$10,385	+3%
<b>Miramichi</b>	<b>8%</b>	<b>\$13,329</b>	<b>0%</b>
Corner Brook	8%	\$19,230	+17%
Bathurst	8%	\$16,762	-7%
Cape Breton	7%	\$22,255	+4%

**Source: Statistics Canada Table: 11-10-0007-01.**

Just over 17 percent of the population in Miramichi are considered to be living below the poverty line as measured by the Census Family Low Income Measure (CFLIM-AT). This rate was down slightly from 18.3 percent in 2012. Across Canada, the low-income rate was 16.8 percent in 2017, slightly below the level in Miramichi (Figure 15).



Figure 15: Percentage of persons with low income (2012 to 2017)



After-tax low-income status of tax filers and dependents based on Census Family Low Income Measure (CFLIM-AT)

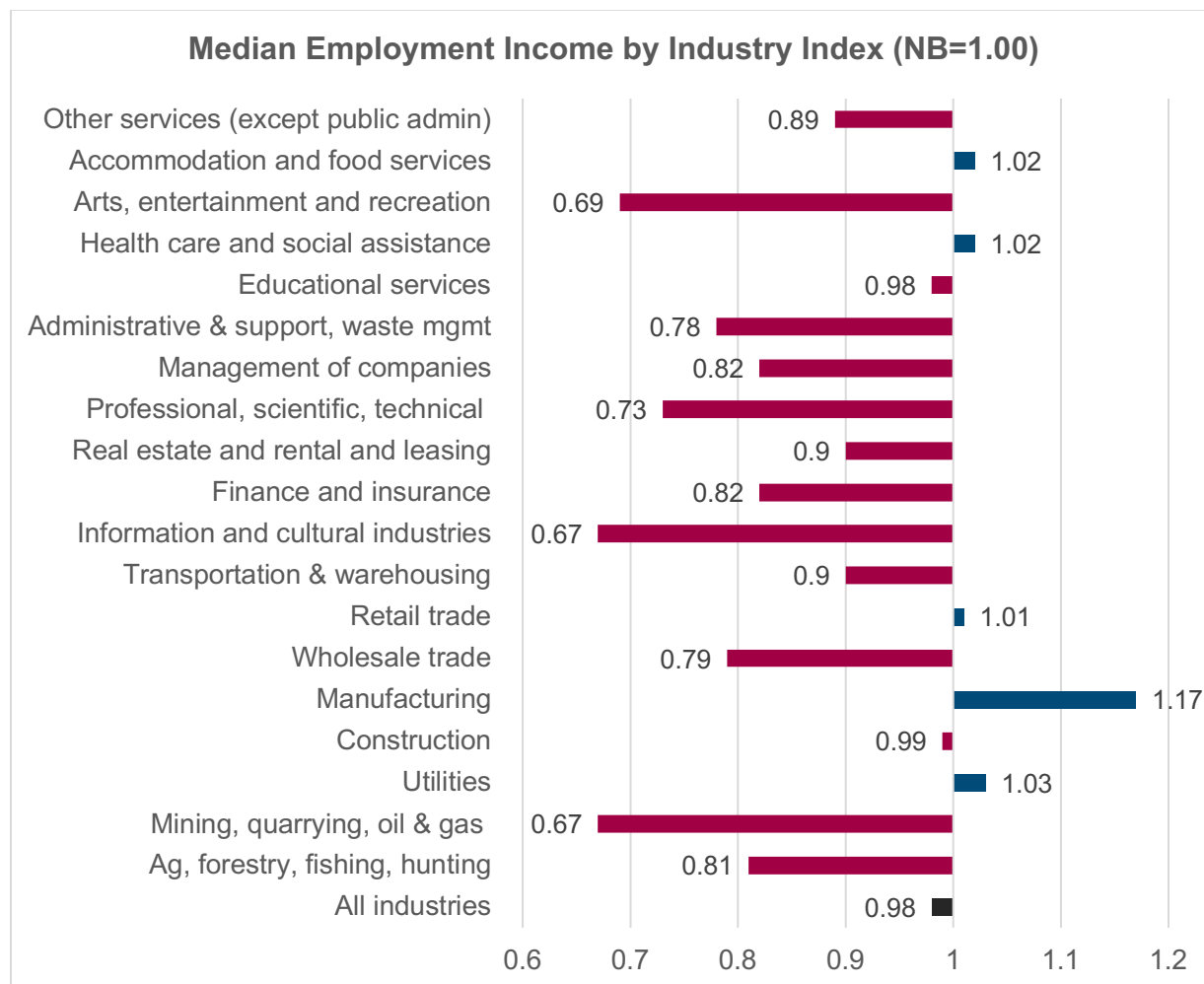
Source: Statistics Canada. Table 11-10-0018-01.

Overall, Miramichi's median wage is comparable to the benchmark communities. It does not have a median wage advantage compared to the rest of New Brunswick. The City has a lower operating cost structure compared to the country overall (wage levels, land costs, etc.) but when it comes to a comparison with other communities in New Brunswick, median wage levels in Miramichi are about average (98 percent of the provincial median wage across all industries).

Figure 16 shows that median wages are higher in Miramichi in Manufacturing, Retail trade, Health care and social assistance, Accommodation and food services and Public administration compared to the provincial overall.



**Figure 16: Median Employment Income by Industry Index, Miramichi CA (2018)**



Source: Adapted by Mellor Murray Consulting from Statistics Canada Table: 11-10-0073-01.



**Table 11: Median employment income by industry index, Miramichi CA (2018)**

<b>Industry:</b>	<b>Index (NB = 1.00)</b>
<b>All industries</b>	0.98
Agriculture, forestry, fishing and hunting	0.81
Mining, quarrying, and oil and gas extraction	0.67
Utilities	<b>1.03</b>
Construction	0.99
Manufacturing	<b>1.17</b>
Wholesale trade	0.79
Retail trade	<b>1.01</b>
Transportation and warehousing	0.90
Information and cultural industries	0.67
Finance and insurance	0.82
Real estate and rental and leasing	0.90
Professional, scientific and technical services	0.73
Management of companies and enterprises	0.82
Administrative and support, waste management	0.78
Educational services	0.98
Health care and social assistance	<b>1.02</b>
Arts, entertainment and recreation	0.69
Accommodation and food services	<b>1.02</b>
Other services (except public administration)	0.89
Public administration	<b>1.03</b>

**Source: Statistics Canada Table: 11-10-0073-01.**

### 3.7 Labour market trends

There were an estimated 12,900 people active in the Miramichi workforce during an average month in 2019. These are people who are either working or actively seeking employment. As shown in Table 12, the size of the workforce hasn't changed much in the past decade. There were 12,000 people active in the workforce in 2009. The number of employed persons during an average month in 2018 was 11,400; down from the recent peak of 13,100 in 2014.

The number of people unemployed in 2019 was up slightly from 2018. The unemployment rate had been slowly declining in recent years but rose in 2019 to 12.4 percent. The participation rate (the share of the population working or actively looking for work) peaked in 2014 at 63 percent. It decreased to its lowest level in the past decade to 55.6 percent in 2019.



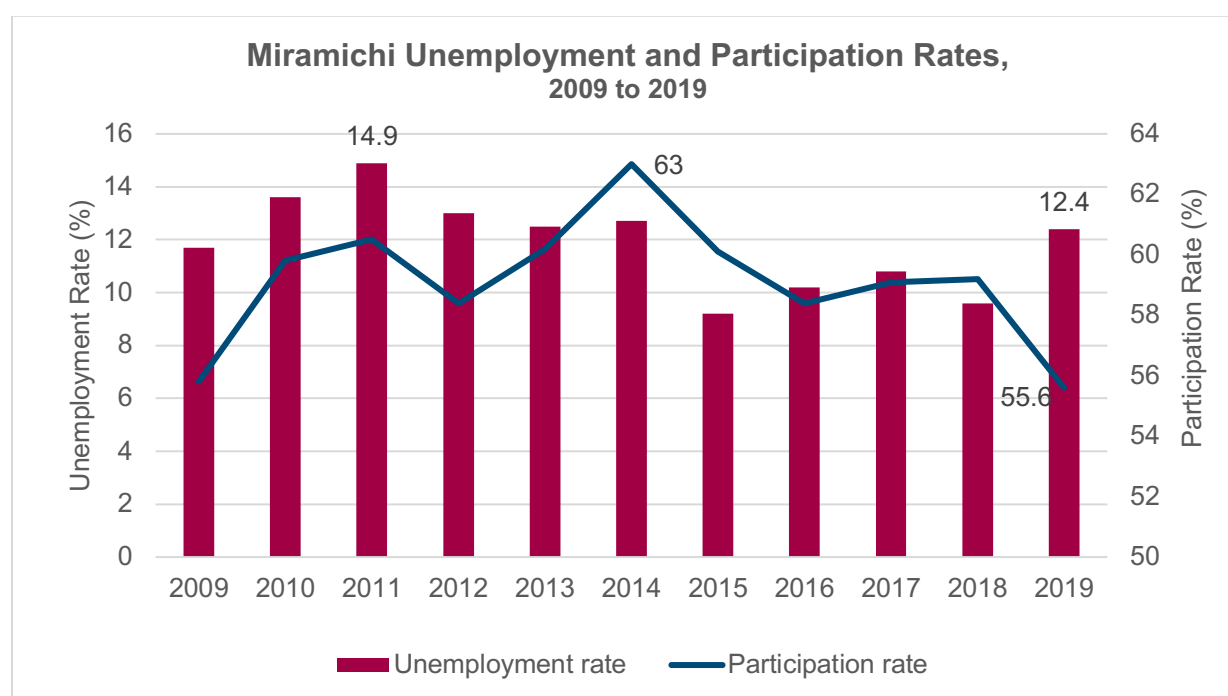


**Table 12: Labour force indicators by year, Miramichi CA**

<i>Labour force characteristic:</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<i>Labour force (x 1,000)</i>	12.0	12.5	10.1	10.8	11.2	15.0	13.1	12.8	13.9	12.5	12.9
<i>Employment (x 1,000)</i>	10.5	10.7	8.6	9.4	9.8	13.1	11.9	11.5	12.4	11.4	11.4
<i>Unemployment (x 1,000)</i>	1.4	1.7	1.5	1.4	1.4	1.9	1.2	1.3	1.5	1.2	1.6
<i>Unemployment rate (%)</i>	11.7	13.6	14.9	13.0	12.5	12.7	9.2	10.2	10.8	9.6	12.4
<i>Participation rate (%)</i>	55.8	59.8	60.5	58.4	60.2	63.0	60.1	58.4	59.1	59.2	55.6
<i>Employment rate (%)</i>	48.8	51.2	51.5	50.8	52.7	55.0	54.6	52.5	52.8	54.0	49.1

Source: Statistics Canada Table: 14-10-0102-01.

**Figure 17: Unemployment and Participation Rates 2009 to 2019, Miramichi, CA**

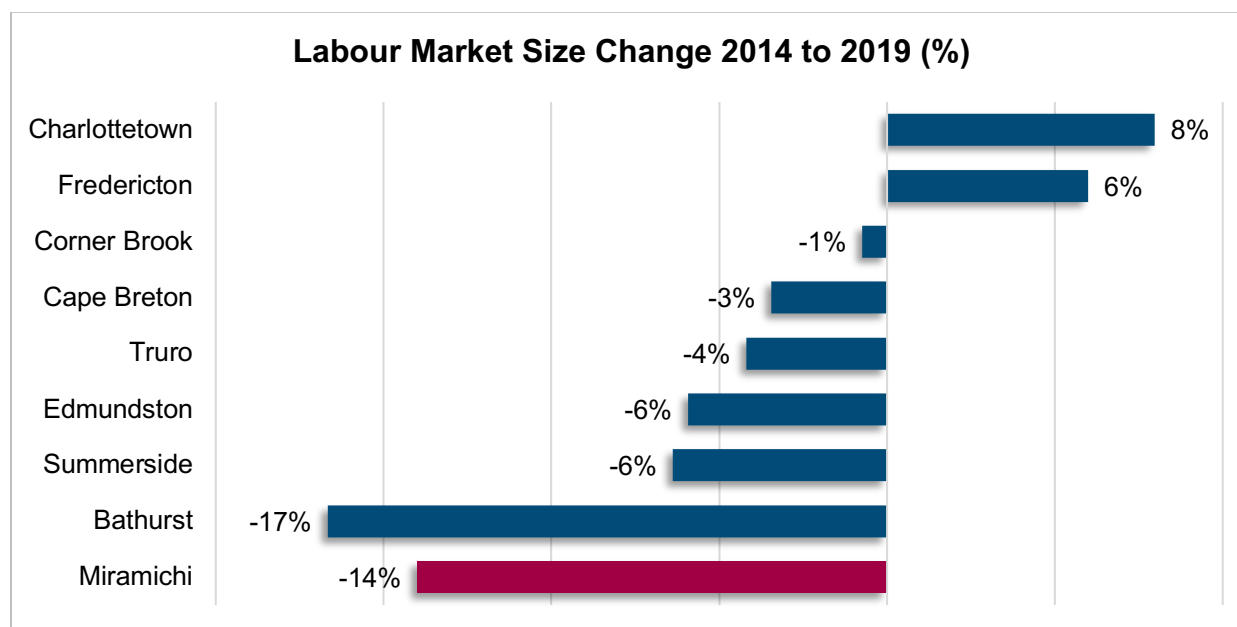


Source: Mellor Murray Consulting, Adapted from Statistics Canada Table: 14-10-0102-01.

Comparing the five-year percentage change (Figure 18), the labour market in Miramichi decreased by 14 percent with only Bathurst registering a steeper decline. However, 2015 was an outlier in for Miramichi's workforce. The size of the Miramichi workforce increased by eight percent over the past decade.



**Figure 18: Percentage change in the size of the labour market, 2014 to 2019**



**Source: Statistics Canada Table: 14-10-0102-01.**

For a longer-term view of employment by industry, Table 13 provides a summary of employment by industry trends between 1996 and 2016<sup>8</sup>. The most notable change has been the decline in manufacturing, much of this related to forest products. There were 1,330 workers in the manufacturing sector in 1996 and only 470 in 2016. The loss of manufacturing jobs accounted for almost all net employment decline between 1996 and 2016. All other sectors combined only shed a net 110 jobs.

Growth sectors over the 20-year period included public administration. The growth in public administration was mostly related to the payroll centre, (otherwise public administration employment would be considerably lower), construction, health care and other services.

<sup>8</sup> This analysis is based on the Census data in each of those years.



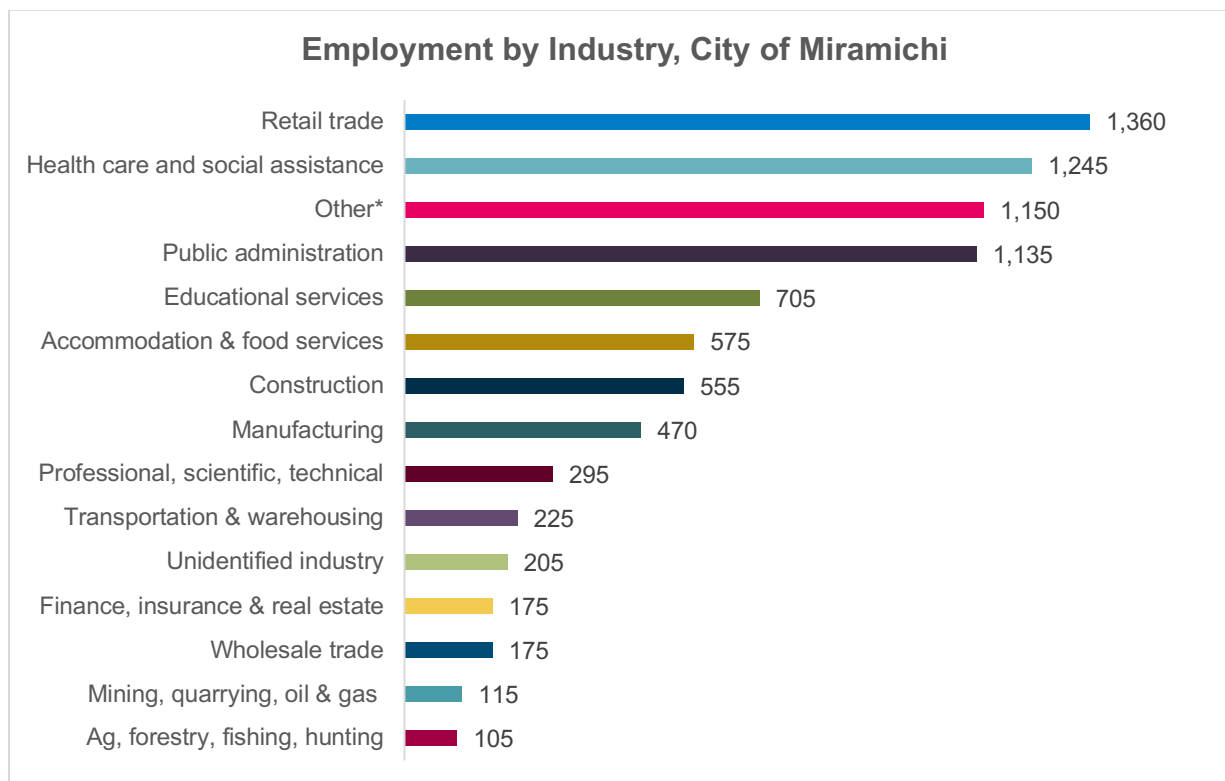
Table 13: Employment by Industry 1996 to 2016, City of Miramichi

	<b>1996</b>	<b>2016</b>	<b># Change</b>	<b>% Change</b>
<b>Total workforce</b>	9,460	8,490	-970	-10%
<b>Unidentified industry</b>	405	205	-200	-49%
<b>Agriculture; forestry; fishing and hunting</b>	170	105	-65	-38%
<b>Mining; quarrying; and oil and gas extraction</b>	180	115	-65	-36%
<b>Construction</b>	520	555	35	+7%
<b>Manufacturing</b>	1,330	470	-860	-65%
<b>Wholesale trade</b>	240	175	-65	-27%
<b>Retail trade</b>	1,475	1,360	-115	-8%
<b>Transportation and warehousing</b>	260	225	-35	-13%
<b>Finance, insurance and real estate</b>	230	175	-55	-24%
<b>Professional; scientific and technical services</b>	305	295	-10	-3%
<b>Educational services</b>	790	705	-85	-11%
<b>Health care and social assistance</b>	1,205	1,245	40	+3%
<b>Accommodation and food services</b>	600	575	-25	-4%
<b>Public administration</b>	890	1,135	245	+28%
<b>Other (incl. personal services, administrative, arts and communications)</b>	865	1,150	285	+33%

Source: Statistics Canada. Table 14-10-0098-01.



**Figure 19: Employment by Industry 2016, City of Miramichi**

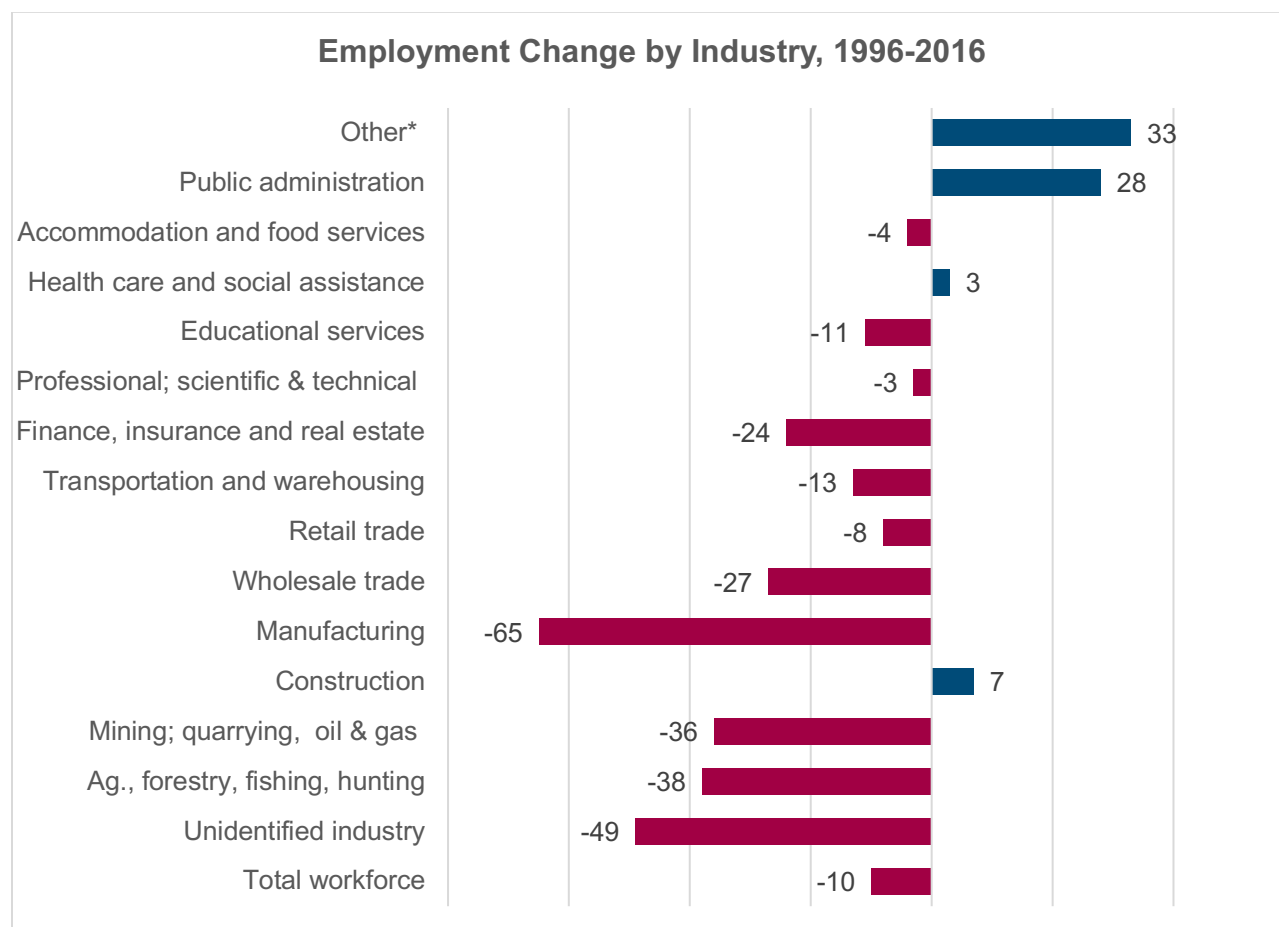


\* Includes personal services, administrative, arts and communications

Source: Adapted by Mellor Murray Consulting from Statistics Canada. Table 14-10-0098-01.



**Figure 20: Employment Change 1996 to 2016 (%), City of Miramichi**



\* Includes personal services, administrative, arts and communications

Source: Adapted by Mellor Murray Consulting from Statistics Canada. Table 14-10-0098-01.

Figure 21 shows selected industries and their Location Quotient (LQ) value for Miramichi. The LQ value shows the relative intensity of employment by industry compared to the national workforce. The LQ analysis shows us that the Miramichi economy is still heavily dependent on natural resources but it has become more reliant on the public sector in recent years. For example, Miramichi has an LQ value of 3.62 in industry group NAICS 114 Fishing, hunting and trapping which means that the community has 3.6 times as many employed in this sector compared to Canada overall. As the chart shows, Miramichi has well above average employment in federal government jobs, provincial public administration, and health care as well as nursing and residential care facilities.

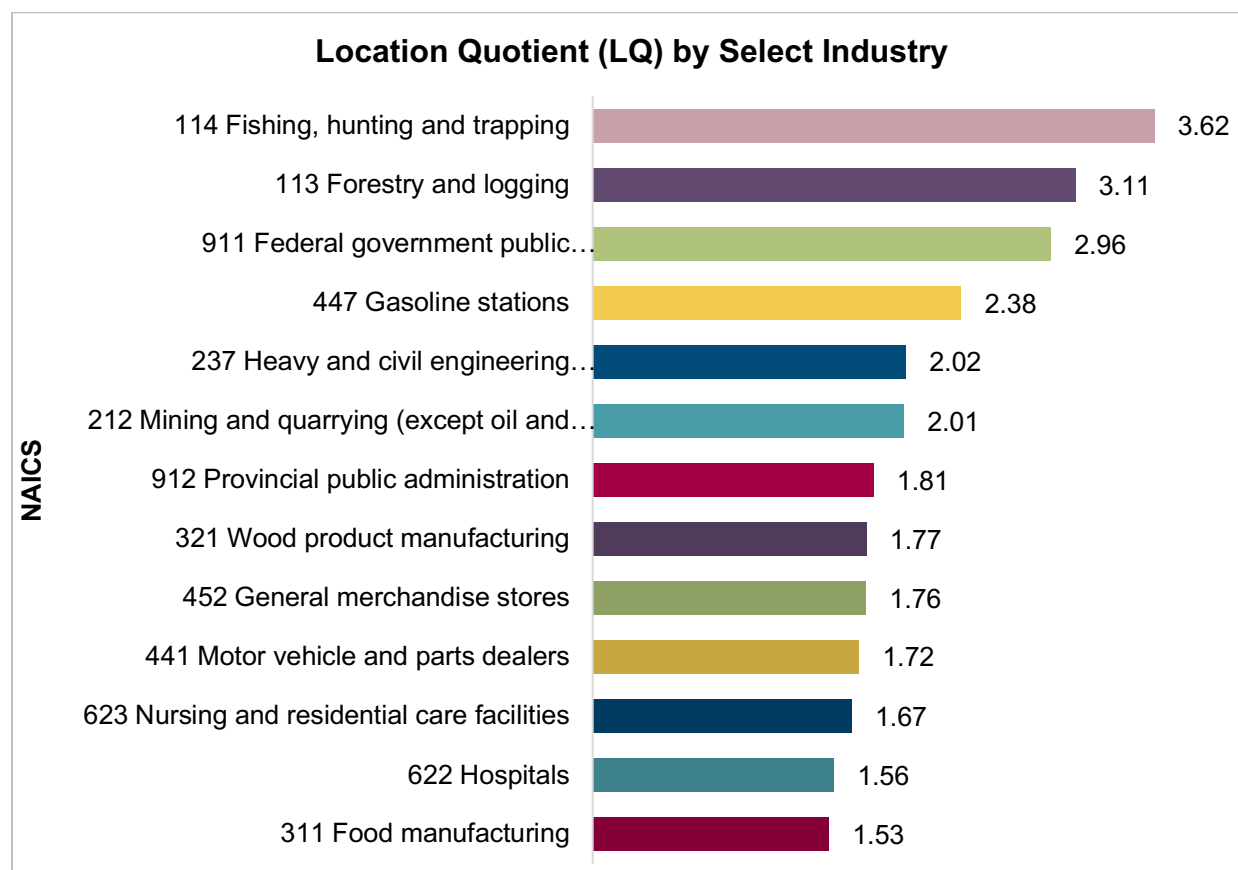
The LQ analysis can also be used to indicate sectors where Miramichi has well below average employment. The community's LQ value was only 0.33 for Finance and insurance (NAICS<sup>9</sup> 52) and only 0.49 for Professional, scientific and technical services (NAICS 54). These low concentrations could mean this industry activity is leaving the community and there could be an opportunity to

<sup>9</sup> North American Industry Classification or NAICS



capture this industry leakage to other urban centres. Another industry with low LQ is Arts, entertainment and recreation (NAICS 71) with an LQ of only 0.51.

**Figure 21: Location Quotient values for selected industries, Miramichi CA (2016), Canada = 1.00**



**NAICS (North American Industry Classification System (NAICS))**

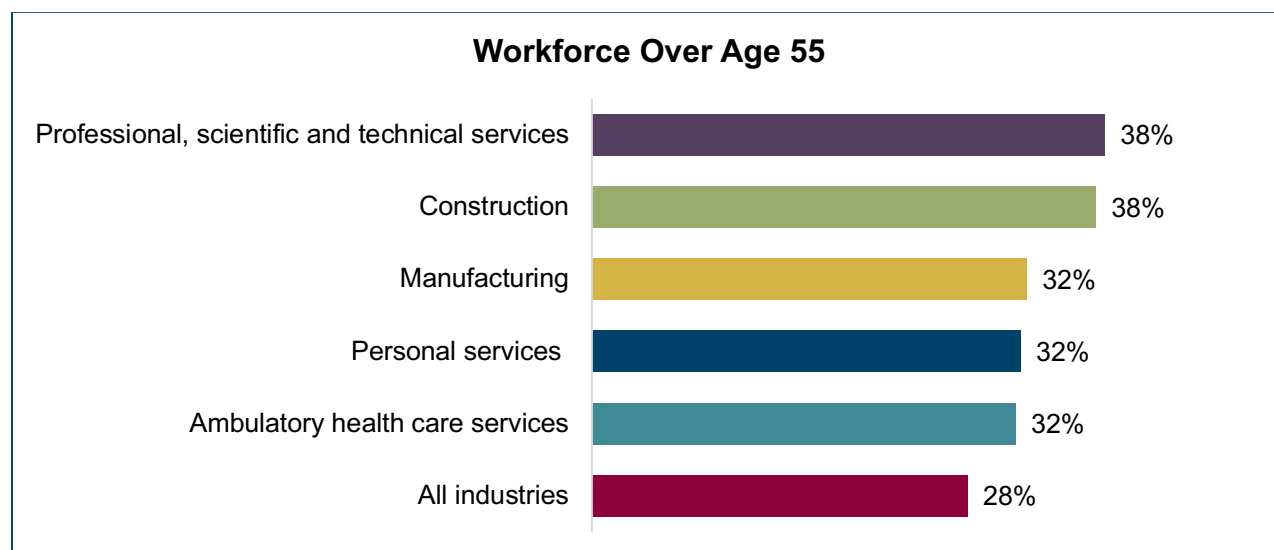
**Source: Statistics Canada 2016 Census**

### **The Looming Retirement Challenge**

There were nearly 4,100 people over the age of 55 active in the Miramichi workforce in 2016 even as the number of young people coming out of the school system has been in decline. As shown in Figure 22, 28 percent of all workers were over the age of 55 and in sectors such as construction the rate is nearly 40 percent. The gap between those exiting the workforce and those entering the workforce could be a serious challenge to the economy moving forward.



Figure 22: Share of the Workforce Over the Age of 55, Miramichi CA (2016)



Source: Statistics Canada 2016 Census

## Job Vacancies

Statistics Canada's quarterly Job Vacancy Survey is another sign of the growing difficulties in recruiting staff in New Brunswick. Table 14 shows the number of job vacancies<sup>10</sup> across New Brunswick has risen by 33 percent in the past four years. The survey identified 1,455 job vacancies in the Miramichi-Campbellton region in 2019, up from 1,095 in 2016.

Table 14: Total Job Vacancies in the Third Quarter Each Year, by Economic Region

Region:	Q3 2016	Q3 2017	Q3 2018	Q3 2019	100 Year change
New Brunswick	6,945	7,640	9,775	10,315	49%
Campbellton-Miramichi	1,095	1,090	1,515	1,455	33%
Moncton-Richibucto	2,495	2,750	3,830	4,050	62%
Saint John-St. Stephen	1,820	1,775	2,175	2,115	16%
Fredericton-Oromocto	915	1,145	1,340	1,720	88%
Edmundston-Woodstock	620	875	910	970	56%

Source: Statistics Canada. Table 14-10-0356-01.

<sup>10</sup> Job vacancies in the third quarter of 2016 through 2019



Vicinity Jobs tracks job advertisements by community across Canada using all major job advertisement websites (Indeed, etc.) as well as the job sections of major company websites. The job advertisements are classified by industry, occupation, wage level and other factors. Table 15 shows a comparison of job advertisements in the City of Miramichi in 2019 compared to 2018 by broad occupational group.

There was a slight decline in job advertisements between 2018 and 2019 with particular declines in Business, finance and administration occupations as well as Occupations in education, law and social, community and government services. Health-related job advertisements rose strongly in 2019.

**Table 15: Number of job advertisements by year, Miramichi**

<b>Occupation:</b>	<b>2018</b>	<b>2019</b>	<b>% change</b>	<b># change</b>
0 – Management occupations	134	133	-1%	-1
1 – Business, finance and administration occupations	162	126	-22%	-36
2 – Natural and applied sciences and related occupations	28	11	-61%	-17
3 – Health occupations	250	305	+22%	+55
4 – Occupations in education, law and social, community and government services	103	68	-34%	-35
5 – Occupations in art, culture, recreation and sport	11	14	+27%	+3
6 – Sales and service occupations	679	674	-1%	-5
7 – Trades, transport and equipment operators and related occupations	140	129	-8%	-11
8 – Natural resources, agriculture and related production occupations	5	3	-40%	-2
9 – Occupations in manufacturing and utilities	14	12	-14%	-2
Other / Unidentified	122	98	-20%	-24
<b>Total</b>	<b>1,648</b>	<b>1,573</b>	<b>-5%</b>	<b>-75</b>

**Source: Vicinity Jobs.**

Vicinity also provides data for detailed occupations. Table 16 shows the top occupations by number of job advertisements in 2019 compared to 2018. The highest number of job advertisements were for Professional occupations in nursing followed by Retail salespersons and Customer and information services representatives. There has been a significant increase in Nursing job advertisements as those for Insurance, real estate and financial sales occupations.





**Table 16: Total job vacancies in the third quarter each year, by economic region**

<b>Occupation:</b>	<b>2018</b>	<b>2019</b>	<b># change</b>
301 Professional occupations in nursing	99	133	<b>+34</b>
642 Retail salespersons	106	116	<b>+10</b>
655 Customer and information services representatives	109	78	-31
632 Chefs and cooks	75	64	-11
623 Insurance, real estate and financial sales occupations	29	59	<b>+30</b>
751 Motor vehicle and transit drivers	71	44	-27
141 General office workers	27	44	<b>+17</b>
062 Retail and wholesale trade managers	46	41	-5
323 Other technical occupations in health care	49	40	-9
641 Sales and account reps. – wholesale trade (non-technical)	48	39	-9
661 Cashiers	27	32	<b>+5</b>
321 Medical technologists and technicians (except dental health)	26	31	<b>+5</b>
622 Technical sales specialists in wholesale trade and retail	33	30	-3
662 Other sales support and related occupations	35	28	-7
671 Food counter attendants, kitchen helpers and related occupations	19	25	<b>+6</b>
673 Cleaners	41	24	-17
415 Social and community service professionals	31	22	-9
732 Automotive service technicians	21	22	<b>+1</b>
654 Security guards and related security service occupations	19	20	<b>+1</b>

**Source: Vicinity Jobs.**

### 3.8 Housing trends

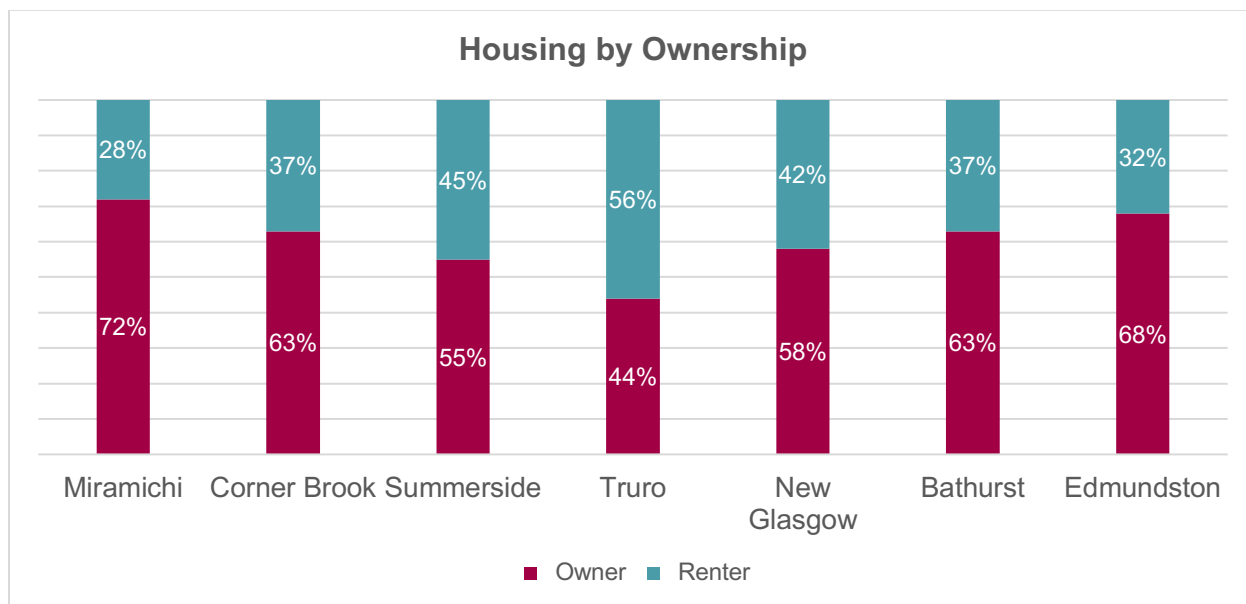
An adequate supply of housing for rent and purchase is an important factor in population growth. Housing availability has the potential to become a significant barrier to growth in the Miramichi. Housing starts and apartment vacancy rates are very low relative to most of the City's peer communities. This section of the report provides a summary of the housing environment in Miramichi.

#### Ownership and period of construction

Seventy-two percent of houses in the City of Miramichi are owned while 28 percent are rented. Miramichi has the highest rate of home ownership among the seven cities, by a fairly wide margin.



**Figure 23: Breakdown of housing by ownership, 2016 (% of total)**



**Source: Mellor Murray Consulting adapted from Statistics Canada 2016 Census**

Table 18 shows the breakdown of housing by period of construction in Miramichi and the other benchmark cities. Only 11 percent of all housing units in the City were built between 2001 and 2016; below average when compared to the other cities.

This analysis of the age of housing is a proxy for periods of growth in the communities. Fifteen percent of all housing in Miramichi was built between 1981 and 1990; the highest share among the seven comparator jurisdictions (tied with Edmundston). In New Glasgow, nearly half of the housing stock was built before 1960.



Table 17: Breakdown of housing by period of construction, 2016 (% of total)

<i>Age of housing:</i>	<i>Miramichi</i>	<i>Corner Brook</i>	<i>Summerside</i>	<i>Truro</i>	<i>New Glasgow</i>	<i>Bathurst</i>	<i>Edmundston</i>
<b>1960 or before</b>	31%	33%	29%	43%	46%	28%	33%
<b>1961 to 1980</b>	33%	35%	29%	26%	23%	42%	32%
<b>1981 to 1990</b>	15%	11%	12%	9%	11%	11%	15%
<b>1991 to 2000</b>	11%	9%	12%	8%	9%	9%	12%
<b>2001 to 2005</b>	4%	3%	5%	4%	3%	3%	4%
<b>2006 to 2010</b>	3%	4%	6%	7%	4%	3%	4%
<b>2011 to 2016</b>	4%	4%	6%	4%	5%	3%	2%

Source: Statistics Canada 2016 Census.

### Housing costs

On average, housing costs in Miramichi are below average compared to the other small cities shown in Table 19. The average dwelling was valued at \$151,676<sup>11</sup>, less than four of the six other communities. The average monthly cost of shelter (including mortgage payments, property taxes and insurance, etc.) for owned dwellings was \$850. Housing costs in Miramichi were lower than all but Bathurst among the seven communities.

Only 10.6 percent of owner households in Miramichi spent 30 percent or more of household income on shelter costs at the time of the Census. This was the lowest share of income allocated to shelter among the seven compared cities.

For rental properties the average monthly shelter costs in Miramichi was \$698/month, higher than Bathurst and Edmundston but lower than the other four cities. The share of renters (tenant) households spending 30 percent of their income or more on housing was higher than Corner Brook, Summerside and Edmundston but lower than the other jurisdictions.

<sup>11</sup> 2016 Census



Table 18: Breakdown of housing/shelter by cost, 2016

	Miramichi	Corner Brook	Summerside	Truro	New Glasgow	Bathurst	Edmundston
<i>Median monthly shelter costs owned dwellings (\$)</i>	<b>\$695</b>	\$840	\$856	\$863	\$852	\$654	\$765
<i>Average monthly shelter costs owned dwellings (\$)</i>	<b>\$850</b>	\$1,033	\$957	\$955	\$959	\$813	\$882
<i>Median value dwellings (\$)</i>	<b>\$139,292</b>	\$219,551	\$149,581	\$160,189	\$149,563	\$114,707	\$127,030
<i>Average value dwellings (\$)</i>	<b>\$151,676</b>	\$232,093	\$156,909	\$179,668	\$173,136	\$136,990	\$146,321
<i>% of owner households spending &gt;30% of income on shelter</i>	<b>10.6</b>	11.4	12.6	12.8	11.3	10.8	12.5
<i>Median monthly shelter costs rented dwellings (\$)</i>	<b>\$684</b>	\$763	\$766	\$729	\$701	\$574	\$591
<i>Average monthly shelter costs rented dwellings (\$)</i>	<b>\$698</b>	\$792	\$797	\$777	\$746	\$645	\$608
<i>% of tenant households spending &gt;30% of income on shelter</i>	<b>37.6</b>	37.2	35.3	48.4	46.2	42.7	37.5

Source: Statistics Canada 2016 Census.

## Construction trends

Housing starts trends for the Miramichi Census Agglomeration area are shown in Table 20 using Canada Mortgage and Housing Corporation (CMHC) data reported by Statistics Canada. Between 2014 and 2018 there were an average of 59 units built per year but the in recent years the numbers have been declining. There was an average of 75 units built per year between 2012 and 2015 while only an average of 45 per year since. In the first two quarters of 2019, there were only five housing starts according to CMHC. Seventy-five percent of the units built in the past eight years have been single detached houses.



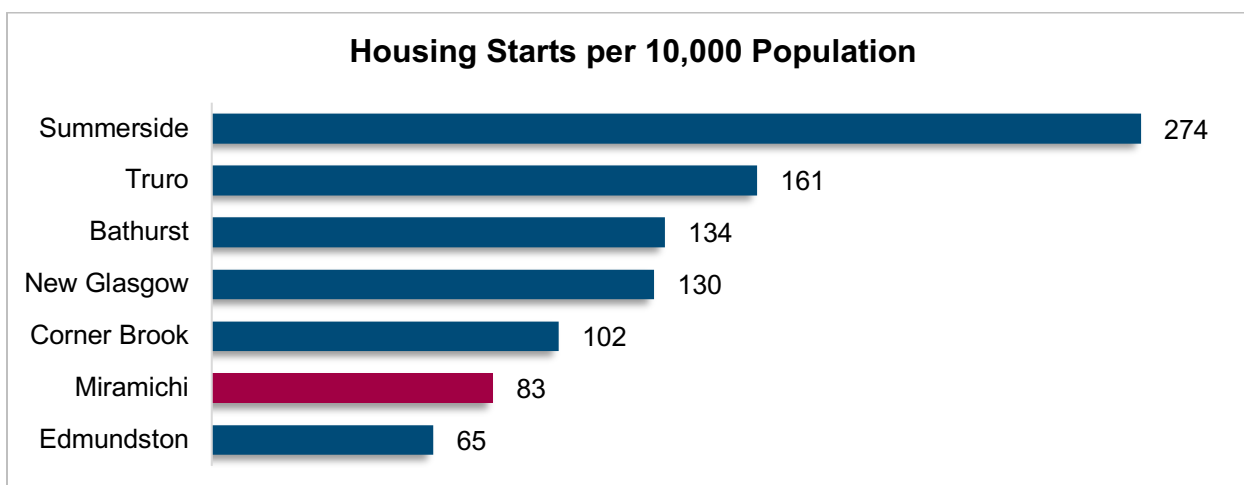
**Table 19: Housing starts by type and year, Miramichi CA**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Total units</b>	<b>55</b>	<b>41</b>	<b>87</b>	<b>71</b>	<b>91</b>	<b>69</b>	<b>24</b>	<b>56</b>	<b>54</b>	<b>29</b>
Single-detached units	55	41	59	46	61	43	24	42	54	29
Semi-detached units	0	0	4	2	2	2	0	0	0	0
Row units	0	0	0	0	0	0	0	0	0	0
Apartment and other units	0	0	24	23	28	24	0	14	0	0

**Source: Statistics Canada Table: 34-10-0138-01.**

A comparison of housing starts trends is shown in Figures 24 and 25 below. Miramichi has had the second lowest housing starts in the past five years (2015 to 2019 combined) when adjusted for population size. It also had the fewest apartment units built in the seven communities.

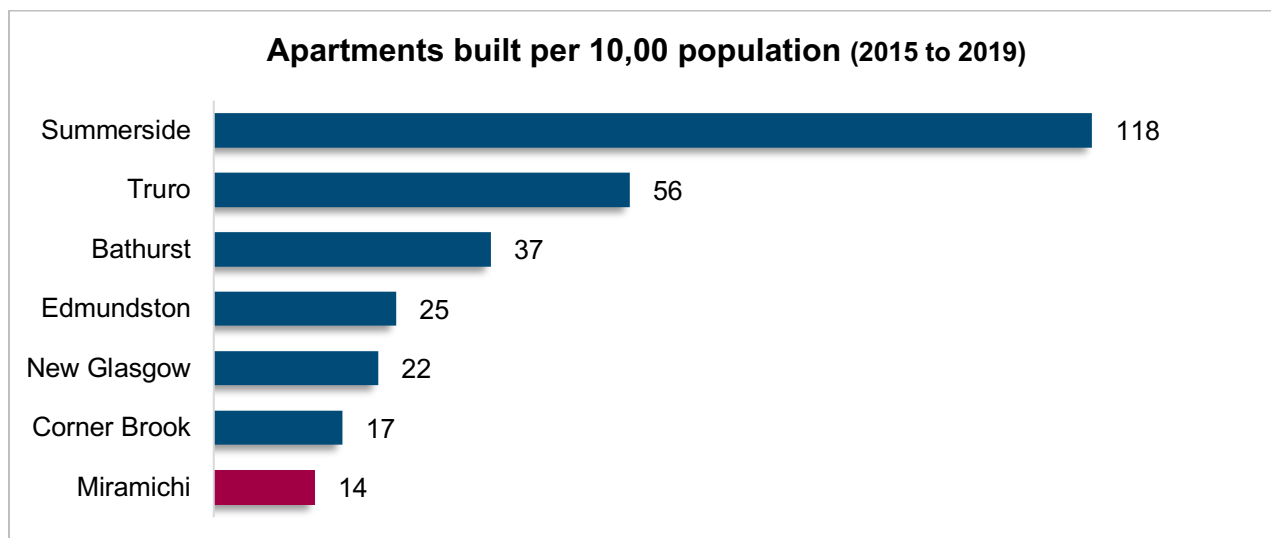
**Figure 24: Housing starts per 10,000 population (cumulative 2015-2019), Miramichi CA and benchmarks**



**Source: Statistics Canada Table: 34-10-0138-01.**



**Figure 25: Apartment units built per 10,000 population (cumulative 2015-2019), Miramichi CA and benchmarks**



Source: Statistics Canada Table: 34-10-0138-01.

### 3.9 Household spending activity

The following table provides a summary of the market size for household spending in the City of Miramichi and in the wider Census Agglomeration area. The data was developed by Sitewise using Statistics Canada's annual household spending survey. This data is based on the spending of residents and does not include tourists or business spending.

Current consumption (spending on current goods and services) represents nearly three quarters of all household spending (74% in the CA and 75% in the City). Income tax, personal insurance, savings and other non-current consumption make up the rest of the spending. Within current consumption, the bulk is spent on shelter, food and transportation.



**Table 20: 2019 Household Spend Summary, Miramichi**

	Miramichi CA			Miramichi (City)		
	Total Expenditure	Expenditure per Household	%	Total Expenditure	Expenditure per Household	%
<b>Spending category:</b>	<b>\$1,021,813,534</b>	<b>\$85,137</b>		<b>\$654,948,119</b>	<b>\$83,968</b>	
Total current consumption & financial transfers	\$972,311,359	\$81,012	95%	\$628,122,634	\$80,529	96%
Total current consumption	\$757,022,721	\$63,075	74%	\$488,130,958	\$62,581	75%
Shelter	\$135,994,333	\$11,331	13%	\$92,600,900	\$11,872	14%
Food	\$125,020,640	\$10,417	12%	\$79,712,862	\$10,220	12%
Household operation	\$54,520,453	\$4,543	5%	\$34,580,356	\$4,433	5%
Health care	\$47,870,428	\$3,989	5%	\$30,853,764	\$3,956	5%
Household furnishings and equipment	\$33,862,296	\$2,821	3%	\$21,685,290	\$2,780	3%
Transportation	\$180,193,287	\$15,014	18%	\$111,407,988	\$14,283	17%
Recreation	\$49,000,807	\$4,083	5%	\$32,129,023	\$4,119	5%
Personal care	\$18,446,919	\$1,537	2%	\$12,182,417	\$1,562	2%
Clothing	\$37,483,999	\$3,123	4%	\$24,528,961	\$3,145	4%
Education	\$8,431,544	\$703	1%	\$5,691,827	\$730	1%
Reading materials & related	\$1,825,237	\$152	0%	\$1,211,380	\$155	0%
Tobacco products and alcoholic beverages	\$35,471,869	\$2,955	3%	\$22,693,254	\$2,909	3%
Games of chance	\$12,339,292	\$1,028	1%	\$7,858,169	\$1,007	1%
Miscellaneous expenditures	\$16,561,617	\$1,380	2%	\$10,994,767	\$1,410	2%
Income tax	\$134,861,462	\$11,237	13%	\$87,359,137	\$11,200	13%
Total personal insurance premiums and retirement/pension contributions	\$55,435,632	\$4,619	5%	\$35,986,545	\$4,614	5%
Total money gifts, contributions and support payments	\$24,991,543	\$2,082	2%	\$16,645,994	\$2,134	3%

**Source: CBRE/Sitewise, February 2020**



**Table 20 (Continued): 2019 Household Spend Summary, Miramichi**

	Miramichi CA			Miramichi (City)		
	Total Expenditure	Expenditure per Household	%	Total Expenditure	Expenditure per Household	%
Total non-current consumption	\$49,502,176	\$4,124	5%	\$26,825,485	\$3,439	4%
Improvements and alterations to owned principal residence	\$30,092,589	\$2,507	3%	\$18,570,914	\$2,381	3%
Improvements and alterations to vacation homes	\$2,821,421	\$235	0%	\$1,866,949	\$239	0%
Net purchase price of owned residences	\$7,097,963	\$591	1%	\$261,542	\$34	0%
Net purchase price of owned secondary residences	\$4,717,931	\$393	0%	\$3,055,200	\$392	0%
Net purchase price of other owned properties	\$4,772,271	\$398	0%	\$3,070,880	\$394	0%

Source: CBRE/Sitewise, February 2020.

**Table 21: Total Household Expenditure by Origin, 2019**

	Miramichi CA	Miramichi (City)		Miramichi CA	Miramichi (City)	
	Total Expenditure	Expenditure per Household	%	Total Expenditure	Expenditure per Household	%
<b>Total Household Expenditure</b>	<b>\$1,021,813,534</b>	<b>\$85,137</b>		<b>\$654,948,119</b>	<b>\$83,968</b>	
Goods and services purchased outside Canada	\$1,075,795	\$90	0%	\$712,671	\$91	0%
Goods and services bought through direct sales over the internet	\$7,902,969	\$658	1%	\$5,149,537	\$660	1%
Goods and services bought through other types of direct sales	\$1,366,848	\$114	0%	\$806,994	\$103	0%
Other	\$1,011,467,922	\$84,275	99%	\$648,278,917	\$83,113	99%

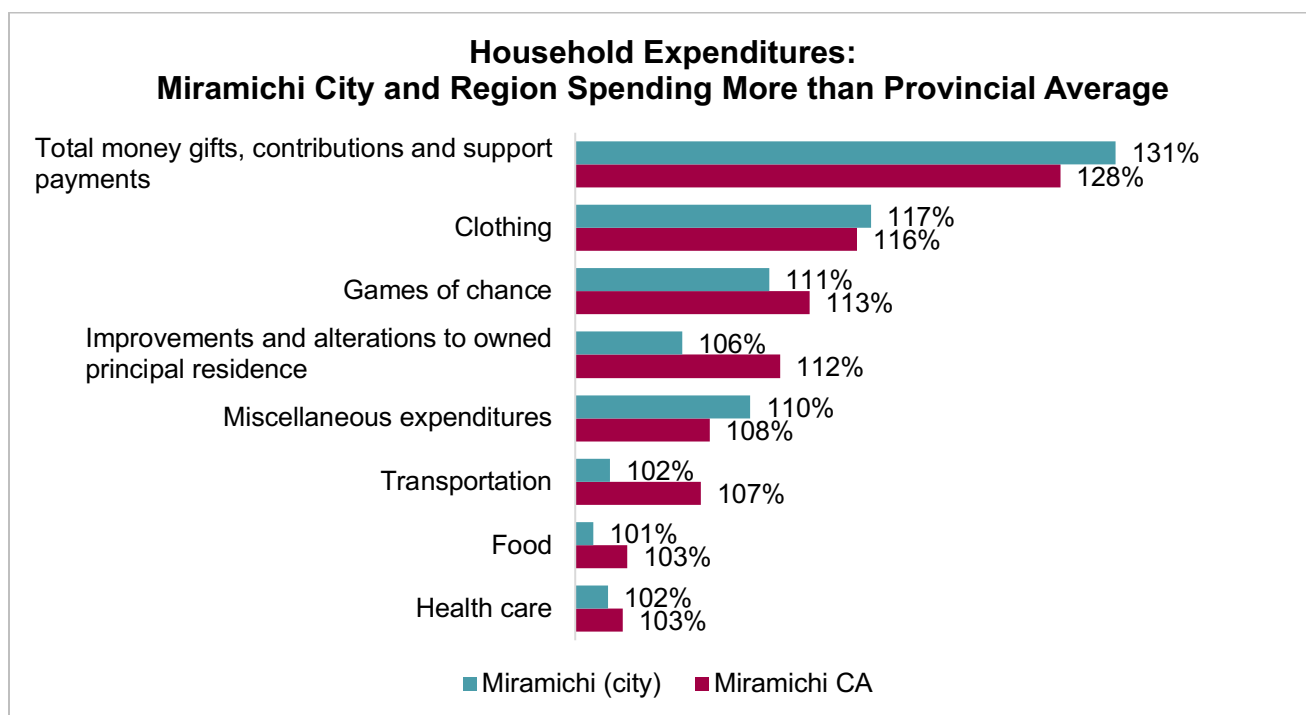
Source: CBRE/Sitewise, February 2020.

Figure x compares household spending in the Miramichi CA and the City of Miramichi to the average household across the province. In general, residents of the Miramichi spend a much higher share of their total household income on gifts, contributions and support payments (\$2,134 in the city compared to \$1,628 across the province). Other expenditure areas where residents in Miramichi (City and urban region) spend considerably more are clothing, games of change and improvements to their residence.





**Figure 26: Expenditure categories for which Miramichi households spend more than the provincial average (New Brunswick -= 100%)**

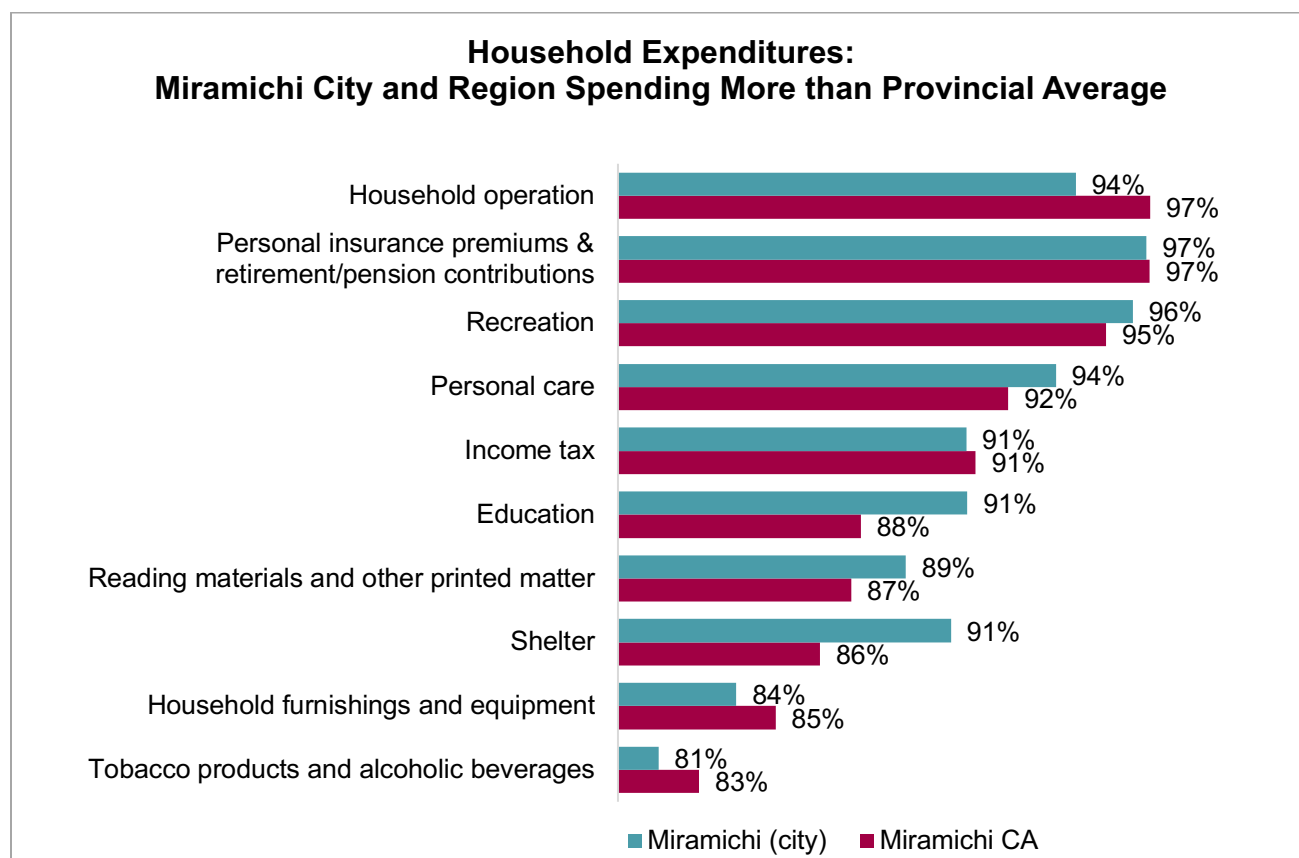


**Source: CBRE/Sitewise, February 2020**

Figure 27 shows expenditure categories where the average household in Miramichi (City and urban region) spend considerably less than the average household across the province. Tobacco products and alcoholic beverages, household furnishings and equipment, shelter as well as reading materials and other printed matter are all expenditure categories where the average household in Miramichi (City and urban region) spend considerably less.



**Figure 27: Expenditure categories for which Miramichi households spend LESS than the provincial average (New Brunswick = 100%)**



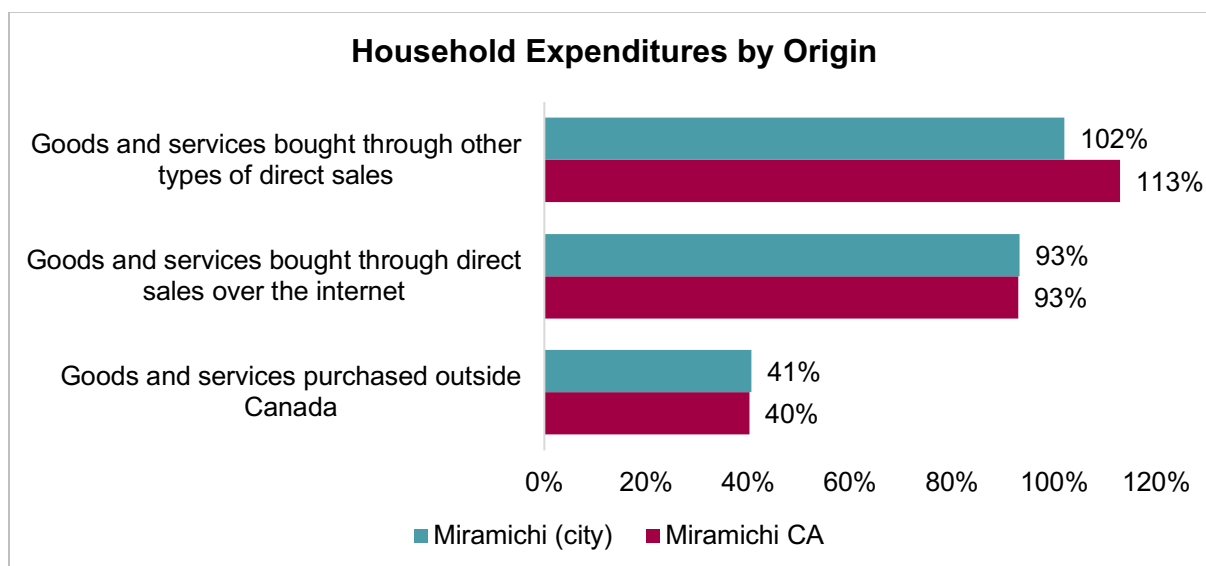
**Source: CBRE/Sitewise, February 22020**

The vast majority of household expenditures are purchased by sourcing in the community (excluding direct sales) (Figure 27 above). Figure 28 shows the difference between the average household's expenditures in the Miramichi CA and the city compared to the average household across the province. Households in Miramichi (city and region) spend more of their income through other types of direct sales (excluding the Internet) and spend slightly less on sales through the Internet (however this channel still only represents less than one percent of total household consumption as of 2019).

The average household in the City of Miramichi only spent an estimated \$90 on goods outside Canada compared to \$224 for the average household across New Brunswick.



**Figure 28: Comparison of household expenditures by origin (New Brunswick = 100%)**



**Source: CBRE/Sitewise, February 2020**

### 3.10 Business Count Analysis

Statistics Canada reports twice yearly on the number of businesses in the community by industry code and by employment size. The report tracks individual business locations. A single firm could have more than one location in the community (e.g. a bank might have multiple branches and each branch is reported as a single location). The data is provided for both the private and public sectors and includes all business locations within the City.

Table 21 shows the number of businesses in the City of Miramichi that reported having at least some formal employment as of June 2019. There were 767 business locations, up a modest two percent from the same month in 2014. There has been a decline in the number of micro-businesses (with fewer than five employees) but solid growth in businesses with between 20 to 49 employees. The number of large business locations (with more than 200 workers) remained constant at five businesses.



**Table 22: Business Counts in the City of Miramichi, All sectors by Employment Size**

<b>Size:</b>	<b>2014</b>	<b>2019</b>	<b>% Change</b>
<b>Total, with employees</b>	752	767	2%
1-4	374	356	-5%
5-9	165	181	10%
10-19	118	119	1%
20-49	61	77	26%
50-99	15	16	7%
100-199	14	13	-7%
200-499*	4	4	0%
500 +**	1	1	0%

\*The five businesses with between 200 and 499 employees in 2019 were: Local government, a data processing centre, a retail establishment, a fabricated metal manufacturer and a construction firm.

\*\*The one business with over 500 employees was the hospital.

Source: Canadian Business Patterns, Statistics Canada (June counts). Includes the public sector.

### Tourism-related businesses

Hotel/motel room sales are one measure of tourism activity in the community. Over the past 5 years (2015-2019), the Miramichi accommodation sector saw demand grow at a CAGR<sup>12</sup> of 3.5% as Leisure travel increased and general improvements in economic conditions induced additional business travel, with no increases in rooms supply. Market occupancy in the Miramichi accommodation market has fluctuated from the mid 40% to the low 50% range, despite limited economic growth. Miramichi's accommodation market performance is discussed further in Section 3.11.

The business count data shown in Table 22, indicates there the number of accommodations providers decreased between 2014 and 2019. Over the same period, there was a net increase of nine restaurants in the City.

Other tourism-related businesses In Miramichi four historic and heritage sites, one golf course and two marinas.

<sup>12</sup> Compound annual growth rate (CAGR)

**Table 23: Tourism-related business counts, Miramichi CA**

<b>Industry:</b>	<b>2014</b>	<b>2019</b>	<b># change</b>
Hotels and motels	8	6	-2
Other accommodation	4	3	-1
Restaurants	43	52	9
Theatres, dance and other performing arts	0	0	0
Museums and art galleries	0	0	0
Historic and heritage sites	2	4	2
Zoos and botanical gardens	0	0	0
Golf courses and country clubs	1	1	0
Marinas	2	2	0
<b>Totals</b>	<b>60</b>	<b>68</b>	<b>8</b>

Source: Canadian Business Patterns, Statistics Canada (June 2014, 2019).

### Manufacturing firms

The manufacturing sector continues to be an important industry, employing approximately 500 people who live in the Miramichi CA and over 5,000 across the Miramichi-Campbellton region. Table 23 shows manufacturing firms by employment level in 2019 compared to 2014. There was no net change in the number of manufacturing firms but the employment levels have changed. There was a decline in the number of manufacturers with 10 to 100 employees but an increase of three firms with 100 or more employees over the five years.

**Table 24: Manufacturing business counts, Miramichi CA**

<b>Industry:</b>	<b>2014</b>	<b>2019</b>	<b># Change</b>
<b>Total, with employees</b>	<b>24</b>	<b>24</b>	<b>0</b>
1-4	9	9	0
5-9	4	7	3
10-19	7	1	-6
20-49	0	1	1
50-99	2	1	-1
100-199	2	4	2
200-499	0	1	1
500 +	0	0	0

Source: Canadian Business Patterns, Statistics Canada (June counts).

Table 24 shows a detailed breakdown of manufacturing firms by sub-sector in 2019. There were four fewer manufacturing firms in 2019 compared to 2014 with a net three firms lost in printing-related sectors. There was one fewer bakery in 2019 compared to 2014, one less machine shop and one



less sign manufacturer. In 2019 there was one more manufacturing in each of these sub-sectors: clothing accessories manufacturing, other plate work/fabricated structural products, and all other miscellaneous fabricated metal products.

**Table 25: Manufacturing business counts, Miramichi CA**

**Firms by employment level (2019):**

Manufacturing sub-sector	2014	2019	1-4	5-9	10-19	20-49	50-99	100+
<b>311119 – Other animal food manufacturing</b>	1	1	0	1	0	0	0	0
<b>311511 – Fluid milk manufacturing</b>	1	1	0	0	0	0	0	1
<b>311811 – Retail bakeries</b>	3	2	1	0	1	0	0	0
<b>313310 – Textile and fabric finishing</b>	1	1	1	0	0	0	0	0
<b>315210 – Cut and sew clothing contracting</b>	1	1	1	0	0	0	0	0
<b>315990 – Clothing accessories</b>	0	1	1	0	0	0	0	0
<b>321211 – Hardwood veneer and plywood mills</b>	1	1	1	0	0	0	0	0
<b>321215 – Structural wood product manufacturing</b>	1	1	0	1	0	0	0	0
<b>321217 – Waferboard mills</b>	1	1	0	0	0	0	0	1
<b>323119 – Other printing</b>	1	1	0	1	0	0	0	0
<b>325314 – Mixed fertilizer manufacturing</b>	1	1	0	0	0	0	1	0
<b>327320 – Ready-mix concrete manufacturing</b>	1	1	0	1	0	0	0	0
<b>332319 – Other plate work/fabricated structural</b>	1	2	0	0	0	0	0	2
<b>332710 – Machine shops</b>	1	0	0	0	0	0	0	0
<b>332999 – All other misc. fabricated metal</b>	1	2	2	0	0	0	0	0
<b>333990 – All other general-purpose machinery</b>	1	1	0	0	0	1	0	0
<b>334512 – Measuring, medical &amp; control devices</b>	1	1	0	1	0	0	0	0
<b>336990 – Other transportation equipment</b>	1	1	0	0	0	0	0	1
<b>337110 – Wood kitchen cabinet and counter tops</b>	1	1	0	1	0	0	0	0
<b>339950 – Sign manufacturing</b>	4	3	2	1	0	0	0	0

Source: Canadian Business Patterns, Statistics Canada (June counts).



## Transportation sector

Employment in the transportation sector in Miramichi has decreased in recent years coinciding with the loss of manufacturing jobs in the City. There has been a slight increase in the number of firms in the transportation sector between 2014 and 2019 (Table 25). This includes more taxi services, one more courier company and one more in trucking.

**Table 26: Transportation business counts, Miramichi CA**

**Firms by employment level (2019):**

Transportation sub-sector:	2014	2019	1-4	5-9	10-19	20-49	50-99	100+
<b>4821 – Rail transportation</b>	1	1	0	0	0	0	1	0
<b>4841 – General freight trucking</b>	8	7	5	0	0	2	0	0
<b>4842 – Specialized freight trucking</b>	6	8	5	0	2	1	0	0
<b>4851 – Urban transit systems</b>	1	1	0	0	1	0	0	0
<b>4853 – Taxi and limousine service</b>	1	3	1	2	0	0	0	0
<b>4872 – Scenic and sightseeing transportation, water</b>		1	1	0	0	0	0	0
<b>4881 – Support activities for air transportation</b>	1	1	0	1	0	0	0	0
<b>4884 – Support activities for road transportation</b>	3	3	1	1	0	0	1	0
<b>4885 – Freight transportation arrangement</b>	1	1	0	0	1	0	0	0
<b>4889 – Other support activities for transportation</b>	1	1	1	0	0	0	0	0
<b>4911 – Postal service</b>	1	1	0	1	0	0	0	0
<b>4921 – Couriers</b>	2	3	2	1	0	0	0	0
<b>4922 – Local messengers and local delivery</b>	2	2	1	1	0	0	0	0
<b>4931 – Warehousing and storage</b>	0	0	0	0	0	0	0	0

Source: Canadian Business Patterns, Statistics Canada (June counts).



### Professional services firms

As noted earlier, the Miramichi CA has a small professional services industry relative to the national economy. The City itself has 40 professional services-related firms down slightly from 43 in 2014 (Table 26). There are five less legal services firms, four less architectural, engineering and related firms, three more IT services firms and two more consulting firms in 2019.

**Table 27: Professional services business counts, Miramichi CA**

<b>Industry:</b>	<b>2014</b>	<b>2019</b>	<b># change</b>
Legal services	12	7	-5
Accounting and bookkeeping	7	7	0
Architectural, engineering and related	11	7	-4
IT services	2	5	+3
Consulting services	2	4	+2
Other	9	10	+1
<b>Totals</b>	<b>43</b>	<b>40</b>	<b>-3</b>

**Source: Canadian Business Patterns, Statistics Canada (June counts).**

### Construction sector

There were 71 construction firms in 2019 with employment up by eight firms since 2014 as shown in Table 27. The biggest increases were firms in residential building construction (up by five), industrial building and structure construction and land subdivision (Table 27). The most notable change was in the industrial building and structure construction sector which had zero companies in 2014 and in 2019 there was one firm with over 200.





**Table 28: Construction-related business counts, Miramichi CA**

Construction sub-sector	Year		Firms by employment level (2019):						
	2014	2019	1-4	5-9	10-19	20-49	50-99	100-199	200+
236110 – Residential building construction	16	21	10	3	6	2	0	0	0
236210 – Industrial building and structure construction	0	2	1	0	0	0	0	0	1
236220 – Commercial and institutional building construction	2	3	1	0	1	1	0	0	0
237110 – Water and sewer line and related structures construction	1	1	1	0	0	0	0	0	0
237120 – Oil and gas pipeline and related structures construction	0	1	0	0	1	0	0	0	0
237130 – Power and communication line and related structures construction	0	1	0	0	1	0	0	0	0
237210 – Land subdivision	0	2	1	1	0	0	0	0	0
237310 – Highway, street and bridge construction	2	3	0	0	0	2	0	1	0
237990 – Other heavy and civil engineering construction	1	1	1	0	0	0	0	0	0
238110 – Poured concrete foundation and structure contractors	3	2	2	0	0	0	0	0	0
238160 – Roofing contractors	2	1	0	1	0	0	0	0	0
238170 – Siding contractors	2	3	3	0	0	0	0	0	0
238190 – Other foundation, structure and building exterior contractors	0	1	1	0	0	0	0	0	0
238210 – Electrical contractors and other wiring installation contractors	9	9	4	2	1	2	0	0	0
238220 – Plumbing, heating and air-conditioning contractors	6	5	4	0	1	0	0	0	0
238299 – All other building equipment contractors	1	1	0	0	0	1	0	0	0
238310 – Drywall and insulation contractors	2	1	0	1	0	0	0	0	0
238320 – Painting and wall covering contractors	3	3	2	1	0	0	0	0	0
238330 – Flooring contractors	1	1	1	0	0	0	0	0	0
238350 – Finish carpentry contractors	2	0	0	0	0	0	0	0	0
238390 – Other building finishing contractors	2	3	1	1	1	0	0	0	0
238910 – Site preparation contractors	2	1	0	0	0	1	0	0	0
238990 – All other specialty trade contractors	6	5	2	2	0	1	0	0	0

**Source: Canadian Business Patterns, Statistics Canada (December counts).**



### 3.11 Tourism Sector Overview

Tourism is an important generator of demand for Miramichi, and one that the City and Region are actively trying to grow. From a destination perspective, the Region of Miramichi is best known for its nature and outdoor experiences, featuring the Miramichi River, coastal beaches, forests and parks, as well as unique historic sites. The City of Miramichi is also actively looking to redevelop more urban experiences, in the historic downtown and waterfront areas of Chatham and Newcastle. As mentioned, there are some challenges to Miramichi's product and experience inventory, including strong seasonality (it is primarily a summer destination) and limited wayfinding.

In addition to the tourism marketing work undertaken at the regional level by the Miramichi River Tourism Association, the City collects data at the local Miramichi Visitor Information Centre (VIC), which provides a good cross-section of visitation to the area, particularly during the summer months. The City also collects postal code data from one of the major annual events, the Miramichi Striper Cup, which will be used to conduct a market segmentation analysis using PRIZM in conjunction with Environics Analytics. An evaluation of the VIC data is provided later in this section.

From an overall visitation and employment perspective, however, data is more limited. That being said, some strong indicators of overnight visitation are available through accommodation market performance data, which is tracked through CBRE Hotels on a monthly basis.

With this in mind, it is important to begin by considering available data at the provincial level. The following provides an overview of New Brunswick's tourism industry as projected by the Conference Board and Statistics Canada prior to the Covid-19 pandemic.

**Table 29 New Brunswick Provincial Travel Market Outlook 2019-2022**

PROVINCIAL TRAVEL MARKET OUTLOOK					
<b>New Brunswick</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
<b>Total ('000s overnight province visits)</b>	<b>3,168</b>	<b>3,212</b>	<b>3,254</b>	<b>3,295</b>	<b>3,339</b>
	1.5	1.4	1.3	1.3	1.3
<b>Domestic</b>	<b>2,774</b>	<b>2,807</b>	<b>2,837</b>	<b>2,868</b>	<b>2,899</b>
	1.7	1.2	1.1	1.1	1.1
<b>Business</b>	<b>205</b>	<b>210</b>	<b>214</b>	<b>217</b>	<b>220</b>
	1.7	2.1	1.9	1.5	1.7
<b>Pleasure</b>	<b>1,044</b>	<b>1,058</b>	<b>1,071</b>	<b>1,085</b>	<b>1,099</b>
	2.6	1.4	1.2	1.3	1.3
<b>United States</b>	<b>312</b>	<b>320</b>	<b>326</b>	<b>333</b>	<b>339</b>
	0.7	2.4	2.1	2.0	1.9
<b>Overseas</b>	<b>81</b>	<b>85</b>	<b>90</b>	<b>95</b>	<b>100</b>
	0.7	5.0	4.9	5.6	5.9
<b>Total Expenditures (\$ millions overnight)</b>	<b>1,178</b>	<b>1,219</b>	<b>1,264</b>	<b>1,310</b>	<b>1,361</b>
	4.8	3.5	3.7	3.7	3.9
<b>Travel Price Index</b>	<b>3.94</b>	<b>1.83</b>	<b>2.20</b>	<b>2.08</b>	<b>2.08</b>

Source: The Conference Board of Canada

As shown in Table 29, the most recent Conference Board of Canada Travel Market Outlooks for the 2019 to 2022 period were published in Winter 2019. The projections for New Brunswick are summarized below.



- New Brunswick hosted the 2018 World Under-17 Hockey Challenge, contributing to improved growth for overnight visits of 1.5%.
- Overnight visits to New Brunswick were poised for steady growth in 2019 and beyond, with tourism activity supported by gains in consumer spending and the weak exchange rate with nearby border location in New Brunswick.
- The significant strengthening of the US dollar in recent years has had a positive impact on domestic travel in Canada and New Brunswick. Canadians that would have travelled to the US for vacation are increasingly making plans to travel domestically.
- The provincial government had allocated \$12.6 million in tourism infrastructure in 2018-19, including parks, trails, historic sites, etc., as part of a multi-year improvement to the sector.

To gain a more current perspective, information on the historic performance of New Brunswick's accommodation market has been drawn from data collected through the CBRE Hotels Trends database<sup>13</sup>.

The following data has been compiled and published by CBRE for the New Brunswick accommodation market. While the provincial market performance does not have a direct impact on the performance of the accommodation market in Miramichi, it has been included to provide context for the regional and local accommodation market.

**Table 30: New Brunswick Accommodation Market Performance Results**

Year	Occupancy	ADR	ADR % Growth	RevPAR	RevPAR % Growth
2009	55.2%	\$109.53	-1.0%	\$60.46	-7.3%
2010	55.9%	\$109.39	-0.1%	\$61.15	1.1%
2011	54.9%	\$109.35	0.0%	\$60.03	-1.8%
2012	54.8%	\$107.78	-1.4%	\$59.06	-1.6%
2013	55.3%	\$107.37	-0.4%	\$59.38	0.5%
2014	54.8%	\$110.36	2.8%	\$60.48	1.9%
2015	54.4%	\$114.90	4.1%	\$62.51	3.4%
2016	58.2%	\$116.43	1.3%	\$67.76	8.4%
2017	60.7%	\$121.43	4.3%	\$73.68	8.7%
2018	60.7%	\$125.39	3.3%	\$76.05	3.2%
2019	59.5%	\$128.50	2.5%	\$76.51	0.6%
CAGR	0.8%	1.6%		2.4%	

Source: CBRE Hotels

- Between 2011 and 2015, the provincial occupancy level remained relatively flat at 54% to 55% annually.

<sup>13</sup> <http://www.cbre.ca/EN/services/valuationservices/hotels/Pages/trends-custom-research.aspx>



- During that period ADR<sup>14</sup> growth across the province was relatively muted, declining in 2012 and 2013 before improving by 2.8% in 2014.
- Between 2016 and 2019, occupancy levels improved increasing to the low 60% range. The increased demand along with new room product entering the market helped to drive ADR growth of approximately 2.0% per annum.
- Year-end 2019 results indicate growth in ADR performance for New Brunswick at \$128.50, an increase of 2.5% over 2018. RevPAR is up 0.6% to \$76.51, despite a 0.4% drop in demand, resulting in lower occupancy levels.
- New Brunswick is a very seasonal market with majority of travelers visiting during the summer. Throughout the winter, domestic and US tourist visitation is low and the timing of major holidays (i.e. Easter) can have an impact on performance month to month.

Information about the competitive Miramichi accommodation market performance has also been sourced using data available in the CBRE Hotels Trends database, and statistics available through the New Brunswick Department of Tourism, Heritage and Culture. This Department tracks a number of key performance indicators for the tourism industry at the provincial and regional level, including supply and demand in the accommodation industry, campsites occupied in Provincial Parks, visitation to Provincial VICs, and US overnight visitation. According to the Province, the Miramichi River & Southeastern NB region offered an inventory of approximately to 540 guest rooms in 2019, and achieved occupancy rates of 44%, down one percentage point from 2018 levels (45%).

The following tables presents the competitive hotel/motel market for Miramichi, based on CBRE data and regional research, which featured six properties and 359 rooms in 2019.

**Table 31: City of Miramichi Hotel/Motel Supply 2019**

No.	Name	Location	Rooms	Type	Total Meeting Space (SF)
1	Knights Inn Miramichi	333 King George Highway	60	Limited Service Hotel	700
2	Howard Johnson Inn Miramichi	1 Jane Street	66	Limited Service Hotel	1,000
3	Rodd Miramichi River Lodge	1809 Water Street	79	Full Service Hotel	4,040
4	Econolodge Miramichi	365 Pleasant Street	38	Limited Service Hotel	-
5	Days Inn Miramichi	201 Edward Street	64	Limited Service Hotel	425
6	Fundy Line Motel	869 King George Highway	52	Limited Service Hotel	-
<b>Total</b>			<b>359</b>		

**Source: CBRE Hotels**

<sup>14</sup> Average daily rate.



**Table 32: City of Miramichi Hotel/Motel Market Performance Results**

	2015	2016	2017	2018	2019
Rooms	359	359	359	359	359
Annual Occupancy	45%	52%	54%	53%	52%
Average Daily Rate	\$92	\$94	\$98	\$102	\$107
RevPAR	\$42	\$49	\$53	\$54	\$56
<b>Total Market Growth</b>					
	2016	2017	2018	2019	
Available Room Nights (Supply)	0.3%	-0.3%	0.0%	0.0%	
Occupied Room Nights (Demand)	15.2%	2.2%	-1.4%	-1.4%	
Average Daily Rate	2.5%	4.4%	4.5%	4.2%	
RevPAR	17.7%	7.0%	3.0%	2.8%	

**Source: CBRE Hotels**

- Supply in the market has remained stable with no new supply additions over this historic period, apart from the rebranding of the Rodeway Inn to a Knights Inn.
- Over the past 5 years (2015-2019), the Miramichi accommodation sector saw demand grow at a CAGR of 3.5% as Leisure travel increased and general improvements in economic conditions induced additional business travel, with no increases in rooms supply.
- Market occupancy in the Miramichi accommodation market has fluctuated from the mid 40% to the low 50% range, despite limited economic growth with a number of significant closures – mostly in the lumber and pulp and paper sectors.
- Average Daily Rates (ADR) have increased year over year, improving from \$92 to \$107, with a Compound Annual Growth Rate of about 4%.
- By year-end 2019, occupancy levels had decreased by about 1 percentage point to 52%, while ADR increased by over 4% to reach \$107, leading to 3% RevPAR growth.
- The competitive Miramichi Hotel/Motel market achieves occupancy levels 6 to 8 percentage points lower than the competitive Provincial hotel market, yet 8 points higher than the Miramichi River & Southeastern NB region.

From a market segmentation perspective, CBRE research indicates that the largest source of overnight demand is the leisure segment, which is primarily driven by people coming to the area to take part in or visiting tourist attractions in and around eastern New Brunswick, as well as visiting friends and family. In addition to summer events, such as fishing derbies and folk festivals, Miramichi is a popular stopover destination for snowmobilers in the winter, as provincial trails pass through the region. In terms of meetings and event demand, the Rodd Miramichi River Lodge is the property with the most considerable amount of function space, and it is our understanding that this space is primarily used for social groups.

With respect to seasonality, peak season in the competitive market is relatively short, with occupancy levels reaching 70% to 80% in July through September. Over the balance of the year, monthly



occupancy levels range from 30% to 50%. There is very little difference in ADR month to month with only modest rate yield, in the range of \$5 to \$10, in the summer months.

Data provided by the City indicates that over the 2016 to 2019 period, 16,736 people passed through the Miramichi VIC, of which 39 percent were Quebec residents, 39 percent from New Brunswick, nine percent from Ontario and the remaining 13 percent from other parts of Canada, US and Overseas locations. Over the years, the origins have changed somewhat, with stronger levels of tourism deriving from outside the Province.

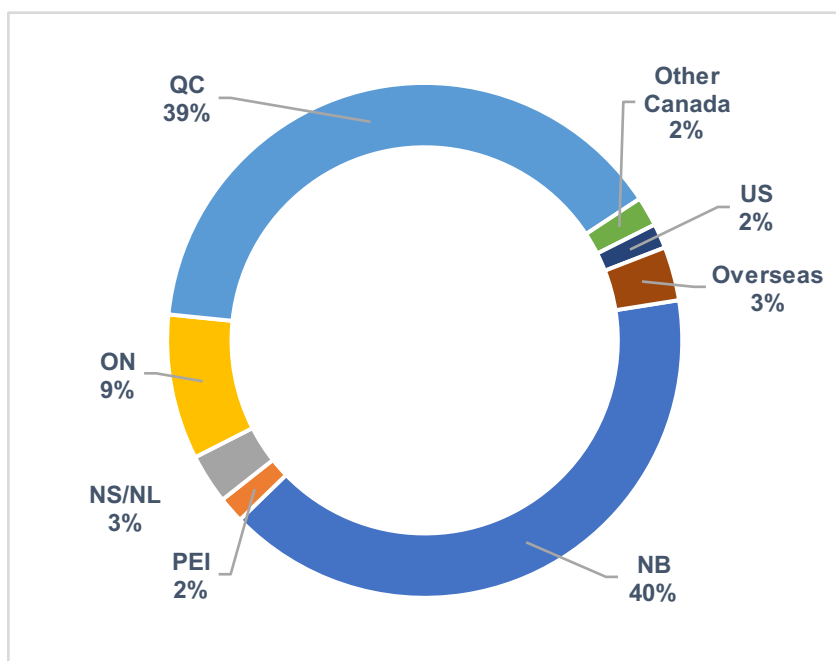
A 15 percent decline in visitors to the VIC occurred in 2019 over 2018, which relates to the overall drop in overnight demand to the City's accommodation market. In comparison to the year prior, the largest increases in 2019 visitation to Miramichi came from within New Brunswick and Prince Edward Island, while the largest decreases came from Quebec and the US.

**Table 33: Miramichi Visitor Information Centre Statistics – 2016-2019**

YEAR	ORIGIN OF TRAVEL								Total
	NB	PEI	NS/NL	ON	QC	Other Canada	US	Overseas	
2016	2,259	57	115	407	1,428	181	94	69	4,610
2017	1,246	48	142	256	1,472	143	117	137	3,561
2018	1,392	33	175	482	2,157	93	141	152	4,625
2019	1,585	65	123	359	1,541	73	61	133	3,940
<b>TOTAL</b>	<b>6,482</b>	<b>203</b>	<b>555</b>	<b>1,504</b>	<b>6,598</b>	<b>490</b>	<b>413</b>	<b>491</b>	<b>16,736</b>

Source: City of Miramichi, Economic Development and Tourism Department

**Figure 29: Miramichi Visitor Information Centre Origin of Travel Analysis - 2019**



Source: City of Miramichi, Economic Development and Tourism Department



## 4 Industry Trends and Outlook

In addition to the demographic and economic analysis detailed earlier in this report, it is important to consider broader industry trends and development to put Miramichi's performance into context and to help identify emerging opportunities and challenges:

<i><b>Industry group:</b></i>	<i><b>Recent trends:</b></i>	<i><b>Outlook:</b></i>
<b>Agriculture</b>	<p>Miramichi has low employment and little direct economic activity in the agriculture sector. There is however a major dairy production manufacturing facility and several retail bakeries.</p> <p>Some residents of Miramichi commute to work in fish processing activity on the coast.</p>	<p>There is increasing demand for more local food (e.g. 100-mile diet) and for more food to be produced locally to ensure food security. The Miramichi CA could be positioned as a centre for local food processing.</p> <p>The food Tourism Strategy also notes the opportunities for defining the local tourism brand through local food offerings.</p>
<b>Forestry, fishing, mining, quarrying, oil and gas</b>	<p>The Miramichi region in the past had much larger mining, forestry and forest products industries. There are less than 100 people working in forestry and logging and 265 working in mining (however some of these are employed in western Canada).</p>	<p>New Brunswick's fish and forest products are in demand across North America and beyond. There are a number of potential mining projects in the wider Miramichi region and central New Brunswick.</p> <p>As a regional hub, there may be opportunities for the development of these natural resources industries.</p>
<b>Utilities [22]</b>	<p>The Miramichi CA has relatively few people working in the utilities sector.</p>	<p>Renewable energy is expected to continue to grow in consumer demand and in response to government clean energy goals. There may be opportunities to target renewable energy projects in Miramichi.</p>
<b>Construction [23]</b>	<p>Miramichi has above average employment in the construction sector relative to the country overall. However, there are considerably fewer employed in engineering and services to support construction.</p>	<p>The declining population and growth in the number of workers age 55 and over in this sector could represent a challenge in retaining workers to support the construction sector in the years ahead.</p>
<b>Manufacturing [31-33]</b>	<p>At the time of the Census, there were approximately 500 people still working in manufacturing although the number is down significantly in the past 20 years. There are several large locally owned manufacturers and several national or international firms.</p>	<p>Lower margin manufacturing faces heavy competition – increasing labour costs and higher transportation costs in New Brunswick generally is a growing challenge. The manufacturing sector in general needs to become more productive. Manufacturing based on local natural resources continues to have a strong value proposition in general (based on proximity to the resource). There may be opportunities to build on</p>





<i><b>Industry group:</b></i>	<i><b>Recent trends:</b></i>	<i><b>Outlook:</b></i>
<i><b>Wholesale and retail trade [41, 44-45]</b></i>	Miramichi has more than 2,000 people working in retail, 33% more than the national workforce (adjusted for size).	<p>the local natural resources including forest products, fish, agriculture or mineral processing.</p> <p>The death of retail trade has been prophesized for years. The Miramichi CA can continue its role as a regional trade hub even as the business to customer model evolves. Retailers may need assistance to transition to new consumer demand. The City can play a role in supporting retailers to adapt to evolving consumer demand and identifying niche retail opportunities.</p>
<i><b>Transportation and warehousing [48-49]</b></i>	In 2016 employment in this sector dropped to 455. Most of the trucking and related jobs have been related to the forest products and other manufacturing sectors which have declined in recent years.	<p>The region needs to ensure it has the workforce to meet labour demand (e.g. truckers) to facilitate the free-flowing of goods in and out of the City.</p> <p>The City should consider its role in vanguard activities such as drone deliveries, driverless vehicles, big data, electrification of the transportation system.</p>
<i><b>Finance, insurance, real estate [52-53]</b></i>	Miramichi has very little employment in finance and insurance. There were 180 working in these sectors in 2016 – adjusted for size the lowest level of employment among all benchmark communities in this report.	There are very low levels of employment in banking and insurance sectors in Miramichi. The City may want to consider the potential to attract additional activity to the City and whether current levels are leading to leakage of economic activity elsewhere.
<i><b>Professional, scientific and technical services [54]</b></i>	Miramichi has relatively limited employment in most professional services sub-sectors (slightly above average employment in accounting services).	Secondary urban centres like Truro and Summerside have relatively low employment in professional services. Specialization in some professions requires larger urban markets. However, it might be a good idea to engage with the sector to determine if there are gaps that could be addressed.
<i><b>Business, building and other support services [55-56]</b></i>	As of the 2016 Census, Miramichi had over 700 employed in administrative services (over 400 in business support services). This means somewhere in the range of	The back-office sector is still one of the largest export sectors for the New Brunswick economy. The recent closure of several large contact centres in Moncton, Fredericton and Saint John are





<b>Industry group:</b>	<b>Recent trends:</b>	<b>Outlook:</b>
<b>Educational services [61]</b>	<p>\$20 million to \$30 million in export revenue for the local economy.</p> <p>The NBCC is a strategically important education asset and will be more so in the future as a conduit for the attraction of international students to the community.</p>	<p>a sign that the industry is changing but other firms are expanding.</p> <p>Education has not been considered an economic development sector, but it should be. Every 100 post-secondary education students boosts provincial GDP by over \$2.5 million and supports 60+ jobs. Further, the student population is critical to the talent pipeline in the region.</p>
<b>Health care and social assistance [62]</b>	<p>Miramichi has above average employment in health care overall (below average in dentist offices). Home health care and assisted living are growth sectors in other urban centres.</p>	<p>The City should consider additional opportunities for growth from an economic development perspective. There may be an opportunity to promote Miramichi as a destination for assisted living facilities and home health care.</p>
<b>Information, culture and recreation [51, 71]</b>	<p>The NBCC offers two programs in video game development and animation and has for many years. This has not resulted in much economic activity as most graduates leave the region.</p>	<p>Is there an opportunity to leverage the NBCC program to encourage more startup companies or remote work related to video game development and animation?</p>
<b>Accommodation and food services [72]</b>	<p>The Covid-19 pandemic will hurt tourism in the short run and likely change the industry in the longer term in ways not yet understood. It could lead to more staycations as New Brunswick residents look for opportunity closer to home. Miramichi has above average employment in the food services sector and below average in accommodation services.</p>	<p>Although the new accommodation levy will be limited in the short-term, this could be a good time to look strategically at the sector to see if there is potential for more visitor-attracting tourism investment (as opposed to just packaging and promoting existing assets). The City may need to consider the future for festivals/events post COVID-19. There may be additional opportunities for more structured ecotourism, especially with the advent of socially distant tourism.</p>
<b>Other services (except public administration) [81]</b>	<p>As discussed below, urban centres such as Miramichi tend to be personal services hubs for a wide area. People will commute into the City for access to these services.</p>	<p>As this sector is mostly related to local markets (hairstyling, funeral homes, landscaping services, etc.) it isn't typically the focus of proactive economic development efforts. These businesses will have the most immediate revenue</p>



<i>Industry group:</i>	<i>Recent trends:</i>	<i>Outlook:</i>
<b>Public administration [91]</b>	The federal payroll centre in the City was the largest single economic development project in years. Across all federal departments, there are now nearly 1,000 federal employees in the City (4 times the national average).	impacts from the COVID-19 crisis, however, some of which cannot be recaptured. Strategies to support business continuity and address emerging service gaps will be important to support local employment and reduce retail leakage  Public administration is an important sector of the economy and will be well into the future although potential deficit reduction efforts in the coming years (post Covid-19) will likely mean less growth potential.

## 4.1 Key Findings

### Population:

- The population in Miramichi CA has declined over the past 15 years, like most other small urban centres in Atlantic Canada, declining from 29,328 in 2006 to 28,000 in 2019.
- The population is also aging with 171 people over the age of 60 living in Miramichi for every 100 under the age of 20.
- The number of immigrants settling in Miramichi has increased to 84 in 2018 but is still well below larger urban centres in Atlantic Canada.
- Miramichi had a positive migration rate with 117 more people moving in than were moving out. The top source of inward population was non-CMA/CA areas of New Brunswick.

### Income:

- The average employment income in Miramichi has increased by 27 percent since 2008. It is on par with the benchmark communities but approximately 20 percent below the Canadian average.
- The number of persons earning employment income in Miramichi has dropped slightly (by 1 percent) between 2012 and 2017.
- There were 59 CPP income earners for every 100 people reporting employment income in 2017; a 14 percent rise from 2012. On the current trajectory, Miramichi could have as many people earning CPP as employment income within a decade.
- Miramichi has the highest rate of Employment Insurance program recipients among the benchmark communities at 33 percent.

**Employment:**

- There were an estimated 12,900 people active in the labour force in 2019 down from its recent peak of approximately 15,000 in 2014.
- The unemployment rate most recent peak was 14.9 percent in 2011. The rate had been gradually declining to 9.6 percent in 2018 before it rose in 2019 to 12.4 percent.

**Industry:**

- The largest employers by industry in Miramichi are retail trade, health care and social assistance, other (which includes personal services, administrative, arts and communications) and public administrative industries.
- There is above average employment (adjusted for population) in fishing hunting and trapping, forestry and logging and federal government public administration when compared to national rates.

**Tourism Sector:**

- Tourism is an important generator of demand for Miramichi, and one that the City and Region are actively trying to grow.
- Miramichi is best known for its nature and outdoor experiences, featuring the Miramichi River, coastal beaches, forests and parks, as well as unique historic sites.
- There are some challenges to Miramichi's product and experience inventory, including strong seasonality and limited wayfinding.
- As an indicator of performance, over the past 5 years (2015-2019), the Miramichi accommodation sector saw demand grow at a CAGR of 3.5% as Leisure travel increased and general improvements in economic conditions induced additional business travel, with no increases in rooms supply.

**Preliminary Tourism Product/ Experience Categories:**

The following product and experience categories have been identified for the current tourism asset offerings in Miramichi. Most of the tourism products are located outside City limits with the hotels and restaurants in the City.

- Accommodation
- Attractions
- Culinary Tourism/Agritourism (Riding stables, etc.)
- Heritage sites
- Arts & Culture
- Marina/River experiences
- Shopping/retail (Douglastown)
- Recreation
- Event Tourism
- Sport Tourism



#### 4.1.1 Priority focus areas

The economic analysis review helps to identify areas for consideration for the new economic development strategy. Addressing opportunity in each of these seven areas will position Miramichi for growth in the years ahead.

##### **People attraction (workforce and students)**

As is detailed in this report, Miramichi will need to attract younger workers from outside the region in the coming years just to replace those leaving the workforce through retirement. To address both replacement and potential growth demand will require a steady stream of new population into the region. Attracting more students to the New Brunswick Community College (NBCC) Miramichi campus will be an important tool for people attraction. These students are an important source of talent for the workforce to replace those exiting due to retirement. Programs should be offered that give students the skills to work in locally available jobs.

##### **Housing development**

The apartment vacancy rate in Miramichi is extremely low and there is limited new housing development. It is critically important to have new, reasonably priced housing and rental options to accommodate a growing population.

##### **The growing services-based economy**

Most urban centres across Atlantic Canada are shifting to more services-oriented economies. Miramichi is no different having witnessed a decline in manufacturing, mining and agriculture employment in the past 20 years and a modest increase in services employment. As the community looks to the future, this does not mean ignoring potential opportunities in manufacturing, mining and agriculture but it does highlight the importance of services industries as an area for growth.

##### **Export-focused development**

It is also important for the economic development strategy to be focused on industries that have export potential. There are some cases where developing locally-focused industries can be part of the strategy – particularly if it means import substitution – but most of the focus needs to be on sectors that bring revenue into the local economy (exports). These can be both product and service industries. Tourism, for example, is an important export industry as it brings money into the region that is spent on local goods and services.

##### **Local service-focused development**

As a regional services hub, it is important for the community to focus economic development efforts to ensure the economy is providing a wide range of personal and professional services to discourage leakage of economic activity to larger urban centres. As will be developed below, Miramichi has above average employment in a number of regional service-based industries such as funeral services, nursing homes and repair and maintenance services but well below average employment in areas such as legal services and accommodation services.



## **Entrepreneurship support**

Like Miramichi, most urban centres offer a variety of services to support new entrepreneurs. This will continue to be strategically important service in the community in the years ahead as the region needs to incubate a new generation of entrepreneurs (over 40% of business owners are over the age of 55).

## **Aligning the economic development ecosystem**

Another very important consideration when preparing an economic development plan for a community is the capacity to actually develop specific opportunities. It is one thing to identify industries that may have opportunity for development but deliberately doing things to attract investment, foster exports and strengthen the value proposition for the opportunity takes time and resources.

The City of Miramichi is only one actor in the economic development ecosystem. There are provincial and federal government partners. There are industry associations/groups. There are educational institutions and individual firms that would have interest in developing specific sectors of the economy. An important role for a regional economic development agency is the identification of all the stakeholders related to the potential of a specific opportunity and taking steps to align efforts to move the specific opportunity forward. This approach and the role of the City is developed below.

## **Developing an Inventory of Tourism Products & Experiences that Support Regional Strengths**

Although the City of Miramichi's Strategic Plan includes a detailed descriptions of regional tourism assets and events, no detailed inventory has been made available from which to build itineraries. Miramichi's tourism offerings are regional in nature, yet there does not appear to be strong links between products that lead to tangible experiences that can be easily marketed. Examples of tourism product/experience categories include: Culinary Tourism/Agritourism (e.g., Riding stables), Heritage sites, Marina/River experiences, Shopping/retail (e.g., Douglastown), Festivals & Events, etc.

## **Creating an Online Tourism Presence with Tourism Itineraries**

Today's tourists are looking for content-based experience that they can access online. For example, developing culinary tours featuring cultural offerings that reflect Miramichi's ties to land, sea/river and food, or urban experiences reflecting the historic downtowns of Chatham and Newcastle. Best practice research shows that it is important to understand and highlight existing strengths, particularly when the destination is challenged by seasonality.

## **Building Strong Tourism Partnerships to Attract Tourists (particularly in the short-term)**

As we know, current travel restrictions are expected to limit interprovincial and international travel for some time. Miramichi is a hub for tourism activity in New Brunswick, with a large percentage of visitors coming from Quebec and Ontario. The province has already recognized this fact, and through the "Hope Restored" marketing campaign, is asking people to consider spending tourism dollars in New Brunswick this summer. With borders potentially closed intra-provincially, it will be important to follow the provincial model in the short-term.



## 5 Appendix

### 5.1 Definitions

ADR	Average Daily Rate. The average rental income per paid occupied lodging room in a given time period.
CA	Census Agglomeration.
CMA	Census Metropolitan Area.
Commuting and commuting duration	Commute times are only for those who have a formal place of work (not working from home or with no fixed workplace address).
Employment by industry	The number of people employed in specific industries using the North American Industrial Classification System (NAICS). This is based on where people live and not where they work.
Employment by occupation	The number of people employed in specific occupations using the National Occupational Code system. This is based on where people live and not where they work.
Employment rate	The share of the adult population (aged 15+) that is employed.
Labour force	The adult population in a community that is working or actively seeking work at a given point in time. Annual labour force estimates (used in this report) for employment, unemployment, etc. are based on the average monthly figures for the year.
Migration characteristics	The share of the current population age five and over (2016) that was not resident in the community in 2011; by source. (percentage 5-year migrants by sources) Intraprovincial migrants came from other Census Divisions (counties) in New Brunswick; Interprovincial migrants came from other provinces; and External migrants came from outside Canada.
NAICS	The North American Industry Classification System or NAICS is used by business and government to classify business establishments according to type of economic activity in Canada, the U.S. and Mexico.
NOC	The National Occupation Classification (NOC) system is Canada's national system for the for describing the work performed by Canadians.
Participation rate	The share of the adult population (aged 15+) that is 'participating' in the labour market (either working or actively looking for work).
RevPAR	RevPAR, or revenue per available room, is a performance metric in the hotel industry that is calculated by dividing a hotel's total guestroom revenue by the room count and the number of days in the period being measured.
Self-employment rate	The share of the employed adult population (aged 15+) that is primarily 'self-employed'.
Unemployment rate	The share of the adult population (aged 15+) that is actively looking for work but not employed.



## 5.2 Detailed Literature Review

### 5.2.1 City of Miramichi Economic Development and Tourism Department Operational Review, November 2019

An operational review of the Department of Economic Development and Tourism made a number of observations in the following strategic areas: Structure, principles, programs and processes and performance.



**Structure:** The report recommended retaining the existing structure with economic development and tourism department to facilitate a coordinated approach to the two areas. The report recognized the role of private sector and regional tourism stakeholders and recommended that Miramichi's staff focus on the tourism product development and issue a request for proposals for regional tourism marketing services, funded by a portion of the new accommodation levy. By contracting the regional tourism marketing services, City staff could put greater emphasis on tourism product development, workforce development, modernizing visitor services and supporting tourism operators.

**Principles:** The report recommended the development of an updated economic development and tourism strategic plan with a greater emphasis on cooperation and collaboration with businesses, community leaders and stakeholder groups. The report also included recommendations to work more closely with the Province to leverage provincial funding and other supports.

Communication was identified as a key priority for the department. The report recommended adopting performance measures and regular reporting to Council and residents of Miramichi. Communication will also be critical to encourage partnership, pooling resources and informing Council, businesses, stakeholders and residents on department plans activities and outcomes.

**Programs:** The operational review included recommendations to ensure Miramichi is investment ready for existing and prospective businesses. This included a review of the development process and a greater role for economic development staff in facilitating businesses through the process. The report recommended supporting investment attraction efforts including assembling community data to support business decisions and updating the City's economic development website. It recommended nurturing the relationship with *Opportunities New Brunswick* to help identify and pitch projects to investors from outside the region. The report encouraged expanding the department's





efforts to include people attraction to address business needs, fill vacant community jobs, attract immigrant entrepreneurs to meet community succession needs and start new businesses.

**Processes and Performance:** The operational review recommended focusing on three priority areas: investment attraction, business retention and expansion and tourism market readiness. With the related objectives and actions to be defined during the development of the economic development and tourism strategy. It further recommended that the Department establish Performance Measures aligned with the actions to ensure a continued focus on the strategic plan's vision and priorities.

The review included recommendations to enhance the department's efficiency through technological updates including use of a CRM system to track business retention and investment attraction efforts and report on department activities and performance. The report recommended establishing the economic development and tourism website as the foundation for the departments marketing and communication efforts with supporting social and other communication tools aligned with consumer and business practices. It recommended greater adoption of digital marketing, social media, video, searchable databases and mapping in the marketing efforts.

### 5.2.2 City of Miramichi Strategic Plan 2014 – 2019

#### **Summary of Recommendations and Strategic Focus Areas, Implementation Roadmap**

- The Plan focused on four strategic areas: economic development, community service and culture, municipal governance and infrastructure.

**Vision** Miramichi - a beacon for economic prosperity, heritage and diversity

**Mission** Building Miramichi's economy and quality of life through "the very best" service leadership and innovation

**Strategic Priority 1:** Economic Development - Strengthening our economic base by diversifying and building upon our competitive strengths to create a positive environment for business investment.

- Key to attracting new business and employment is investment readiness which includes
  - Economic development planning and preparedness,
  - Sustainable land use capacities,
  - Information and communications capacities, and
  - Whether the community supports a progressive business environment

#### **Economic Development Goals and Objectives**

- Six goals and related objectives were established to address Economic Development challenges and opportunities:

##### **E1: Facilitate creation and expansion of business**

E1.1 Establish a clear process for all development

(City development committee, mandate, success metrics and communication plan, developer guidelines)

E1.2 Implement initiatives to attract new business and expansion of existing business

(Business retention and expansion program, marketing materials, explore incentives)





E1.3 Diversify the economic base

E1.4 Respond to retail market demand of our region

**E2: Inspire the entrepreneurial spirit of our youth**

E2.1 Engage our youth in the solutions and projects that instill entrepreneurial spirit and employment

(Junior achievement, entrepreneurial development program)

**E3: Increase the population of the City of Miramichi**

E3.1 Attract new citizens and retain current people

(new business and investors, immigrant investment, employment programs)

E3.2 Position our human assets to take advantage of new economic opportunities

(assess human resource needs, identify and address skills gaps)

**E4: Support investments in infrastructure that have potential economic benefit**

E4.1 Support investment in all modes of transportation – air, roads, rail, and water

(transportation study, infrastructure initiatives)

E4.2 Support strategic placement of municipal infrastructure investments that have a positive economic impact

(economic impact assessments)

**E5: Enhance City relationships with business and government**

E5.1 Establish and maintain open lines of communication with business organizations

(appoint staff to business groups, progress updates, feedback mechanism)

E5.2 Consult with community organizations on common initiatives

(steering committee for large events)

E5.3 Initiate and promote projects and programs with other levels of government

E5.4 Clarify mandate and membership of One Voice

**E6: Position and promote the City of Miramichi based on its current strengths and assets**

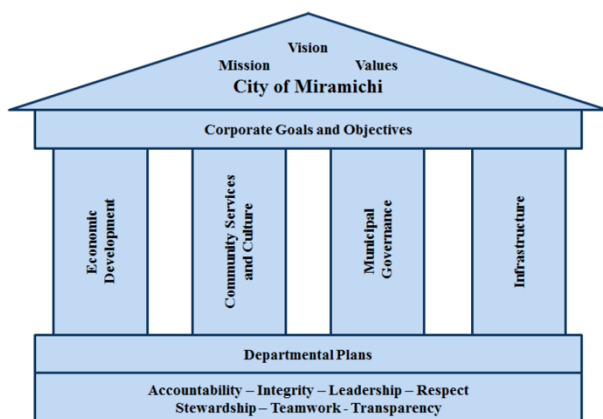
E6.1 Promote Miramichi as a regional retail and service center

(position shale gas service centre, supply chain management, correctional service opportunities, regional retail, education and training)

E6.2 Redevelop Miramichi as a regional forestry center

E6.3 Explore and develop strategies to promote the Miramichi region as “the very best” business location

(website, asset map, branding, Miramichi Network Initiative)



Relative to tourism, there is a recommendation to develop a comprehensive approach to the development of the local economy, combining tourism development initiatives with all other economic development activities, thereby expanding business opportunities and development synergies

- Out of this document came the recommendation to combine Economic Development, Community Development and Tourism, and Culture into one

department; with a new position of Communications Coordinator to have responsibility for communications with the public and various boards and commissions, maintaining the corporate website and marketing and promotion material

- Of the 5 corporate goals: embrace a culture of customer service, and attract and retain the very best personnel, are closely connected to tourism
- Community & business expectations also reflect the need to enhance the economy and diversify to attract business, i.e. develop infrastructure & services required to attract business opportunities, increase promotion and marketing, and become a regional retail and service centre
- 4 strategic areas were identified:
- Under **Economic Development**, the following goals are relevant to tourism:
  - Council wants a stronger focus on tourism, with a goal of diversifying the economic base by attracting new tourism businesses and investors
  - Another goal is to position and promote Miramichi based on its current strengths and assets by promoting Miramichi as a regional retail and service centre
- Under **Community Services & Culture** is it mentioned that the location of the City of Miramichi, the community's attractiveness and amenities for residents, business and visitors, including historic landmarks, waterfront, and cultural activities are some of the things that set the City apart from other cities. It's also noticed that there's a heavy reliance on volunteers – which could point to the limitations on resources and an aging population.
  - One of the goals is to effectively market the City and its resources to business, visitors and residents, by promoting the benefits of leisure recreation and tourism, i.e.
    - Encourage development of and promote water-based activities
    - Explore additional sport tourism opportunities, Identify events, Measure impacts
  - Another goal is to continue partnerships that improve service opportunities, and celebrate cultural heritage, i.e.
    - Liaise with cultural groups (Acadian groups, FN, Irish and Scottish groups)
    - Create a Cultural Policy
  - For the goal to increase and sustain the number of visitors to the City, the objective is to develop and encourage tourism initiatives to stimulate economic development activity, i.e.



- Increase the role of City Tourism in development of tourist initiatives
  - Encourage and support individuals and organizations developing new tourism product
  - Strive to host at least one large scale event on an annual basis (e.g., 2016 Tall Ship Festival, 2017 Jeux D'Acadie Airshow)
- Under **Infrastructure** - continuing to invest in the City's infrastructure is the primary focus
  - Relative to tourism, one goal is to encourage strategic property development and management, including appropriate waterfront development
- Relative to tourism, there is a recommendation to develop a comprehensive approach to the development of the local economy, combining tourism development initiatives with all other economic development activities, thereby expanding business opportunities and development synergies
- Out of this document came the recommendation to combine Economic Development, Community Development and Tourism, and Culture into one department; with a new position of Communications Coordinator to have responsibility for communications with the public and various boards and commissions, maintaining the corporate website and marketing and promotion material

## Background Report

- The Background Report provides some useful information on the City's tourism asset inventory:
  - 22 kilometers of walking, hiking and biking trails, many along the Miramichi River,
  - French Fort Cove a 245 plus acre multipurpose nature park located in the centre of the City
  - Two indoor pools
  - Two arenas
  - 18-hole golf course
  - Two marinas
  - Sport facilities: ball parks, soccer fields, tennis courts, curling club, etc.
  - Arts & culture: library and museum
  - Gateway to world-renowned salmon fishing and hunting
  - A certified airport (YCH) with 10,000 ft runway
  - Home to NBCC - Miramichi, rated amongst the top locations in Canada to train in 3D game programming and animation
  - Vibrant waterfront with Ritchie Wharf and Waterford Green
  - Promoted as the City of Festivals
  - Numerous heritage buildings and cultural resources.
- In terms of stakeholder engagement, it was noted that many businesses wanted more tourism related activities to increase the number of customers to their business.
  - Others wanted more year-round industry to have those customers in all four seasons.
- There is a need for greater promotion of the City and what it has to offer – skilled workforce, quality of life, tourism, and its capability to become a “regional retail and service Hub”.
- Partnerships with First Nations, Francophone communities and other diverse cultural groups is seen as important to the future development of the City



- Strategic Advantages relative to tourism:
  - Attractive tourism/ recreational area
  - Airport services and runway

### **Tourism and Destination Marketing**

- The report speaks to the future success of the City's tourism sector hinging on its ability to attract demand and fulfill and/or exceed their expectations. This means providing a quality experience that generates repeat business. To do so, the tourism sector must continually refresh and refine its existing offerings and introduce new experiences that respond to consumer tastes and that showcase the very best of the area's nature, culture and way of life.
- Tourism's ability to achieve significant economic and employment potential depends on marketing partnerships at all levels, and the involvement of all community interest groups and individuals.
- Strategies in this City of Miramichi Strategic Plan that relate to tourism include:
  - Exploring and developing strategies to promote the Miramichi region as "the very best" destination
  - Developing and encouraging tourism initiatives to stimulate economic development activity
  - Increasing the role of the department of Community Development and Tourism in the development of tourist initiatives
  - Encouraging and supporting individuals and organizations developing new tourism product
  - Striving to host at least one large scale event on an annual basis
  - Establishing a staff steering committee for planning large events
- Strategies in this City of Miramichi Strategic Plan that relate to river and waterfront development include:
  - Promoting the benefits of leisure recreation and tourism related to the river and water-based activities
  - Encouraging appropriate waterfront development
- Strategy for promotion of Miramichi as a Regional Retail and Service Centre:
  - Encouraging a variety of retail, dining and accommodation developments in proximity to current retailers, and aimed at households and out-of-town consumers
- The airport is an obvious economic strength and regular discussions need to occur between City staff and the Miramichi Airport to develop stronger partnerships and explore opportunities
- Goal for community to gain a competitive advantage as a "destination city" for cultural tourism

### **Tourism & Visitor Attraction Summary**

- This document provides a summary of tourism & visitor attractions from a descriptive perspective, but does not provide a full inventory
- The report summarizes the region from a destination perspective as being the gateway to salmon fishing and hunting on the Miramichi River, with a unique combination of natural assets, including the river – unimpeded by dams or obstructions, with the healthiest runs of Atlantic



Salmon in North America; access to coastal beaches; its extensive forests; and one of Canada's finest national parks, Kouchibouguac.

Other assets:

- Beaubears Island - home to two National Historic Sites: Boishébert National Historic Site of Canada; and Beaubears Island Shipbuilding National Historic Site of Canada J. Leonard O'Brien Memorial
- Enclosure Campground - also known as Wilson's point, this location marks the area of Miramichi that was first developed by settlers, now serves as a campground with 99 sites (private and semi-private), walking trails, a restaurant and bar, Flo's Hideaway with a capacity of 250 people.
- French Fort Cove - nature park located between Newcastle and Nordin with walking trails, canoeing, kayaking, paddleboats, a children's playground, and an ice-cream shop – and is the setting for the local legend of the Headless Nun.
- Middle Island – was used as a quarantine station when, in 1847, typhus and scarlet fever spread throughout the ship Looshtauk as it crossed the Atlantic Ocean. The island now serves as a tourist location and memorial.
- Rankin House - constructed in 1837 as the home of Alexander Rankin and is now a museum containing a collection of objects relating to early life in New Brunswick.
- Miramichi Natural History Museum -(c. 1908 to 1909) is designated as a Local Historic Place.
- Ritchie Wharf - a park located on the waterfront of Newcastle-Miramichi where many events take place; boardwalk is lined with restaurants, art galleries, and souvenir shops, and tourist information centre. There is also a children's playground with a small water park.
- Marine (Seamen's) Hospital - built in 1830–1831, it is the oldest surviving marine hospital in Canada, and now serves as a hall for a local church and the general public. It was designated a National Historic Site of Canada in September 2000.
- Community Attractions, Events and Festivals - Miramichi is known as the City of Festivals. Local festivals include:
  - Miramichi Folksong Festival
  - Annual Pow-wows hosted on the nearby Eel Ground First Nation and Metepenagiag Mi'kmaq Nation
  - La Fête Nationale des Acadiens—Acadian Day
  - Miramichi Scottish Festival
  - Canada's Irish Festival on the Miramichi
  - Miramichi Fiddle Festival
  - Canada Days Festival
  - Miramichi Rock 'n Roll Festival
  - Miramichi Salmon Classic
  - Miramichi Exhibition

### 5.2.3 Miramichi Development Plan Review,

#### **My Miramichi Background Report (December 2018)**

This report provides a comprehensive review of the City's current Municipal Development Plan (came into effect in July 2012) and its enabling By-laws.



- Miramichi is one of four municipalities in the Greater Miramichi Region.
- Miramichi is the 3<sup>rd</sup> largest City in New Brunswick by land area and 5<sup>th</sup> by population. Statistics Canada projects the population in the City will remain steady at around 17,000 into 2027.
- The City serves as a regional service hub for Northumberland County and surrounding regions with schools, hospitals, government offices, and retail locations.
- The former Towns of Newcastle and Chatham are the primary urban hubs.
- Land Use mix includes: 12 km<sup>2</sup> Industrial (7%), 4 km<sup>2</sup> Commercial (2%) 55 km<sup>2</sup> residential (34%) and 3 km<sup>2</sup> recreational (2%)
- The main regional transportation routes through the community are Highway 8 (west to Fredericton; north to Bathurst and Campbellton) and Highway 11 (south to Moncton, Prince Edward Island and Nova Scotia).
- Route 108 (Plaster Rock – Renous Highway) offers connection from Miramichi to major centres in Quebec and Ontario.
- The former Village of Douglastown has sustained residential growth and has established itself as a destination for commercial activity, with both local and chain “big-box” retail, restaurants, entertainment and related services.
- Industrial development is clustered in two purpose-build industrial parks in the former Towns of Chatham and Newcastle. A third major industrial park known as Sky Park Miramichi is located at the former CFB Chatham.
- Historical patterns of settlement along the length of the Miramichi River have resulted in sprawled, low-density, and at times quite rural development, even outside of the central areas of the former municipalities.
- The Miramichi River is often regarded as the common thread that ties together the amalgamated former municipalities and LSDs that now form the City of Miramichi.
  - **As a former working industrial port with opportunities for increased recreation and tourism potential, the River is an identifiable symbol that embodies the community.**
- Most of the working population is employed in retail trade (sales & service), with 7% in Accommodation & Foodservice, and 1% in arts, entertainment, recreation
  - Considered very low for a tourism destination
- **A proposed multi-use recreational facility project is underway in Douglastown**
  - This facility would replace two pools, a rink and a recreation centre with a “wellness centre” that would have an ice surface, aquatic centre, fieldhouse and a gym
  - Would be helpful to find out the timing on this project
- With respect to historic significance, there are over 100 sites registered with the Municipal Register of Local Historic Places, recognized for local “heritage value”
  - Miramichi is a participant in the Province of New Brunswick's local historic places program
  - The Municipal Plan will aim to support the identification, protection, and management of Miramichi's historic resources
- City located within New Brunswick Lowland within the Gulf of St Lawrence lowland forests ecoregion – part of the Appalachian Range



- Certain naturally sloped areas, such as those found near French Fort Brook provide recreational opportunities (e.g., walking, hiking, and biking trail systems)
- Nature Trust of New Brunswick has identified four sites within the City and Beaubears Island as “Environmentally Significant” - include Strawberry Point Marsh, Jones Cove/Oxford Cove, the Miramichi River shoreline at the former Village of Loggieville and the Miramichi River estuary itself
- Transportation projects planned for the City: Route 11 Twinning (Glenwood to Miramichi) set for 2021, Anderson Bridge Replacements (built in 1953 – new bridge to open in 2021), Northern Bypass (2 land road across northern fringe of City linking to Route 8)
  - Miramichi Public transit introduced in 2009 – 3 bus routes, avg. 50,000 passengers per year
  - Also served by rail, which is an advantage for future economic development – VIA operates between Montreal and Halifax with service to Miramichi 3 days / week

### What We Heard (August 2019)

The following stakeholder feedback was considered relevant to the economic development and tourism strategy:

- Addressing the affordability of housing and providing for a greater variety of housing forms are the most important housing issues in Miramichi.
- Residents feel that, live/work space should be located above commercial space on lower levels in Miramichi’s downtown cores.
- Home businesses in residential areas are accepted, particularly when the activity is compatible with the neighbourhood in which it is located.
- The most important economic development issues to address include promoting tourism in the City, increasing opportunities for more local employment and attracting new businesses to the City.
- Agricultural opportunities and activity in Loggieville should be promoted and increased.
- The airport is an under-utilized economic driver.
- Short-term rentals (e.g. AirBNB, bed and breakfasts, and inns) are viewed as having an economic benefit to the City and should be encouraged.
- The establishment of a farmer’s market in the City was also identified by respondents as an important need
  - This suggests that existing Newcastle Farmers Market (Fridays 10 AM – 2 PM) and Chatham Farmers Market (Saturdays 9 AM – 1 PM) may not be fully serving the needs of residents / visitors
- There is a desire to attract more big-box stores to the City.
- There is a desire to direct commercial development in Douglastown in a manner that capitalizes on river-views (e.g. casual dining).
- A need to increase the availability of commercial entertainment uses in the City was highlighted by students who identified imaginative opportunities for a year-round indoor amusement park, VR arcade, retro roller-skating rink, and indoor sky-diving facility
- People aged 19 and under identified their main concern as the availability of **facilities for community festivals and events**, whereas people aged 70+ were most concerned





- with creating **neighborhood spaces that can be used by everyone**, regardless of age or ability
- Interest in developing an integrated walking, hiking, running and cross-country ski trail system throughout the community
- Local and visiting ATV and snowmobile users bring an understated economic benefit to the City
- Introduce year-round access to the Middle Island Irish Historical Park
- Potential areas for new tourism development:
  - Infilling vacant sections of Water Street in Downtown Chatham.
  - Introducing a Waterfront Commercial in Douglastown, which would only permit uses that directly benefit the economic development of the River
  - Establishing a commercial hub in Chatham Head near the Miramichi Nursing Home and Regional Hospital
  - Introducing a public boat launch north of the Miramichi Bridge on Chatham Head side (lands owned by Province)

#### **Municipal Plan By-Law No 109 (February 2020)**

The section on Economic Development in the Municipal Plan has a specific sub-section on Tourism related policies:

- There is interest in promoting greater tourist visitation to the City through support of its tourist attractions, waterfront developments, trail systems, community events and festivals, recreational and cultural attractions, as well as through protection of its natural resources and environment and aesthetically pleasing appearance throughout the community. This requires communication between partnership in the community and the province
  - a. To develop, expand, and promote community assets which have potential as recreation and tourism attractions;
  - b. To maximize results of tourism marketing programs and initiatives; and,
  - To continue to encourage the development and expansion of regional tourism attractions and events.
  - Encourage and support local entrepreneurs and the Miramichi River Tourism Association (MRTA) in further enhancing and developing the tourism products offered.
  - Communicate to the local tourism industry the importance of provincial standards of quality assurance.
- The plan also mentions a proposal that areas designated “Rural” on the Future Land Use Map be intended to accommodate Tourism-Commercial Uses
  - Would like to better understand where these areas are located

#### **PRAC Views – Municipal Plan and Zoning By-Law (February 2020)**

- Timeframe of the new Plan in 2020-2030
- The strategy is based on five themes to guide development: rural city/urban assets, active transportation, housing diversity and affordability, downtown revitalization and climate change/environmental stewardship
- The Economic Development Section identifies emphasis a commitment to the downtowns, areas for diversification (i.e. tourism, cultural heritage, brownfield redevelopment); and positions





Miramichi as Northeast NB hub for retail and services; with a need to diversify the economy with emphasis on:

- Encouraging training and adaptability of our existing businesses and our workforce
- Supporting tourism
- Enhancing livability of the community
- Support community wellness through mobility, connectivity, and people-oriented places
- Improving the visual appearance of the community
- Encouraging redevelopment of brownfield sites and buildings
- New definitions relative to tourism have been introduced, particularly for specific land uses that were previously undefined, including: Distillery, Home-based tourism accommodation (replace B&B), Micro-brewery, Riding stable
- The plan includes establishing types of industrial areas, criteria for expansion of the industrial designation, includes expansion in the Chatham Industrial Park and provides direction for cannabis production facilities

## 5.2.4 Miramichi Downtowns Redevelopment Master Plans

**The Vision Downtowns Redevelopment Master Plans, (October 2019)**

**Miramichi Downtowns Backgrounder Report (November 2019)**

**Miramichi Downtowns Master Plan Final Draft (November 2019)**





- The Vision for the Downtown Redevelopment of Miramichi has some significant action items related to improving the tourism industry within two major downtowns
  - Uniquely, the City of Miramichi is home to two downtowns and waterfronts: Historic Chatham and Newcastle.
  - Investments in private and public spaces shall result in high quality, human places, fostering a strong sense of place to which residents and visitors connect.
  - Within this setting, the downtowns shall be destinations for a vibrant and complementary mix of retail, restaurants, institutions, offices, recreation, residences, and accommodations.
- CHATHAM PROJECTS: Station Wharf – upgrades to pier structure and increased public use (retail, etc.); Station Wharf Lane – 2-way corridor with public realm space, Waterford Green – “great lawn” with activity space for 4,000 ppl; Cunard Street; Parking District; Riverfront Park Wester Extension; Water Street Renovation, Chatham Campus; The Mapp Renovation; Riverfront Park East Extension
- NEWCASTLE PROJECTS: Ellen’s Walk – make Ellen St a pedestrian and business friendly corridor; Pleasant Street – 2 way corridor; Parking Management; Ritchie Wharf – needs upgrades to sustain visitation for the next 20-25 years, i.e. dedicated performance and retail areas, east end reserved for ancillary future benefits (accommodation, retail, recreation, etc.); Queen Elizabeth Square – Ellen’s walk is precedent to this; Miramichi Ship Heritage Centre – creation of a waterfront facility that’s both a local gathering and tourism asset, as well as service gateway for boaters, including a boat ramp and adjacent parking (between Kin Centre and Proposed Centre); Newcastle Boulevard Gateway; Ball Park Residential; Residential Village; Riverfront Greenway – recreation based with sports fields, etc.

### **Miramichi Downtowns Backgrounder Report (November 2019)**

The MD Backgrounder Report was prepared to support the development of the Miramichi Downtowns Master Plan in 2019. The report had six objectives including 1) to document lessons learned from previous downtown plans; 2) to explore Miramichi’s historical development patterns to ensure strategies and plans are evolutionary, not revolutionary; 3) consult with residents on their vision for downtown; 4) develop a phased approach to downtown development; 5) propose an administrative plan describing the roles of planning, economic development, etc.; and 6) develop a 20-25 year master plan for downtown development. There are two downtown areas – Newcastle and Chatham.

The consultations revealed 83 big ideas for downtown Chatham and 70 for downtown Newcastle. Built space ideas in Chatham included more residential including retirement living, commercial development aligned with cultural and historical elements and rethinking public parking in the downtown. There were also many ideas related to green spaces in the downtown, public parks, walking and recreation. The streetscape ideas revolved around beautification, lighting, wayfinding/signage and public art.

For Newcastle downtown, the recommendations were similar but with more focus on waterfront development, performance space, walking/biking and recreation.

The historical section of the report traced the development of Newcastle downtown since 1790 and the main anchor developments of each downtown including the establishment of St. Thomas College in Chatham in 1910 (and its subsequent relocation to Fredericton in 1964), the closure of a large forest



products mill in 1919, the Newcastle fire in 1948, the amalgamation in 1995, the closure of CFB Chatham in 1996 and the attraction of the federal public service pay centre.

The lessons learned section of the report focused on the diverse cultural heritages and the importance of the river to downtown development.

The opportunities and challenges section discussed the importance of a unified administrative strategy for downtown development and a shared vision. The potential flood risk in Chatham downtown was also identified as a key risk moving forward.

### **Miramichi Downtowns Master Plan**

The Downtowns Master Plan is founded on six pillars: livability, character, mobility, administration, environment and vibrancy. The vision includes several components. Within 20-25 years the downtowns shall: 1) host an authentic urban environment that communicates Miramichi's identity through its historical and cultural character; 2) the downtown centres shall have a seamless connection to their respective waterfronts, reinforcing a renewed relationship to the Miramichi River; 3) Investments in private and public spaces shall result in high quality, human places, fostering a strong sense of place to which residents and visitors connect; 4) Pedestrians of all ages and abilities shall navigate the downtowns using a well-connected mobility network of streetscapes that prioritize their safety and comfort; and 5) Within this setting, the downtowns shall be destinations for a vibrant and complementary mix of retail, restaurants, institutions, offices, recreation, residences, and accommodations.

The plan includes new boundaries for both the Newcastle and Chatham downtowns and elaborates on the concepts developed during the consultations and research phase of the project (backgrounder report). For Downtown Chatham this includes components such as a continuous waterfront green, historical downtown, mixed-use downtown core expansion and a residential interface. For Downtown Newcastle the main components include: regional gateway (from King George Highway), historic downtown, mixed-use expansion, residential growth, waterfront green space and expanding commercial development towards the river.

The plan develops in more detail issues such as width of streets, walking/bicycle lanes, circulation/traffic flows, etc. It also covers what are called Character Zones which define development activity within the two downtowns. These include downtown cores, mixed-use zones, commercial transition zones, and riverfront zones.

The master plan also breaks down development into phases: short-term, medium-term and longer term. For Chatham Downtown short-term development includes the Station Wharf project, the Water Street West to Station Wharf project and the Elm Park Project. In the medium term, the plan calls for the development of the Waterford Green, Cunard Street improvements, parking district and riverfront park. The long-term development includes Water Street renovation and the Mall Renovation.

For Newcastle downtown, short term includes the Ellen Street and Fountain Head Lane project, Pleasant Street development and parking management to mixed-use development. In the medium-term, Ritchie Wharf redevelopment, Queen Elizabeth Square, Newcastle Boulevard Gateway and the Miramichi River Gateway. In the longer term, mixed-use village, Riverfront Greenway and the upgraded hotel.

Supporting strategies include: Parking, physical infrastructure (water/sewer, etc.) and affordable housing.

Climate change is a broad-based theme throughout the Master Plan.



### 5.2.5 Food Tourism in Miramichi Region (Nov 2018)

Using Taste of Place to Enhance Atlantic Canada's Great Outdoors Miramichi River Tourism Association with CTA.

- This report explores the potential for local food tourism development in Miramichi, using best practice analysis
- Ties into New Brunswick Food Tourism Strategy (2017)
- Food tourism includes experiences where a person learns about, appreciates, or consumes food or drink that reflects the history, heritage, and culture of a place; includes agritourism activities that connect local food production to what is being prepared, served, and enjoyed by locals
- Objectives identified by MRTA:
  - Develop pride in place around the local food and drink of Miramichi Region;
  - Use food tourism products to drive new memberships to MRTA;
  - Develop food tourism products to help Miramichi Region become a year-round destination;
  - Work with operators to achieve market-readiness; and
  - Align with broader Miramichi Region marketing as "Atlantic Canada's Great Outdoors"
- In Miramichi – many iconic food experiences occur outside – aligns with regional brand
  - Riverside fish fry or lobster boil; involvement in harvesting (mushroom or berry picking, fishing) – tied to landscape
  - Also tied to culture – church suppers, etc.
- 6 challenges:
  - Market-readiness
  - Seasonality
  - Connecting to non-food assets
  - Storytelling
  - Pride in place
  - collaboration
- 8 recommendations
  1. Offer capacity-building workshops
  2. Develop a web and social media toolkit
  3. Develop an ambassador program
  4. Host industry events and meet-and-greets
  5. Develop food events and festivals during low and shoulder seasons
  6. Stock visitor fridges with local food
  7. Build up the region's winter offering through food and drink
  8. Develop guided interactive outdoor + cultural themed food and drink experiences for visitors
- Need implementation plan to move forward over 3 years – needs to align with regional visitor, as they are more frequent than national/int'l
- Some Miramichi Region Tastes of Place:



- Oysters, molasses, stews, salted foods, foraged, lobster boils, hands-on, open fire, clams, outside, poutine rapée, wild meats, fish, smelts, eel, sand bread, wild berries, fiddleheads, family gatherings, community, views of the water, feasts, traditional, culture.
- Miramichi Region's strong ties between land, sea, rivers, and food are worth celebrating – need to hands-on, outdoor food and drink experiences with visitors, and weaving cultural elements through each of these experiences will also be essential to authentic food tourism development

### 5.2.6 MRTA Product Experience Development Report – Jan 2019

(Redpoint)

- This is a very high-level report on the potential for tourism product and experience development in Miramichi
- The Executive Summary speaks to the overall “unfriendliness” of the destination relative to tourism products, and that what is promoted is seasonal, only available sporadically, offered through private relationships, or hard to find due to poor signage/wayfinding and/or lack of online promotion/presence
- Implication drawn is that Miramichi is designed for locals, not tourists
- Tourism is weighted to summer; snowmobiling in winter (but very niche), so the suggestion is to build credibility as a 4-season destination
  - Build itineraries around “reasons to come (and stay)” – thereby increase length of stay
  - Lots of event tourism – City works hard to bring in visitors for festivals, events, tournaments – need to create reasons to extend their visits (low hanging fruit)

#### Identified Asset Gaps

- Lack of diversity in the foodservice – need to create more than just sustenance
  - NB has lots of breweries, distilleries, wineries – need to offer local alcohol and tours
- No unique packaged experiences – ideas: beach boil on a private sandbar, tour of Beausoleil Oyster facility, learn lumberjack skills, history tour with Escuminac wharfmaster
- No rentals – mountain bikes, snowmobiles, canoes, kayaks, ATVs
  - This is diluting brand power as Atlantic Canada's Great Outdoors, and keeping away new experience seekers
- Missing modern family entertainment attractions, i.e. amusement park, water park, FEC – particularly indoor entertainment
- Lack of luxury resort accommodations
  - Note from CBRE – developers are not building full-service resorts anymore, due to the seasonal nature of demand and high capital costs.
- No Nightlife – theatre, late shopping, live music
- Seasonal disparity – summer

#### 3 Critical Observations

- Need to do some foundational work
  1. Need a robust, visitor-friendly destination website
  2. need a local marketing and brand awareness campaign: Forever. And ever. Never stop inspiring pride in the locals that they live in Atlantic Canada's Great Outdoors.



3. Need a comprehensive visitor-friendly regional map

#### 10 recommendations:

1. **Miramichi Signature Experience Collection** – will help to identify suitable candidates for ACOA Accelerated Market Readiness Program (AMR)
    - Ideas: Lumberjack Biscuit Classes at Woodmen’s Museum, Coffee with the Escuminac Wharfmaster, Mi’kmaq Music Experience, Behind the Scenes at La Maison BeauSoleil, Strawberry/Raspberry Tea at Tabusintac Library & Museum, Fly-Tying Classes at Atlantic Salmon Museum, Sandbar Boil-Ups, Do Miramichi with the Mayor
  2. **Miramichi After Dark**
    - Ideas: Outdoor Adventure & Fitness (moonlight yoga), Culture/History (Headless Nun Tour), Music (after dark cultural music series), Culinary (cupcake crawl), Cheers! (popup cider tents, hot toddy tents), Evening Stroll (on Priceville-McNamee Footbridge),
  3. **River Access Activities / Rentals with Instruction**
    - Snowshoes, cross-country ski gear... with instruction, snowmobiles, Sleds/tubes/mats for pulling kids on the river and/or using on area hills, Fishing rods – especially for kids – with instruction and designated areas where this is acceptable in the City, Jetskis, Kayaks, canoes, boats, Stand-up paddleboards, Paddle/Pedal boats
    - Miramichi Rover River Park (dog park)
  4. **Create Outdoor-Themed Events/Festivals** – Miramichi Spring River Romp, Miramichi River Games, Miramichi Snowman Festival, Miramichi Great Outdoor Film Festival
  5. **Brewery/Distillery with Tours** – needs branding, food onsite, interactivity & education, events & nightlife
  6. **First Nations Experiences** – idea to not only celebrate and draw attention to Metepenagiag Heritage Park, but to infuse Mi’kmaq First Nations cultural experiences into other tourism products
  7. **Acadian Night Market** – food, crafts, art, activities
  8. **Miramichi Outdoor Adventure Centre** – evolve the VIC into an Outdoor Adventure Centre; venue for showcasing events and packaged experiences, have refreshments and kids’ activity area
  9. **The Miramichi Winter Big Three** – snowmobiling, snowshoeing and cross-country skiing; create trails, resources and rentals
  10. **Upriver Luxury Hotel & Spa Development** – attract an experienced hotel developer; 50 rooms with 8 treatment rooms in spa, with outdoor activities and year-round restaurant, link with Fairmont or Four Seasons
- Branding campaign makes sense after the product development piece – need investment in infrastructure, visitor-friendliness training, etc. first



### 5.2.7 Miramichi Region Population Growth Action Plan (2019)

- The Region has been experiencing a steady decrease in population, which could lead to a stagnant economy
- 3-year action plan was developed to welcome and retain newcomers and returning residents
- Three segments: Come, Connect and Stay
- Newcomers have identified the City as being “quiet, private and safe”, which is considered an asset; they like the natural environment, parks and outdoor activities
- One of the action items is to “continue to promote Miramichi as a world-class retirement destination” It will be hard to do this and use the “Atlantic Canada’s Great Outdoors” campaign. It also contradicts plans to keep young people in the community

The Miramichi Region Population Action Plan was prepared in 2019 to determine what level of population growth is needed in the region and the plan to address that growth. The vision of the Action Plan is: “Miramichi will grow our population by welcoming new and returning residents from around the world, across Canada, and the rest of New Brunswick. We are and will continue to be a place where all cultures meet and live together, here in the Miramichi region, in the heart of New Brunswick.” The Action Plan’s mission is: “To create an inclusive integration strategy with full community participation. Community-based partnerships that envision a community where the meaningful economic, social and cultural integration of newcomers ensures a prosperous and inclusive community for all.”

The three pillars of the plan are:

1. **COME** – Actions to attract new and returning citizens to Miramichi;
2. **CONNECT** – Actions to enhance the newcomer experience and better and connect them to the community; and
3. **STAY** – Actions to retain all people in our region.

The plan includes population growth targets of 175 in 2019, 262 in 2020 and 350 in 2021 for a population growth over the three-year period of 787. NOTE: The implication is this is net growth not just population attraction (net of outward migration).

#### **COME actions:**

1. Increase momentum of attraction through all available immigration streams and other labour force attraction activities
2. Establish a streamlined local process and presentation for Provincial Nominees Exploratory Visits
3. Work with existing local cultural communities where we have had success in attraction to promote immigration
4. Target and support newcomer business relocation to Miramichi
5. Enhance Miramichi’s participation in the Francophone Mobility Program/Mobilité Francophone
6. Develop newcomer housing plan, to ensure adequate levels of suitable housing are available to newcomers upon their arrival
7. Develop Materials to promote and encourage repatriation of Miramichi expatriots living in other parts of the country
8. Continue to Promote Miramichi as a world-class retirement destination





9. Develop a “Why Move Here?” Marketing Collateral document / materials to aid in the attraction of newcomers to the City
10. Format Labour Market Knowledge data into a promotional document to be used as an attraction tool

**CONNECT actions:**

11. Host a comprehensive consultation including an open house and/or survey of current newcomers including specific sessions with TFW, students, and entrepreneurs.
12. Develop and build on our list of strengths to leverage, and focus areas for improvement
13. Formalize and bring attention to our Local Immigration Partnerships and have businesses / local groups sign up
14. Continue to host the “Mayor’s Welcome BBQ” Annually
15. Develop a centralized digital information hub for newcomers (website) with resources and information about the local culture
16. Continue to host regular smaller scale events that celebrate our increasingly diverse cultures
17. Offer cultural sensitivity training to front-line municipal staff and management of the City of Miramichi, and other regional municipalities
18. Offer cultural sensitivity training to frontline staff and owners/management
19. Offer cultural sensitivity training to Law Enforcement and First Responders
20. Identify ways to provide enhanced language training support for NBs two official languages
21. Work with local financial providers and landlords to create awareness of newcomer needs

**STAY actions:**

22. Regularly communicate newcomer success stories to the public. (Example: via local newspaper, social media & the partners websites.)
23. Develop a plan to stem out migration of our youth
24. Develop a strategy to make more international and nonlocal NBCC students aware of job opportunities here and keep more of them in the community after graduation
25. Support and encourage newcomer entrepreneurship & business
26. Utilize existing resources to provide mentorship opportunities for newcomers
27. Develop a formal recognition of newcomer achievements in business and in the community
28. Create more connections and opportunities for newcomers to engage in existing community activities and organizations