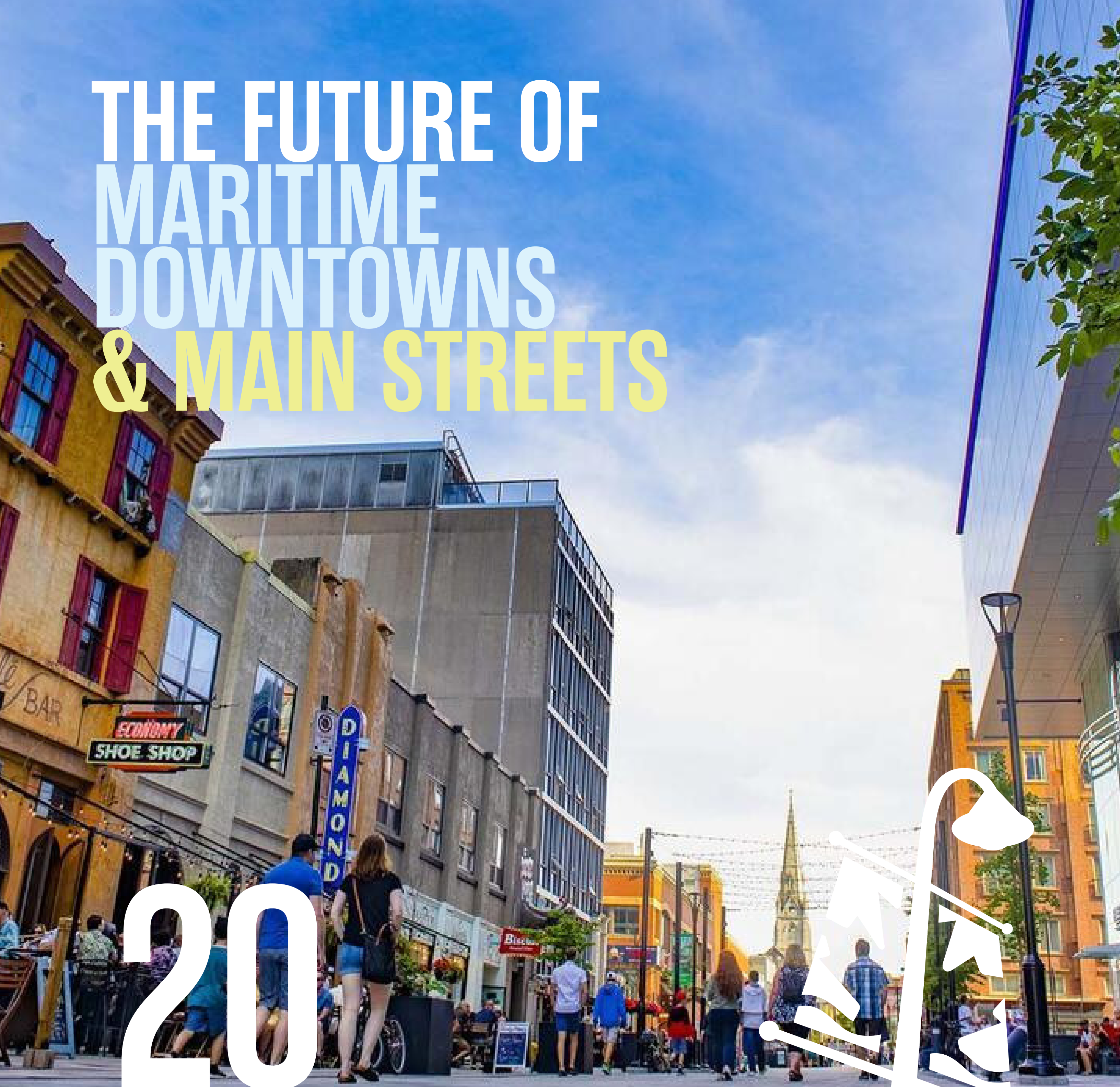
THE FUTURE OF MARITIME DOWNTOWNS & MAIN STREETS



2023

DOWNTOWNS
CENTRES-VILLES
ATLANTIC CANADA ATLANTIQUE

A Regional Research Project of Downtowns Atlantic Canada 2023

In Partnership With:

DOWNTOWNS
CENTRES-VILLES
ATLANTIC CANADA ATLANTIQUE

New Nouveau Brunswick CANADA

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LAND ACKNOWLEDGEMENT

We acknowledge and appreciate that the lands which we occupy in the Maritimes have been inhabited by Indigenous peoples from the beginning. We are grateful to live, work, and enjoy the traditional unceded territory of the Wolastoqiyik (Maliseet) and Mi’kmaq peoples. This territory is covered by the “Treaties of Peace and Friendship” which Mi’kmaq, Wolastoqiyik (Maliseet), Penobscot, and Passamaquoddyand peoples first signed with the British Crown in 1725. The treaties did not deal with surrender of lands and resources, but in fact recognized aboriginal title and established the rules for what was to be an ongoing relationship between nations.

This recognition of the contributions and historic importance of Indigenous peoples must also be clearly and overtly connected to our collective commitment to make the promise and the challenge of Truth & Reconciliation real in our communities.

2023

EXECUTIVE SUMMARY

The following report provides the findings of research carried out earlier this year in concert with 15 downtown and main street business associations throughout the Maritime provinces. Seven of them were conducted with Business Improvement Areas [BIAs] in New Brunswick and Prince Edward Island and eight with Business Improvement Districts [BIDs] in Nova Scotia. As part of this, a business census was completed for over 4300 businesses, with 1700+ of those businesses completing a survey asking respondents to identify their greatest challenge and their business community's greatest opportunity to grow.

Top Five Challenges:

- **Staffing.** Keeping and attracting staff is proving to be the number one challenge for our business owners, confirming late 2022 reports from Stats Canada and the Atlantic Economic Council. PEI is having the greatest trouble, but the pressure is felt throughout the region.

- **Inflation,** Current Economic Conditions & Attitudes. It is extremely difficult to rebound from COVID with the cost of materials and services escalating to the extent they are. PEI is feeling this the most with 25% of respondents identifying these issues as a challenge.

- **Parking.** Be it supply, convenience, or cost, parking in downtowns & main streets is perceived to be a problem throughout the region. This is a localized issue which is best addressed by business associations in partnership with their municipalities.

- **Lack of Foot Traffic,** Online Shopping & Competitive Environment. COVID brought about two significant disruptions to downtown and main street life: a dramatic change in the place of work for office employees and a marked increase in online shopping.

- **Security/Street Issues.** Homelessness, addictions, and mental health are playing out in the downtowns and on the main streets of our communities with increasing frequency. The creation of collaborative solutions must be a much higher priority for government, service agencies, and business.

Top Five Opportunities:

- **District Mix.** A high percentage of respondents from NB – 28% – cited this as an excellent opportunity for addressing the temptation of the 24/7 online shopping option. Many consumers remain dedicated to shopping local, so give them more selection of goods & services.

- **Parking.** A challenge and an opportunity. To thrive as a business district, respondents felt that more flexible parking opportunities and more convenient transportation links must be provided for the consumer to access their downtown or main street more easily.

- **Marketing Support.** Some businesses do exceptional marketing, but our respondents are looking for even more logistical and financial support, over and above the already excellent work which business associations do for their districts. Let's promote taking a stroll!

- **Events.** Downtowns and main streets are renowned for their festivals and events, so much so that respondents would love to add more events, activities, sales, and festivals to strengthen the appeal of shopping and relaxing downtown.

- **Increase Foot Traffic & Shop Local.** Supporting local is not only important for individual businesses, but it is critical to any community's economic and social well-being. Businesses and municipalities must work more closely together to accentuate the positive of local!

Please continue to read on to learn more and discover some suggestions of how we address theses issues and capitalize on these opportunities.

INTRODUCTION

Downtowns and main streets are the persona of any community. They portray the character of that community, exuding its joy and reflecting its relative health and well-being. They generally contain the largest concentration of employment within a community, a community's largest investment in infrastructure, an array of retail stores, restaurants & bars, and services, provide the venue(s) for most community events and festivals, and are the natural place for residents & visitors to relax and enjoy their/that community. Their continued vitality and vibrancy is key to the healthy dynamic of all communities.

These past pandemic years have had an impact on how our downtowns and main streets and their businesses function and are perceived. This is why Downtowns Atlantic Canada, with its partners Downtown New Brunswick & the International Downtown Association – Canada, and fifteen business improvement associations throughout the Maritimes embarked on a research project to learn more about their downtowns and main streets and what makes their businesses individually tick and collectively hum.

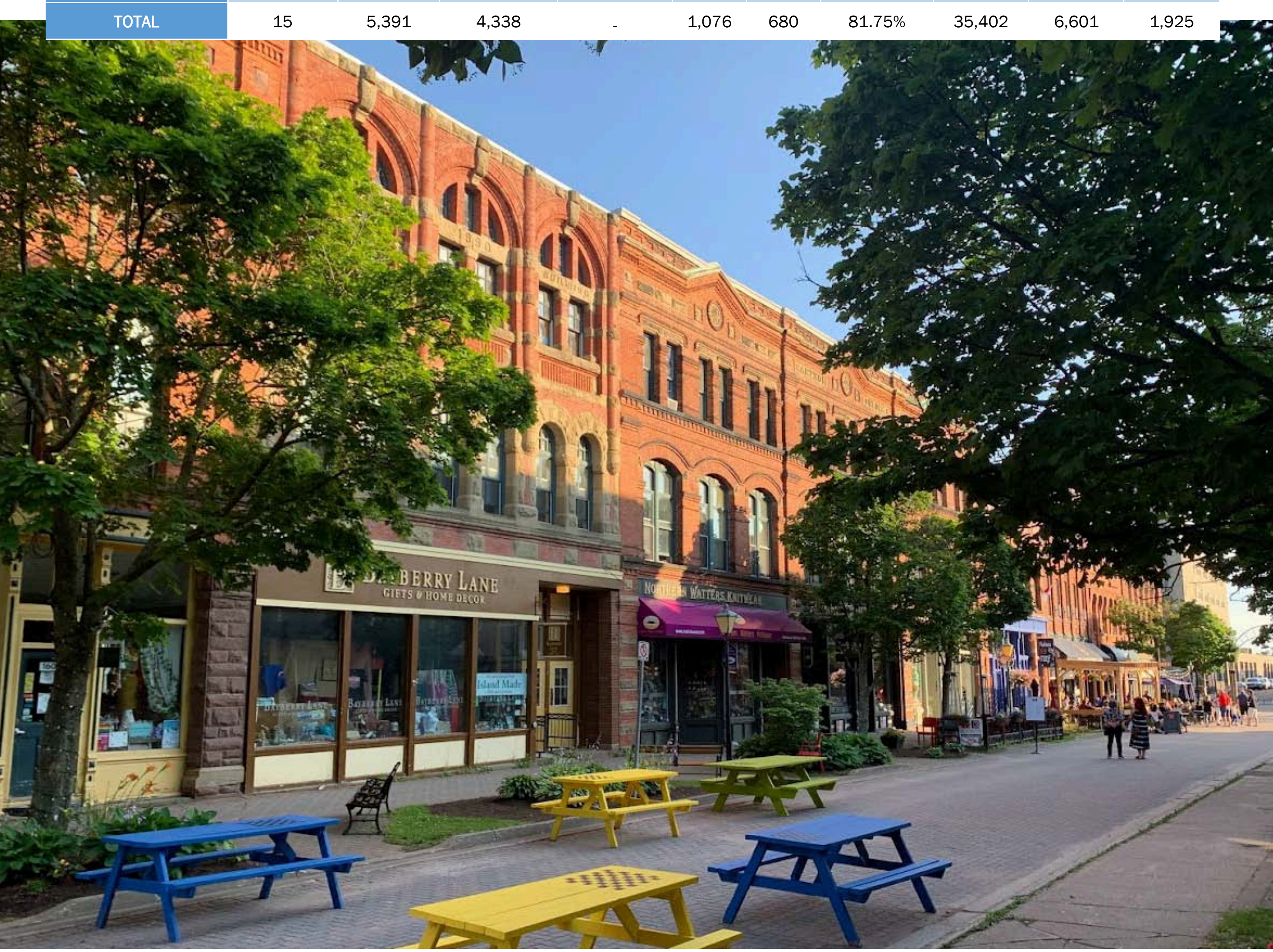
A snapshot of the 'building blocks' of the successes, the challenges and the opportunities, and the very nature of downtowns across the Maritimes are contained in the following pages – the nature of businesses [type, ownership, years in business], the number of employees, and the challenges as well as perceived opportunities as reported by business owners/ managers. Conclusions drawn from this information point us in the direction of policies and actions which we hope will acted on by business associations and their many government and private-sector partners!

This work would not have been possible had it not been for the hard work of the staff of each participating organization and the generous financial support of the Atlantic Canada Opportunities Agency [ACOA], the Regional Development Corporation of the Province of New Brunswick, the Province of Nova Scotia, the City of Charlottetown, and Cape Breton University.

Downtowns Centre-villes Atlantic Canada Atlantique is a collaborative group of thirty+ business improvement associations focused on strengthening downtowns and main streets as the unique, diverse, vibrant, and economically healthy cores of our communities.

THE MARITIMES – AT A GLANCE

Province	Participating Districts	Businesses in Study Areas	Businesses which participated	Percentage of commercial units vacant:	Places to shop	Places to Eat & Drink	Locally-owned Businesses in Study Areas:	Full-time Staff Reported	Part-Time Staff Reported	Seasonal Staff reported:
New Brunswick	5	1,643	1,440	10.8%	357	199	83.3%	12, 592	2,108	874
Nova Scotia	8	3,018	2,156	9.2%	578	377	78.3%	15,940	3,961	371
Prince Edward Island	2	742	742	4.9%	141	104	88.5%	6,870	562	680
TOTAL	15	5,391	4,338	-	1,076	680	81.75%	35,402	6,601	1,925

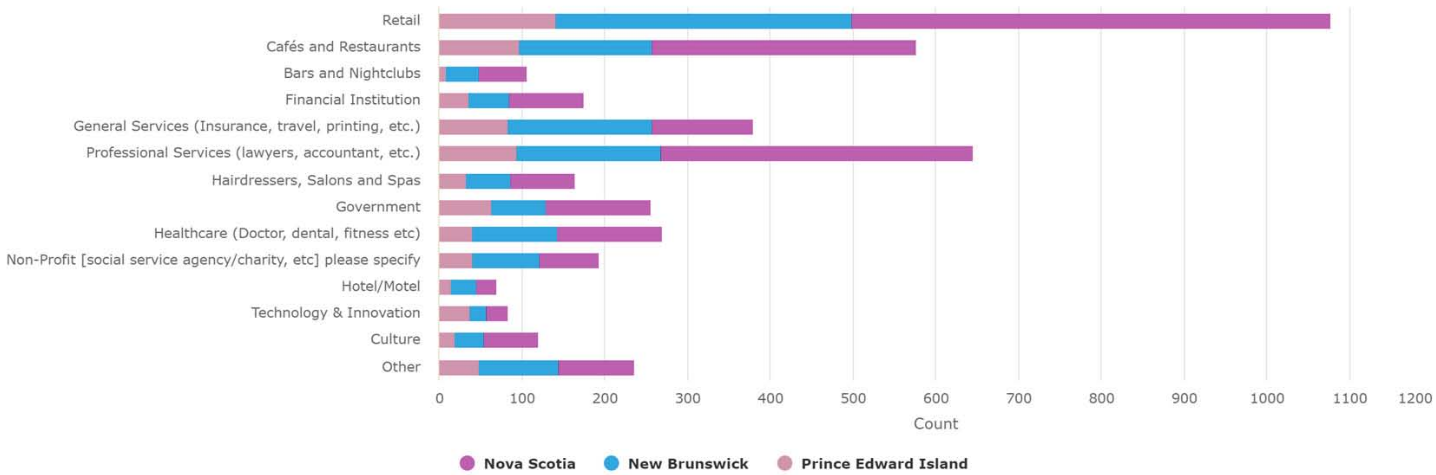


SHOPPING & SERVICES

COVID dramatically impacted people's shopping patterns. Online shopping has become the new 'go-to' for shopping and services. This means that there is presently less demand for products in bricks and mortar businesses and as a result, a lot fewer dollars being spent – and remaining! – within our communities. In February of this year, Statistics Canada reported that the share of e-commerce sales from February 2020 to July 2022 increased 68%! This is quite a bit more than the 47% increase [$27 billion] in the previous period between 2018 and 2020.

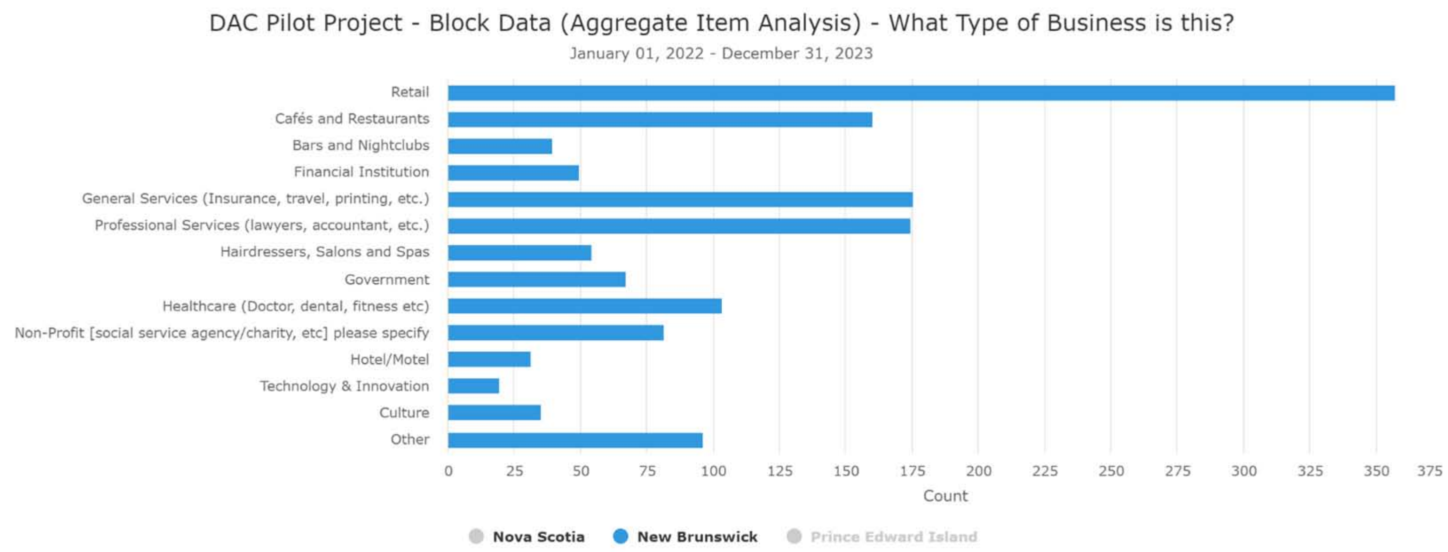
This cannot be taken lightly as it affects the entire economic cycle of a community. Acknowledged authorities on the subject cite that for every dollar spent at locally-owned businesses, anywhere from 48 - 63 cents will remain within the local economy. If that same dollar was spent in a regionally-owned business, a nationally-owned business, or an internationally-owned business, the monies remaining in your community drop proportionate to the distance from business location to ownership headquarters. Online shopping leaves mere cents in a community.

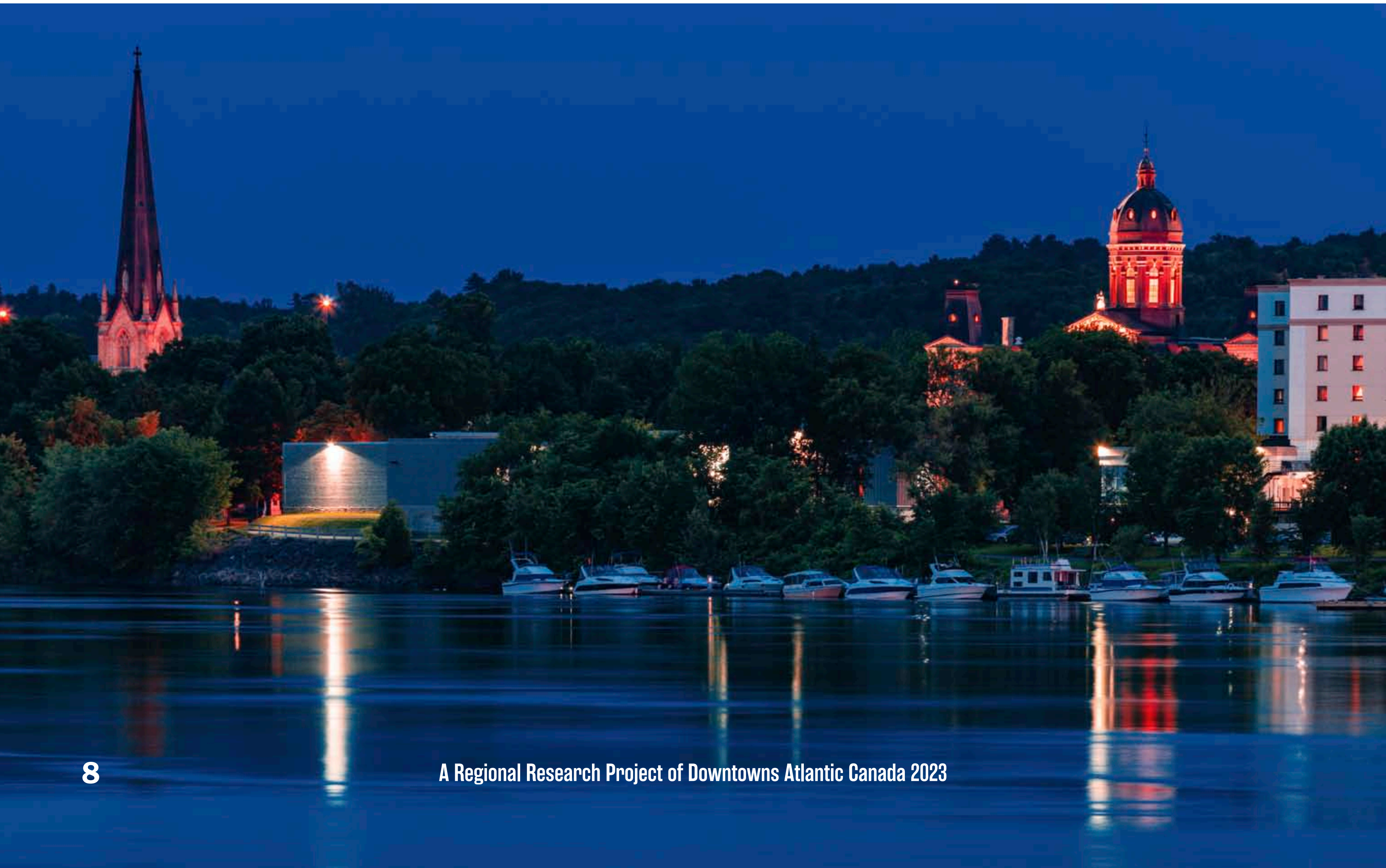
DOWNTOWN BUSINESS MIX – MARITIMES



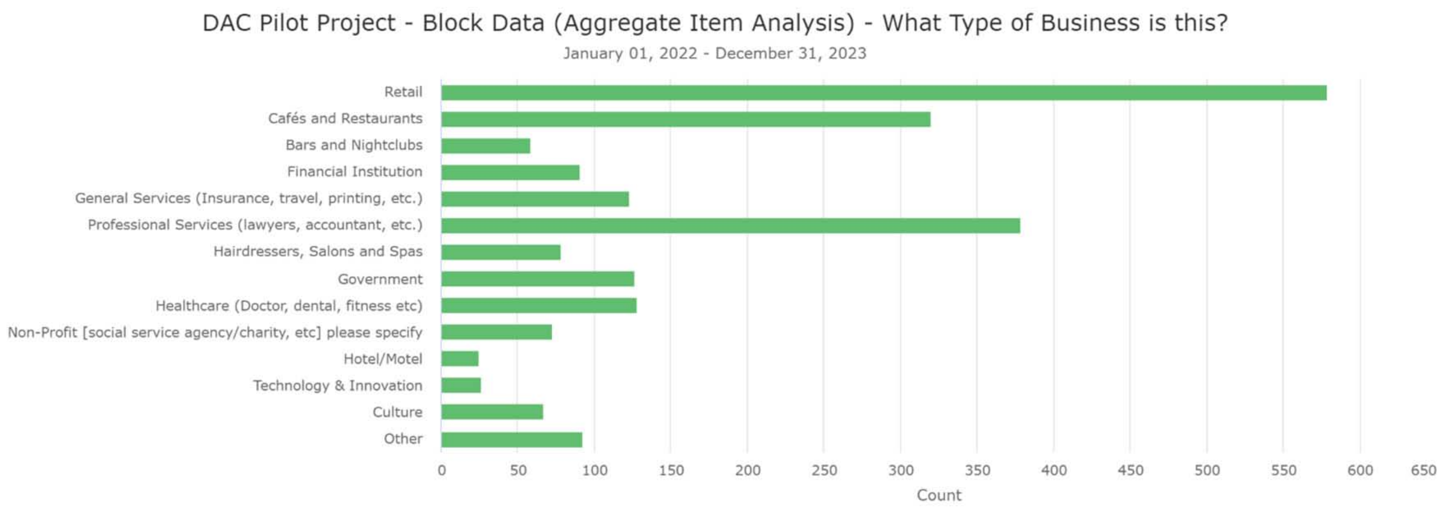
Type of Business	New Brunswick	Nova Scotia	Prince Edward Island	TOTAL
Retail Stores	357	578	141	1,076
Café & Restaurant	160	319	96	575
Maximum Seating Capacity	6,452	12,626	4,175	23,253
Bars & Nightclubs	39	58	8	105
Financial Institutions	49	90	35	174
General Services	175	122	82	379
Professional Services	174	378	93	645
Hairdressers, Salons & Spas	54	78	32	164
Government Offices	67	126	62	255
Federal	25	40	22	87
Provincial	36	66	36	138
Municipal	6	18	4	28
Healthcare Services	103	127	39	269
Non-Profits	81	72	39	192
Technology & Innovation	19	26	37	82
Culture	35	66	18	119
Hotels & Motels	-	24	13	37
Other	96	92	47	235
Total	1,476	2,208	804	4,488

DOWNTOWN BUSINESS MIX – NEW BRUNSWICK

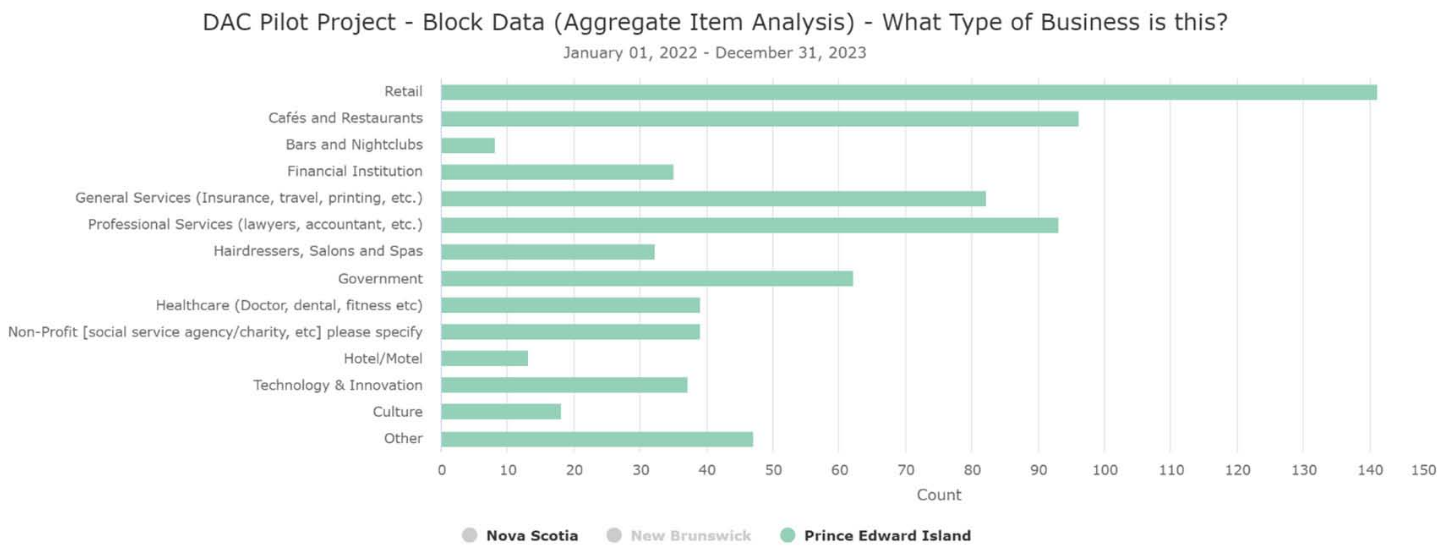




DOWNTOWN BUSINESS MIX – NOVA SCOTIA



DOWNTOWN BUSINESS MIX – PRINCE EDWARD ISLAND

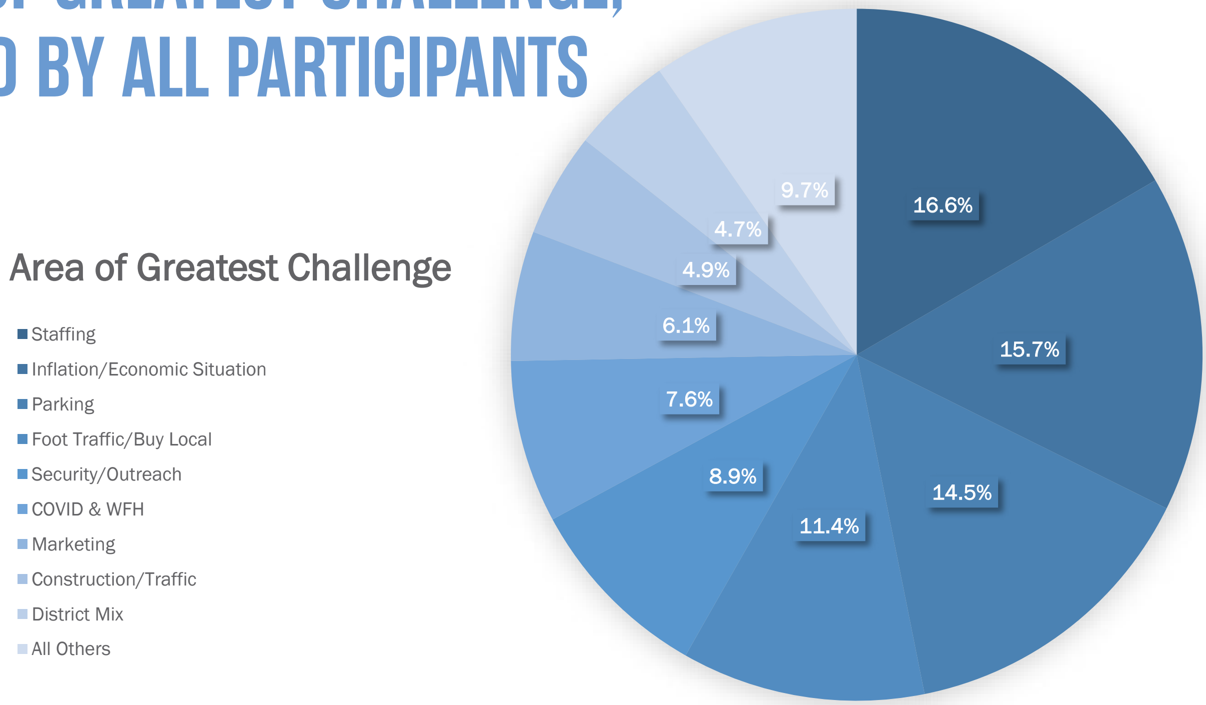


GREATEST CHALLENGES FOR RESPONDENTS

Atlantic Canada's downtowns and main streets, and the businesses which comprise them, have always been on the front lines of change, but never more than now.

Buffeted by COVID, challenged by online shopping, and in the case of some of our larger downtowns, confronted by changing work patterns, our downtowns and main streets must assess where they are and what their future will be. An integral part of this re-assessment is learning more directly from the businesses which comprise our downtowns and main streets. The following provides a summary of those issues which challenge and confound our downtown and main street business owners. It is these issues which we as the managers and trustees of Atlantic downtowns and main streets must work together to address. We will not be able to do it alone. As with other challenges and opportunities, we have always looked to partners who have a shared interest in the vitality and vibrancy of our communities and once again, we shall be reaching out to confer with these organizations, agencies, and levels of government. Following the summary below, we have identified what steps we believe will be necessary to properly address the first five and most important challenges.

AREA(S) OF GREATEST CHALLENGE, AS VOICED BY ALL PARTICIPANTS



		TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
#	Challenge	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
1	Staffing	290	17%	133	18.5%	122	14.3%	35	20.0%
2	Inflation & Prevailing Economic Conditions	275	16%	91	12.7%	148	17.3%	44	25.1%
3	Parking	254	15%	113	15.7%	122	14.3%	19	10.9%
4	Foot Traffic [lack of]/ Online shopping/ competitive environment	199	12%	74	10.3%	87	10.2%	38	21.7%
5	Security & Social Outreach	155	9%	116	16.2%	38	4.4%	1	0.6%
6	COVID & consequences	133	8%	74	10.3%	53	6.2%	6	3.4%
7	Marketing [lack of]	106	6%	37	5.2%	65	7.6%	4	2.3%
8	District Mix [lack of]	82	5%	43	6.0%	30	3.5%	9	5.1%
9	Government Advocacy [lack of]	44	2.5%	3	0.4%	29	3.4%	12	6.9%
10	Funding/Income [lack of]	42	2.3%	0	0.0%	42	4.9%	0	0.0%
11	Construction/Traffic	85	2.3%	21	2.9%	57	6.7%	2	1.1%
12	Seasonal Inconsistencies	42	2.3%	0	0.0%	42	4.9%	0	0.0%
13	Additional Categories: Other: 21, Direct Business Support: 10, Beautification: 5, All Good: 3 and Networking [lack of]: 2	41	2.6%	13	1.8%	20	2.3	8	4.6%
	TOTAL:	1,748	100%	718	100%	855	100%	175	100%

1. Staffing.

COVID forced certain parts of Canada's workforce to re-evaluate their employment situation and the options they had in having gainful work. Most chose to remain in their jobs, but enough chose to set out in new directions – be it going back to school or trying a new type of job – that many of our downtown and main street retailers and services are having trouble keeping and attracting new staff. This has involved increasing pay levels and creating new work schedules, sometimes involving owners in staffing roles, even more than in recent past.

Our research supports and bears out two other established perspectives on employment. Statistics Canada shared in its December 22, 2022 report, that 'more than three in five businesses reported that this was more of a challenge than it was 12 months ago'. They went on to say that 'on average, prices have been rising faster than wages. Meanwhile, the demand for goods and services is stronger than the ability for businesses to supply them. In October average hourly wages rose 5.6% on a year-over-year basis, while the Consumer Price Index rose by 6.9%'. The Atlantic Economic Council concurred in it's December 2022 report in which they said that 'lower-paying and seasonal industries' such as accommodations and restaurants are well above the industry average of 5.6% in the second quarter of 2022. 'Accommodations and food have the highest rate of job vacancies in the region at 14%'.

As this new equilibrium of balancing supply and demand of labour is found, our businesses will continue to seek new employees, sometimes in concert with their business associations, but will do it in rhythm with changing conditions. We believe there is value in our provincial governments collaborating with business associations and community colleges & universities to foster a stronger culture of entrepreneurship through sector-specific training programs and micro loans at reduced rates. The opportunity could also be created to partner with business associations and property owners to create retail innovation incubation centres in downtowns and on main streets.

Recommended Response: *We recommend increased collaboration amongst provinces, higher levels of learning, and business associations in defining curricula which will help foster increased entrepreneurship within downtowns and main streets. But we also recommend some brain storming within and amongst our business improvement associations about what strategies might be created with partners within a community and what might be done at a more regional level.*

2. Inflation and current economic conditions and attitudes.

Businesses are reporting that it is extremely difficult to rebound from COVID with the cost of materials and services escalating to the extent they are. This is further compounded by changed work environments and changed and evolving public attitudes.

There is unquestionably a resurgence of confidence within the Canadian public as we seem to be leaving COVID behind. However, with reports of resurgence, we may well be faced with lifestyles and routines will be upset, including going back to places of work and shopping & relaxing in the core of our communities. This has led to what might be described as a transformational point in the life of downtowns and main streets. The need for big footprints of office space is being assessed by larger corporations and there is already shrinkage in demand for commercial space, both in upper and ground floors. It is the latter – our ground floor spaces – which exude the personality, charm, and appeal of a downtown or main streets, but it is collectively all businesses which will shape the very future of a downtown or main street.

We believe it is valuable for municipalities and their community-building partners to work with their provincial governments to learn more about the economic, physical, and social influences which are presently changing and shaping their communities.

Targeted provincial and federal programs and the development of closer working relationships have been effective in assisting recovery of individual businesses and our commercial cores, but we should now focus on formalizing these working relationships and continue to work on developing policies and programs designed to provide optimal results.

Recommended Response: *We recommend our elected representatives, but in particular our premiers, recognize downtowns and main streets as 'critical to the essence of community' and convene a summit of provincial governments, municipalities, community and business associations to facilitate a new vision for the cores of our communities as catalysts for community health and prosperity.*

3. Parking.

'Parking' in downtowns and on main streets has always been a certain impediment to attracting the masses. Be it supply, convenience, or cost, parking is seen as a problem. But it is a challenge which has been addressed creatively and collaboratively by many business associations and their municipalities here in our region and across the country. Decades ago, Downtown Fredericton introduced The Meter Fairy who would flit throughout downtown plugging meters when they were expired. It was an imaginative and successful program which was picked up by other business associations across the country. In May of this year, Halifax Regional Municipality increased parking fees by 25%, but in doing so committed to provide grants to non-profit and community organizations of $5000 to $25,000 with the increased budget. They also kept parking free on Saturdays. In Calgary, Alberta, the business associations worked with the City to have net parking revenues shared in all business districts which have parking meters or parkades. Fifty percent of any surplus is shared proportionally with each business district association, based on revenue received. The monies can be used by the associations for infrastructure and service improvements. As of May last year, $3.3 million in funding was available.

Recommended Response: *We recommend that i) business associations having members who are concerned about parking create a short-term parking task force to identify the specifics of the problem and ii) for the association to open discussions with their municipality to explore what can be done as a partnership to enhance the public's parking experience.*

4. Lack of Foot Traffic & Reduced traffic flow/Online Shopping/ Competitive Environment.

What our businesses identify as 'foot traffic' and 'reduced traffic flow' reflects two significant disruptions to downtown and main street life: changed place of office work and increased online shopping. COVID saw downtown and main street office staff go home and stay at home for a long period of time. The impacts of this were much more significant in large downtowns [in the spring of 2022, the Business District in Downtown Toronto had only 3% of its workforce in their offices!], but still significant in every size of community as COVID required us all to try to work in 'safe' work environments! This remains an on-going discussion, but it will undeniably change the demand for space in downtowns and main streets.

COVID has dramatically impacted Canadian's shopping patterns. When faced with a crisis like COVID, many consumers would look to 'retail therapy' to provide relief! What better remedy than flipping through the racks and looking for something new? Alas, that was not an option during COVID and Canadians became a lot more accustomed to shopping online. This trend is something which we believe warrants to attention of our elected representatives at a local and provincial level.

Online shopping has become the new 'go-to' for shopping and services as reflected in our research and supported by Statistics Canada. This means that there is presently less demand for products in bricks and mortar businesses and as a result, fewer dollars being spent – and remaining! – within our communities. In February of this year, Statistics Canada reported that the share of e-commerce sales from February 2020 to July 2022 increased 67.9%! In November 2021, Statistics Canada reported that online shopping had increased $27 billion or 47% between 2018 and 2020. This cannot be taken lightly as it affects the entire economic cycle of a community. Acknowledged authorities on the subject cite that for every dollar spent at locally-owned businesses, anywhere from 48 to 63 cents remains within the local economy. Online shopping leaves mere cents in a community.

We applaud programs which are helping to digitize store-front businesses, but believe much more must be done to examine this challenge in the context of the community reinvestment loop.

Recommended Response: *We recommend that Downtowns Atlantic Canada initiate discussions with Statistics Canada and the Atlantic Premiers Economic Council to explore if further research might be conducted about changing shopping patterns and the impacts on communities. We also recommend that this topic be included as part of a regional downtown summit.*

5. [Perceived] Security/Street Issues.

Homelessness, addictions, and mental health are playing out in the downtowns and on the main streets of our communities with increasing frequency. The creation of collaborative solutions must be a much higher priority for government, service agencies, and business. Packaged together as what might be called ‘street issues’, they create a social stigma for our downtowns and main streets and are becoming an impediment to commerce and continued vibrancy of our downtowns and main streets. While individual communities have held meetings to discuss the subject, it is a matter which extends to so many communities that we believe there is merit in convening a regional conference to discuss this issue and explore best practices in this field.

Recommended Response: *We recommend our premiers add their voices to other premiers across the country in asking the federal government to play a stronger leadership role in developing and strengthening initiatives focused on addressing street-related issues. We urge the creation of a task force focused on creating co-ordinated strategies for addressing the opioid crisis and associated mental health challenges and providing complex care for those in extreme state of need. Given the experience which our BID/BIA colleagues have had in helping to address these matters [e.g. Street Navigators in HRM], Downtowns Atlantic Canada would be most willing to actively work toward the creation and participate on such a task force.*

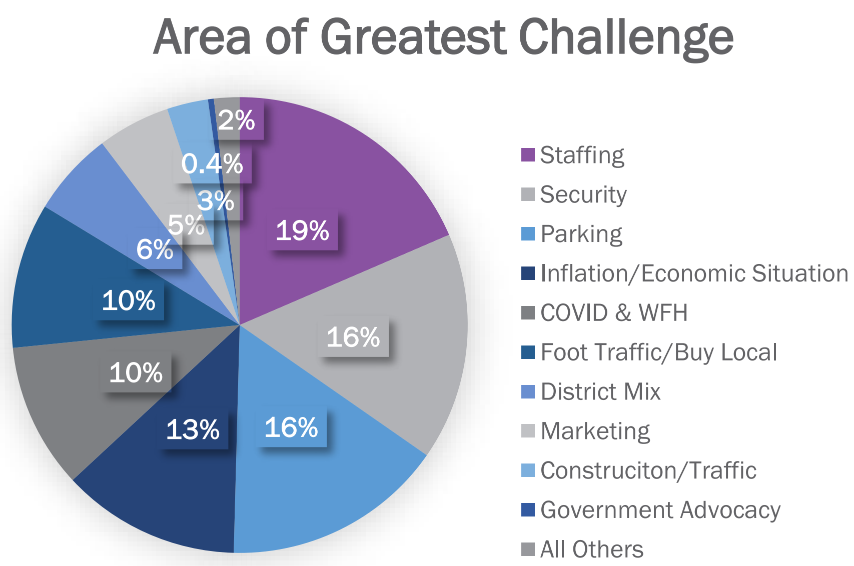
Conclusion about Challenges:

Historically, change in our communities came about in gradual stages, but today, change is all around us. Our social, physical, economic, emotional and spiritual environments are quickly and radically shifting. Our means of communicating and relating with each other, conducting business, and carrying out politics has been transformed and not all to the good. Downtowns Atlantic Canada and its members stand prepared to act now to utilize our intellectual and financial resources to effect positive change in our region. We have the means to facilitate, collaborate, and build partnerships in communities throughout the region. *Please call on us to work with you!*

AREA(S) OF GREATEST CHALLENGE, AS VOICED BY RESPONDENTS – NEW BRUNSWICK

All Challenges:

Challenge Name	Count	% of Total Feedback
Staffing	133	18.5%
Security	116	16.2%
Parking	113	15.7%
Inflation/Economic Situation	91	12.7%
COVID & WFH	74	10.3%
Foot Traffic/Buy Local	74	10.3%
District Mix	43	6.0%
Marketing	37	5.2%
Construction/Traffic	21	2.9%
Government Advocacy	3	0.4%
All Others	13	2%



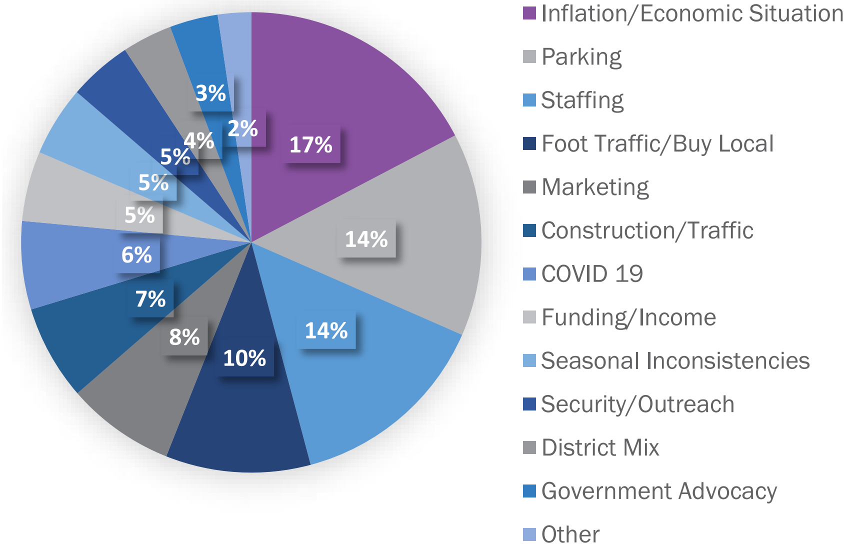
AREA(S) OF GREATEST CHALLENGE, AS VOICED BY RESPONDENTS – NOVA SCOTIA:

2023

All Challenges:

Challenge Name	Count	% of Total Feedback
Inflation/Economic Situation	148	17.3%
Parking	122	14.3%
Staffing	122	14.3%
Foot Traffic/Buy Local	87	10.2%
Marketing	65	7.6%
Construction/Traffic	57	6.7%
COVID 19	53	6.2%
Funding/Income	42	4.9%
Seasonal Inconsistencies	42	4.9%
Security/Outreach	38	4.4%
District Mix	30	3.5%
Government Advocacy	29	3.4%
Other	20	2.3%

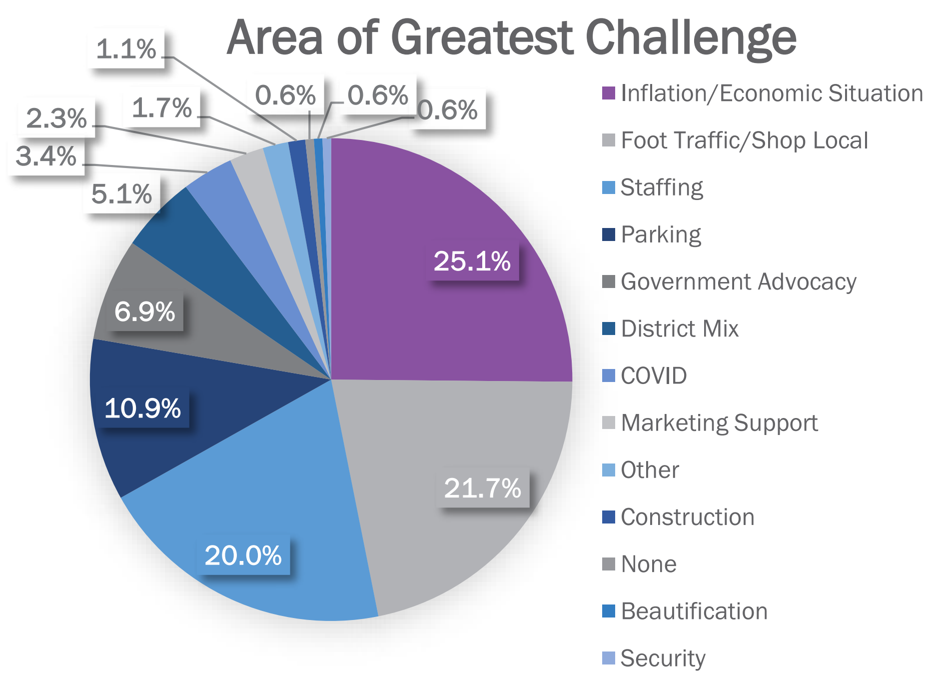
Area of Greatest Challenge



AREA(S) OF GREATEST CHALLENGE, AS VOICED BY RESPONDENTS – PRINCE EDWARD ISLAND

All Challenges:

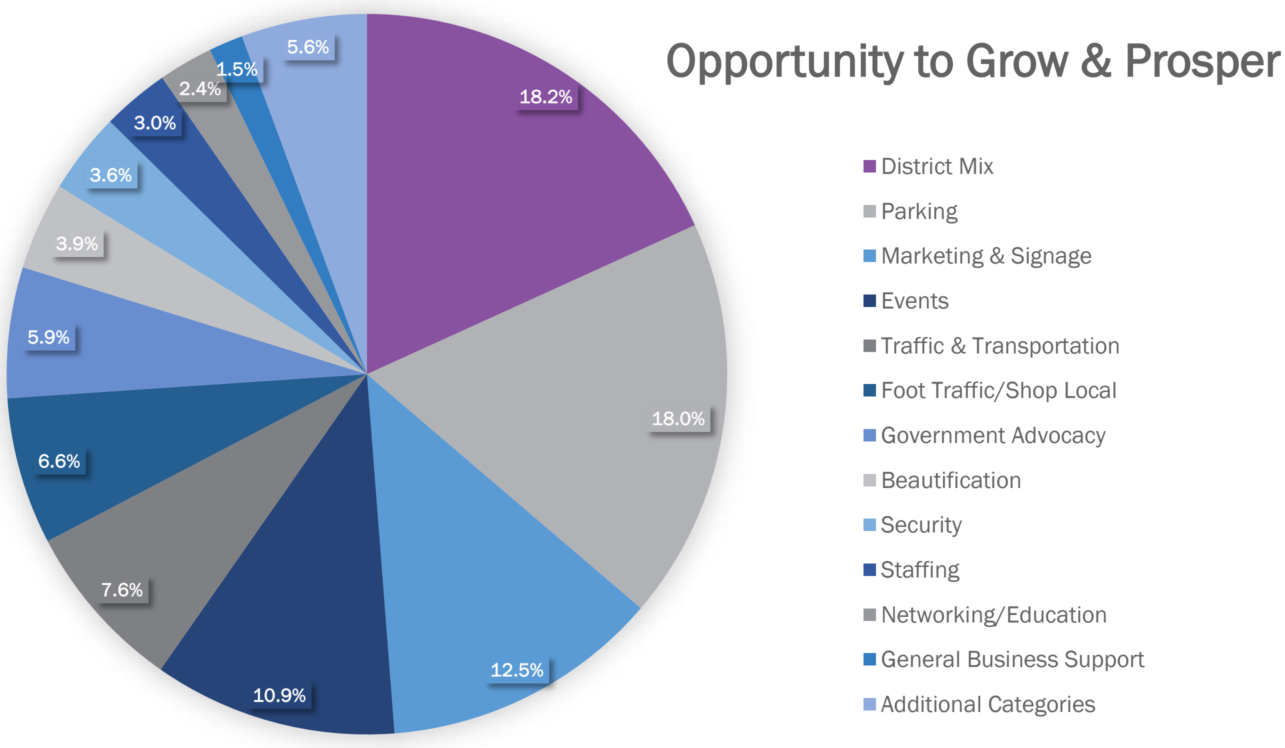
Challenge Name	Count	% of Total Feedback
Inflation/Economic Situation	44	25.1%
Foot Traffic/Shop Local	38	21.7%
Staffing	35	20.0%
Parking	19	10.9%
Government Advocacy	12	6.9%
District Mix	9	5.1%
COVID	6	3.4%
Marketing Support	4	2.3%
Other	3	1.7%
Construction	2	1.1%
None	1	0.6%
Beautification	1	0.6%
Security	1	0.6%



GREATEST OPPORTUNITY TO GROW AS VOICED BY ALL RESPONDENTS

Strategic Planners often observe that there are some elements within a SWOT analysis that could be a positive as well as a negative and this research bears that out! Both Parking and Foot Traffic/Shop Local are seen as challenges, but also opportunities. Each can be approached with a similar solution structure: consult, engage partners, discuss, identify options, and act. The following Opportunities do not as much as Challenges require the engagement of senior levels of government as they do our members, each other as BIA/BID colleagues, and our communities.

GREATEST OPPORTUNITY TO GROW AS VOICED BY ALL RESPONDENTS



		TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
#	Opportunity	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
1	District Mix	320	18.2%	185	28.2%	121	12.5%	14	10.5%
2	Parking	317	18.0%	86	13.1%	206	21.3%	25	18.8%
3	Marketing & Signage	220	12.5%	82	12.5%	116	12.0%	22	16.5%
4	Events	192	10.9%	84	12.8%	91	9.4%	17	12.8%
5	Traffic & Transportation	134	7.6%	13	2.0%	117	12.1%	4	3.0%
6	Foot Traffic/Shop Local	116	6.6%	37	5.6%	67	6.9%	12	9.0%
7	Government Advocacy	103	5.9%	45	6.8%	44	4.6%	14	10.5%
8	Beautification	69	3.9%	29	4.4%	34	3.5%	6	4.5%
9	Security	64	3.6%	0	0.0%	59	6.1%	5	3.8%
10	Staffing	53	3.0%	46	7.0%	5	0.5%	2	1.5%
11	Networking/Education	43	2.4%	23	3.5%	18	1.9%	2	1.5%
12	General Business Support	27	1.5%	7	1.1%	18	1.9%	2	1.5%
13	Additional Categories: Other: 53, Operational Support: 26 All Good: 17 and Bilingual Marketing/Support: 3	99	5.6%	20	3.0%	71	7.3%	8	6.0%
	TOTAL:	1,757	100%	657	100%	967	100%	133	100%

1. District Mix.

When the cornucopia of goods and services of the internet is available to all consumers 24-7, its tough to compete. But there are many consumers who remain dedicated to their local businesses and a business association strengthening the ‘district mix’ is definitely a strategy for making the downtown/main street a more appealing destination. One of the first steps is ensuring your business association has a profile of what current uses occupy spaces within the district, complemented by a comprehensive inventory of what space is available for rent. Convene a meeting and brainstorm what uses would complement the current make-up of your businesses. Identify what lies in the opportunity gap and work with your property owners and realtors to find the businesses which will fit.

In the early 2000s, Downtown Moncton developed a program of working with local realtors to list commercial spaces on their website as well as provide distinctive signage in the windows of available space. Other business organizations have been refining the process of identifying such opportunities with BizMap perhaps being the best example. In 2017, the City of Vancouver partnered with its BIAs and Small Business BC to create BizMap, a public, online, map-based platform featuring comparative data on BIA districts and their market areas. Some day, this may be achieved in Atlantic Canada.

Recommended Response: *Downtowns Atlantic Canada is willing to place the opportunity of District Mix and how it can be achieved in its strategic planning considerations for the coming year. We could initiate a brain-storming meeting of interested members to allow for a thorough discussion of strategies which might be employed to strengthen the mix of businesses within particular business districts and who might be interested in working together on this opportunity.*

2. Parking.

York University Professor James McKellar describes the car as ‘an incredible consumer of land and the biggest contributor to congestion’. Yet, it has been a ‘necessary evil’ in the development of cities. Just when Canadian communities were seemingly getting a hold on that congestion through unprecedented investment in public transit, COVID struck and swept so many commuters off their buses, trams, and subways. We are now starting back where we began in some communities. As we work our way back to a greater reliance on public transit and alternate transportation, an opportunity for being creative in how we accommodate and welcome cars to our downtowns and main streets.

Recommended Response: *We repeat the previous recommendation within the Challenges section, that business associations having members who are concerned about parking i) create a short-term parking task force to identify the specifics of the problem and ii) for the association to open discussions with their municipality to explore what can be done as a partnership to enhance the public’s parking experience. For its part, Downtowns Atlantic Canada will compile a series of best practices from across Canada related to making parking more appealing and share that with its members.*

3. Marketing Support.

Many of our business associations in Atlantic Canada use social media for the benefit of their members very effectively. They systematically profile individual businesses to welcome them when just opening, when celebrating a particular benchmark date, or as part of a special event. They provide overall marketing for the district and are very effective in working with their municipality to provide public service announcements. The 'marketing support' identified by businesses in our research is very much the above and then a bit more. It goes all the way to packaging and promoting a street, a precinct [within a larger downtown], or the downtown or main street itself. When Downtown Victoria was faced with mounting street issues and an associated decreasing consumer confidence in the downtown as a destination, a marketing program was created in which a grant was provided to any collection of blocks within the downtown which wished to market themselves as an entity within the downtown. Distinctive branding was created, programs developed, and a re-energized downtown began attracting more business to its stores.

Recommended Response: *Downtowns Atlantic Canada initiate a marketing forum amongst members to ensure best practices are shared and new ideas developed. We also suggest as part of this process, that business associations are provided with the opportunity of discussing & assessing their current marketing programs amongst their peers.*

4. Events.

Events have always been a 'two-edged sword' for the businesses of a business district. The events which might first spring to mind for some readers are those big events which attract lots of people, reinforce the identity of the downtown or main street as an exciting destination, and always do well for food & hospitality, but not always for the retailers. On the flip side, some of our colleagues have created lower profile, business-oriented events which really serve and build the businesses. Excellent examples of this are the North End's Taking BLK Gottingen initiative, or the Halifax Mural Festival focused on Quinpool Road, or Downtown Charlottetown's Sunday morning market. All attract residents and visitors for a more relaxed visit to those locales. Be they big or small events, it is important that the allocation of the limited resources of a business association are well-thought out and invested in a manner which will provide the greatest dividends to the district overall and to its individual businesses.

Recommended Response: *Downtowns Atlantic will place the topic of events on its agenda to be discussed as a possible subject of next year's AGM. We recommend that our partners, all levels of government, continue to providing funding to events and festivals.*

5. Foot Traffic/Shop Local.

Statistics Canada's reports about online shopping illustrate an alarming trend which should be a motivation for all to scrutinize how we might address this issue. Last year, the Toronto Area Business Improvement Association was discussing with its members and other partners the idea of asking City Council to pass legislation which could result in a levy tax of $1 per parcel delivered anywhere in Toronto. Nothing has happened yet, but it is an indication that others are concerned.

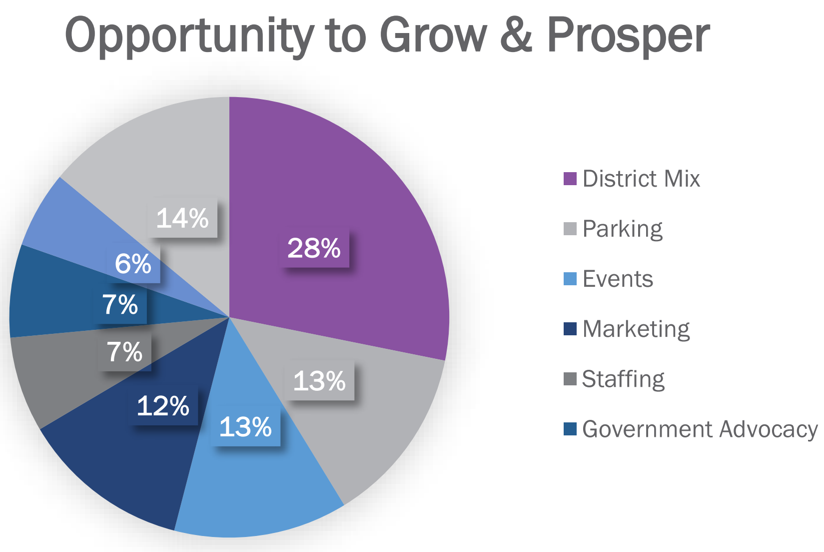
Recommended Response: *Downtowns Atlantic commits to begin discussions with municipal provincial umbrella organizations within our region to explore what research is being done to learn more about the impact of online shopping on businesses and the communities in which they work.*

Conclusion to Opportunities:

As we look at the Challenges and Opportunities identified by our businesses, there is one 'externality' which is not identified likely because of its enormity. With all of the irrefutable signs of global warming swarming around us, it will be key as we look to the future to ensure that sustainability is a factor which is woven into both Challenges and Opportunities. As we plan for the future, Downtowns Atlantic joins other Canadians in committing to factor in the impacts of our actions on this fragile earth of ours and to act accordingly!

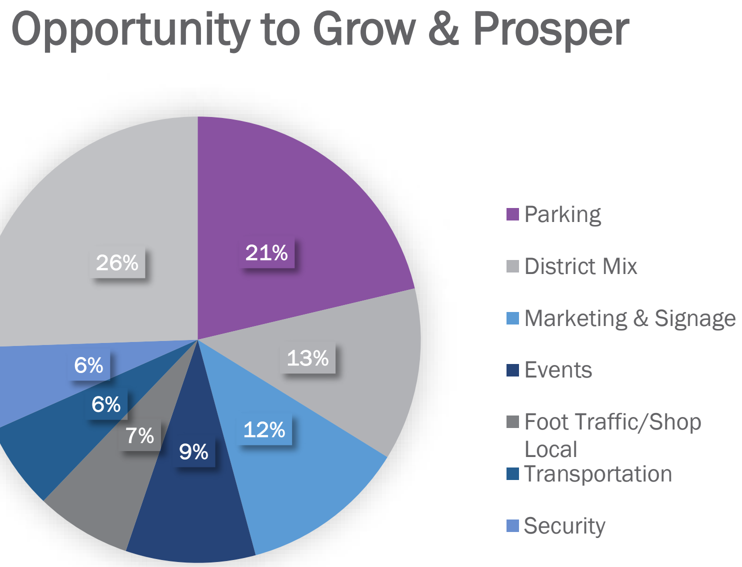
GREATEST OPPORTUNITY TO GROW AND PROSPER – NEW BRUNSWICK

Growth Opportunity	Count	% of Total Feedback
District Mix	185	28.1583%
Parking	86	13.0898%
Events	84	12.7854%
Marketing	82	12.4810%
Staffing	46	7.0015%
Government Advocacy	45	6.8493%
Foot Traffic/Focus Local	37	5.6317%
Beautification	29	4.4140%
Networking	23	3.5008%
Traffic	10	1.5221%
Other	9	1.3699%
Direct Business Support	7	1.0654%
Operations	5	0.7610%
Accessibility	3	0.4566%
All Good	3	0.4566%
Bilingual Marketing/Support	3	0.4566%



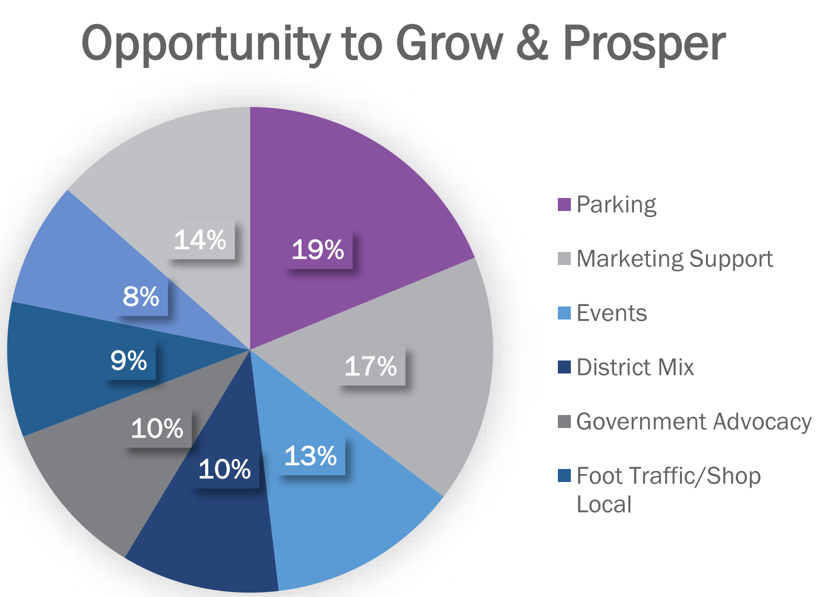
GREATEST OPPORTUNITY TO GROW AND PROSPER – NOVA SCOTIA:

Growth Opportunity	Count	% of Total Feedback
Parking	206	21.303%
District Mix	121	12.513%
Marketing & Signage	116	11.996%
Events	91	9.411%
Foot Traffic/Shop Local	67	6.929%
Transportation	60	6.205%
Security	59	6.101%
Government Advocacy	44	4.550%
Other	38	3.930%
Beautification	34	3.516%
Traffic	26	2.689%
Operations	21	2.172%
General Business Support	18	1.861%
Construction	18	1.861%
Networking/Education	18	1.861%
Pedestrian Focused Streets	13	1.344%
All Good / No changes needed	12	1.241%
Staffing	5	0.517%



GREATEST OPPORTUNITY TO GROW AND PROSPER – PRINCE EDWARD ISLAND

Growth Opportunity	Count	% of Total Feedback
Parking	25	18.80%
Marketing Support	22	16.54%
Events	17	12.78%
District Mix	14	10.53%
Government Advocacy	14	10.53%
Foot Traffic/Shop Local	12	9.02%
Other	6	4.51%
Beautification	6	4.51%
Security	5	3.76%
Transportation	4	3.01%
General Business Support	2	1.50%
Networking/Education	2	1.50%
Staffing	2	1.50%
All good	1	0.75%
None	1	0.75%



2023

Regional Employment Summary

	TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
Employment Breakdown	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
Number of Full Time Employees in Districts	35,402	80.59%	12,592	81.0%	15,940	78.63%	6,870	84.69%
Number of Part Time Employees in Districts	6,631	15.09%	2,108	13.55%	3,961	19.54%	562	6.93%
Number of Seasonal Employees in Districts	1,898	4.32%	847	5.45%	371	1.83%	680	8.38%
TOTAL:	43,931	100%	15,547	100%	20,272	100%	8,112	100%

Business Property Ownership/Renting Summary

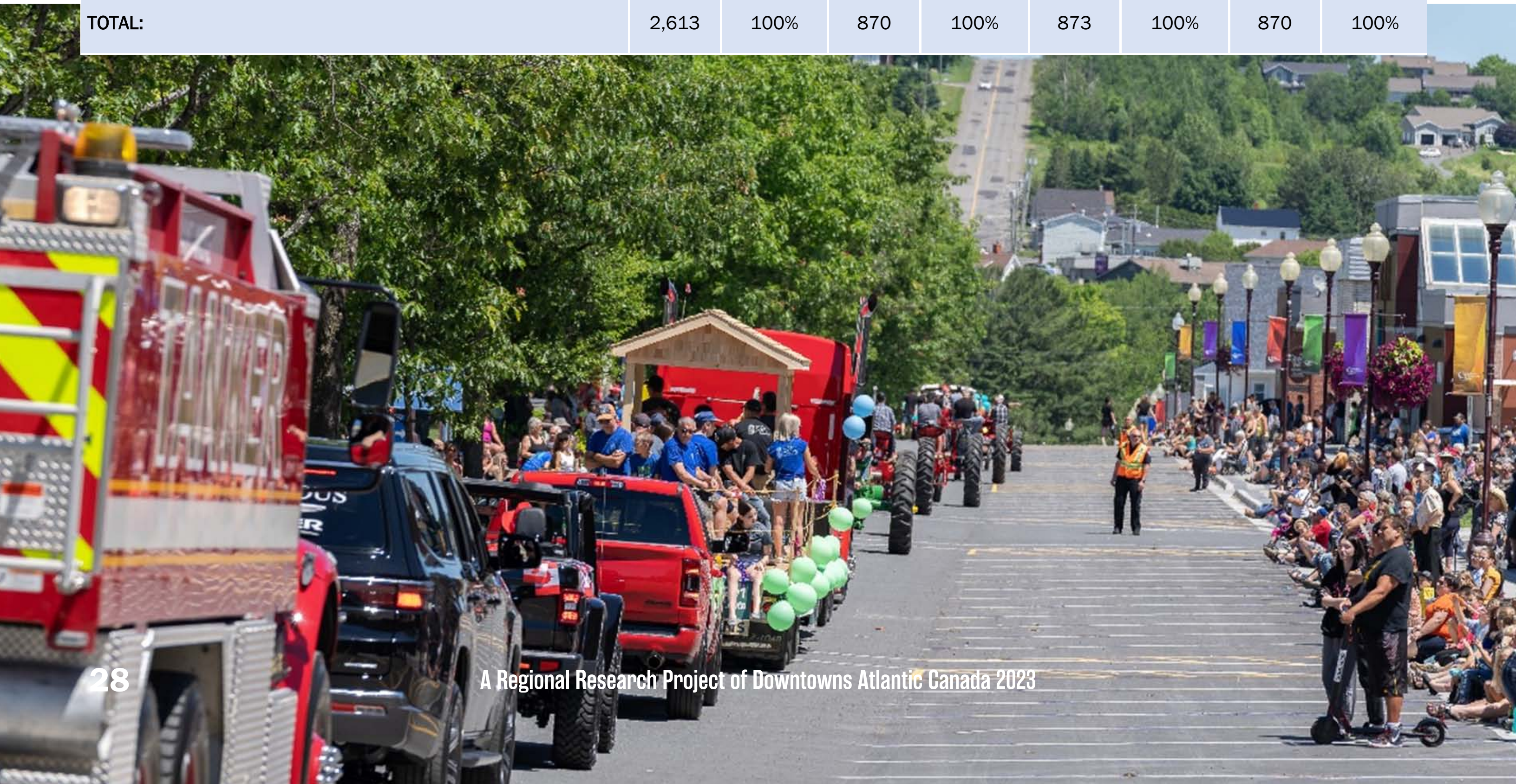
	TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
Commercial Ownership/Rental	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
Number Of Businesses that own the property they operate in	687	21.84%	329	30.21%	214	14.71%	144	23.96%
Number Of Businesses that own the property they operate in	2,458	78.16%	760	69.79%	1,241	85.29%	457	76.04%
TOTAL:	3,145	100%	1,089	100%	1,455	100%	601	100%

Commercial Ownership/Management by Gender

	TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
Commercial Ownership/Management by Gender	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
Owners/Managers who identified as male	1,063	39.55%	338	38.85%	387	40.82%	338	38.85%
Owners/Managers who identified as female	1,513	56.29%	496	57.01%	521	54.96%	496	57.01%
Owners/Managers who identified as non-binary/other	17	0.63%	3	0.34%	11	1.16%	3	0.34%
Owners/Managers who preferred not to answer	95	3.53%	33	3.79%	29	3.06%	33	3.79%
TOTAL:	2,688	100%	870	100%	948	100%	870	100%

Commercial Ownership/Management by Minority Status

	TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
Commercial Ownership/Management by Minority Status	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
Owners/Managers who identified as a minority	286	10.95%	76	8.74%	134	15.35%	76	8.74%
Owners/Managers who did not identify as a minority	2,214	84.73%	769	88.39%	676	77.43%	769	88.39%
Owners/Managers who preferred not to answer	113	4.32%	25	2.87%	63	7.22%	25	2.87%
TOTAL:	2,613	100%	870	100%	873	100%	870	100%

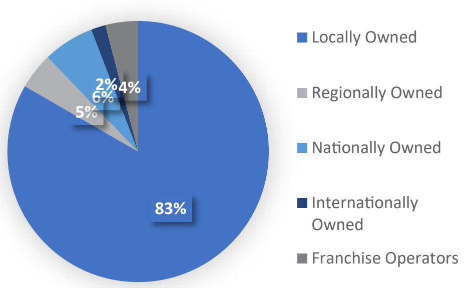


2023

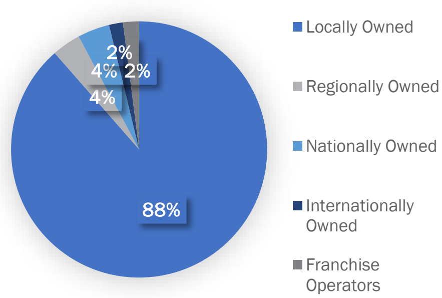
Commercial Units by Type of Ownership and Franchise Type

	TOTAL		New Brunswick		Nova Scotia		Prince Edward Island	
Commercial Units by Type of Ownership	Number	Percent	Number	Percentage	Number	Percentage	Number	Percentage
Locally Owned Businesses in District	3,545	81.72%	1,200	83.33%	1,688	78.29%	657	88.54%
Regionally Owned Businesses in District	144	3.32%	65	4.51%	52	2.41%	27	3.64%
Nationally Owned Businesses in District	329	7.58%	91	6.32%	208	9.65%	30	4.04%
Internationally Owned Businesses in District	151	3.48%	26	1.81%	112	5.19%	13	1.75%
Franchise Operated Business in District	169	3.90%	58	4.03%	96	4.45%	15	2.02%
TOTAL:	4,338	100%	1,440	100%	2,156	100%	742	100%

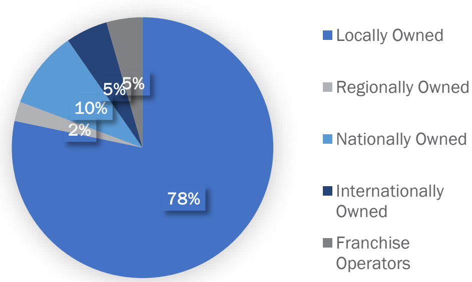
New Brunswick



Prince Edward Island



Nova Scotia



METHODOLOGY NOTES

APRI Disclaimer

This report is funded by the Atlantic Canada Opportunities Agency (ACOA) under the Atlantic Policy Research Initiative, which provides a vehicle for the analysis of key socioeconomic policy issues in Atlantic Canada. The views expressed in this study do not reflect the views of ACOA or of the Government of Canada. The authors are responsible for the accuracy, reliability and currency of the information.

Unless otherwise attributed, the data collected here was gathered by direct census of the businesses and property owners within the district boundaries of the amazing fifteen participating business associations:

NEW BRUNSWICK:

- Centre-ville Edmundston/Downtown Edmundston
- Centre-ville Grand Sault/Downtown Grand Falls
- Centre-ville Shediac/Downtown Shediac
- Downtown Moncton
- Downtown Saint John

NOVA SCOTIA:

- Downtown Dartmouth
- Downtown Halifax
- Downtown Sydney
- Downtown Windsor
- North End, Halifax
- Quinpool Road, Halifax
- Spring Garden Road, Halifax
- Village on Main, Dartmouth

PRINCE EDWARD ISLAND:

- Downtown Charlottetown
- Downtown Summerside

Participation by business owners, mangers and general business participants was entirely voluntary, and we would like to thank all the participants for their time and contribution to this data collection.

All percentages are of the total number of participants that responded to any particular question unless a 'did not disclose' percentage is explicitly given.

DOWNTOWNS
CENTRES-VILLES
ATLANTIC CANADA ATLANTIQUE

THE COLLECTIVE VOICE OF THE
DOWNTOWN BUSINESS IMPROVEMENT
AREAS OF ATLANTIC CANADA