

ROADMAP 2021

A Strategic Economic Plan For St. John's



NOTE TO READERS

This document has been updated to include Addendum A - a report detailing the results of the year three review of Roadmap 2021 conducted in 2015.

“We are the only barriers to the greatness of our city.
Remember who we are and what makes us special.
Then modernize. Innovate. Take risks.”

- Emad Rizkalla, President and CEO.

Bluedrop Performance Learning Inc.

Member, Roadmap Advisory Committee

INTRODUCTION

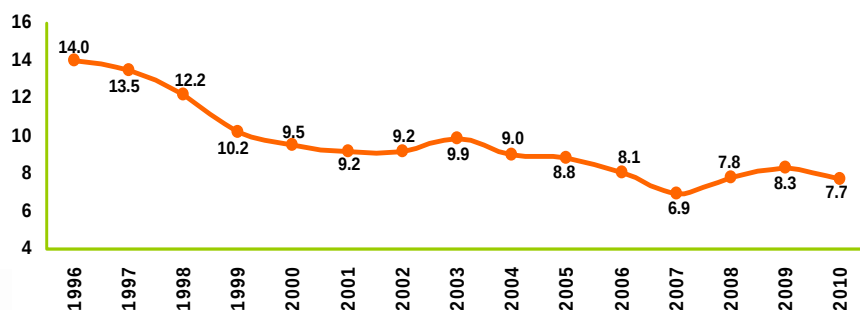
Promise, prosperity and pride

Something extraordinary is happening here. The heart of North America's most easterly city pulses with renewed vigour in this era of unparalleled promise, prosperity and pride. Welcome to a new age of opportunity. Welcome to St. John's.

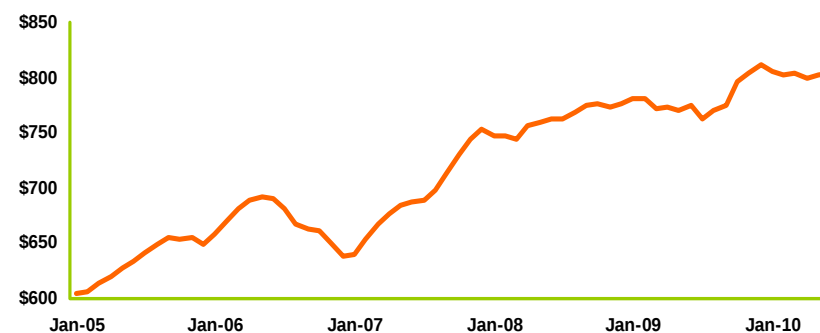
Over the past decade, St. John's has been energized as a hub of economic activity. Fuelled by offshore petroleum and a wealth of other natural resources, this is a city that has made significant strides forward.

Public and private investments have reached record levels, personal disposable income is on the rise, unemployment levels are at a low, and business development opportunities are the best in years. All this - combined with the fact that we remain a safe and caring place - has made St. John's a very attractive place to live, visit and do business.

Average Weekly Earnings
St. John's CMA 2005 - 2010



Average Weekly Earnings
St. John's CMA 2005 - 2010



St. John's has garnered an international reputation for its considerable expertise in ocean technology and research. It has emerged as a unique and compelling tourism destination and has become recognized as a vibrant cultural centre.

Resolute in its connection to place and invigorated by diversity of new perspectives, St. John's has strengthened its position as an important and exciting city. Newfound prosperity has generated a collective confidence and optimism for the future. Despite global economic challenges, we have found ourselves in an enviable position. We must seize the moment.

We must own our future.



Cities as Economic Drivers

Successful modern economies are those that have vibrant and productive cities at their core. Cities are centres of innovation and creativity and generators of economic opportunity. They are at the frontline of change - where the concentration of people, resources and activities offers the most potential for development and diversification.

“Cities, not countries, are the fundamental elements of a developing economy and have been so from the dawn of civilization.”

- Financial Times, May 3, 2006.



ROADMAP 2021

The Strategic Economic Roadmap: 2011- 2021

The Strategic Economic Roadmap sets the stage for a new era of prosperity and growth in St. John's. It is a long-term vision and action plan that provides a framework to guide the province's largest city through to 2021.

Certainly, St. John's has hit its stride and is poised for remarkable growth. This roadmap encourages us to come together - as entrepreneurs, industry partners, community leaders and local government - to grow our city.

Roadmap 2021 is about embracing new directions, leveraging opportunities, building partnerships, developing linkages and taking new approaches to support the advancement of Newfoundland and Labrador's capital city. We recognize the need to effectively manage the opportunities and challenges of a city on the move.

One of the building blocks of making a great city is good strategic planning; where, as a community, we reflect and take a good look at where we are and where we want to be. As such, Roadmap 2021 is a plan to guide the city's economic development over the next ten years. It articulates a bold vision, sets guiding principles, identifies strategic goals and outlines a series of priority actions to be undertaken by the City of St. John's and its various partners. It will carry us forward as we build on our past achievements and chart a course to create an even better St. John's.

Above all, this document is a roadmap for a strong, vital and livable St. John's which, in turn, will power the success of Newfoundland and Labrador. The city's success and the province's success go hand in hand.

That said, to realize our vision, we need to continuously plan for change. New issues, challenges, trends and opportunities will emerge throughout the ten-year life of the strategy. This plan will be reviewed regularly and, if needed, modified to ensure priorities are met. We will continue to consult with our partners as we work towards concrete actions and goals.





What is Economic Development?

Simply speaking, economic growth is about producing more goods and services. Economic development is about new conditions and directions.

Economic growth is concerned with making increases to that which already exists in the economy – more jobs, more infrastructure, more capital investment. Economic development considers the diversification of the economy, embracing social and intellectual dimensions, while making fundamental changes to advance the economy and make it more robust in the longer term.

Adapted from: Bradfield, Michael, 1988. *Regional Economics Analysis and Policies in Canada*, McGraw-Hill Ryerson Limited.

EVOLUTION OF ROADMAP 2021

Process

Roadmap 2021 was developed in partnership with key stakeholders and in consultation with the community. The City took a hands-on approach – leading the effort, but drawing heavily upon the wealth of knowledge and expertise from partners.

This document is the result of considerable research, analysis, and consultation.

Formation of committees

To focus efforts, two committees were formed to guide the development of the roadmap.

A Working Committee with representatives from the City of St. John's, the Atlantic Canada Opportunities Agency and the Department of Innovation, Business & Rural Development, Government of Newfoundland and Labrador was formed to oversee the day-to-day activities involved.



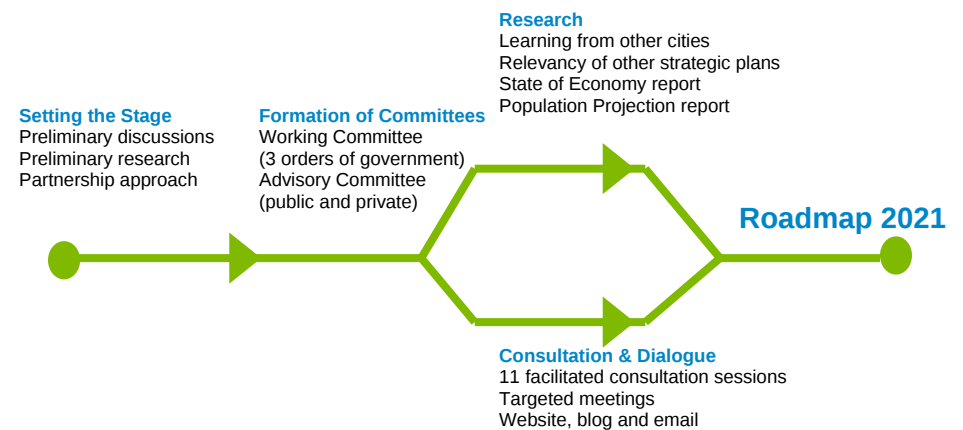
In addition, a volunteer Advisory Committee comprised of both public and private sector representatives was approved by City Council in January 2010. The Advisory Committee provided guidance on the process of research and consultation and offered advice and oversight.

Members of the Advisory Committee:

- Atlantic Canada Opportunities Agency: Paul Mills, Vice-President, Newfoundland and Labrador office
- Bluedrop Performance Learning: Emad Rizkalla, President and CEO
- City of St. John's: Debbie Hanlon (Chair), Councillor; Bob Smart, City Manager; Ron Penney, retired City Manager
- Innovation, Business and Rural Development, Government of Newfoundland and Labrador: Brent Meade, Deputy Minister
- Memorial University of Newfoundland: Dr. Chris Loomis, Vice-President (Research)
- Pope Productions: Paul Pope, President
- St. John's Board of Trade: Derek Sullivan, Past-Chair
- Students in Free Enterprise, Memorial: Liam Kelly, Outgoing President

Collectively, the Working and Advisory Committees provided an exceptional level of economic development and strategic planning expertise to the development of Roadmap 2021.

**Illustration 1:
Evolution of Roadmap 2021**



Lessons from other cities

There is much to be learned from the experiences of other cities. The Working Committee completed a review of the economic strategies of 22 Canadian cities and five international cities/regions. In addition to reviewing the process used by some of these cities to develop strategies, the Committee considered the challenges faced by the communities and the priority actions identified to address these challenges. Though the cities varied greatly in terms of population and economic composition, there was a surprising degree of similarity in the challenges they each face. Challenges related to economic diversification, workforce attraction and retention, and density and sustainable development were common. The approaches implemented to deal with these challenges greatly informed the actions considered for Roadmap 2021.

Relevancy of other strategic plans

Roadmap 2021 was considered in tandem with several strategic plans that have been adopted by the City of St. John's, including, but not limited to, the 2010-2013 Corporate Strategic Plan, and the Recreation Master Plan. The relationship between the roadmap and other city plans is depicted in Illustration 2.

Illustration 2: Roadmap 2021 within the City's internal planning environment



In recent years, a number of provincial government strategies have also been completed and several of these had direct relevance for this strategy. The Working Committee reviewed six such strategies, paying particular attention as to how directions and initiatives might be aligned.

State of the city

As part of the research process, the Working Committee analyzed information about the current state of the local economy in St. John's. The *State of the Economy Report* and the *Population Projection Report* were completed to inform the roadmap. These reports can be found online at www.stjohns.ca.

Public consultation and stakeholder dialogue

Consultation was an integral part of the development of the roadmap. Dialogue not only informed the roadmap but helped foster community engagement and ownership. A professional facilitator was hired to coordinate and undertake a series of consultation sessions.

In total, 11 facilitated consultation sessions were held with representatives from:

- Ocean Technology/Energy
- Business and Investment
- Tourism
- Arts and Culture
- Immigration and Newcomers
- Young Professionals
- Youth/Students
- Regional Municipalities
- St. John's City Council
- Social/Not-for-Profit
- General Public



In addition, meetings were held with various groups and organizations including the Department of Human Resources, Labour and Employment (Youth Retention and Attraction Strategy), Memorial University (research plan), the St. John's Airport Authority, the St. John's Port Authority, labour groups, senior officials from the Government of Newfoundland and Labrador, a cross-section of staff from ACOA and a group of new residents.

Comments, feedback and suggestions from the general public were also encouraged via email and an online blog.

Due Diligence

The Working Committee reviewed the experiences and lessons learned from other cities and regions.

- Calgary - Edmonton - Fredericton - Greater Sudbury - Halifax
- Hamilton - Kingston - Kitchener - London - Moncton - Montreal
- Niagara - Ottawa - Regina - St. Catharines - Saskatoon
- Thunder Bay - Toronto - Vancouver - Victoria - Windsor
- Winnipeg - Aberdeen, Scotland - Austin, Texas - Cardiff, Wales
- East Midlands, UK - Stavanger, Norway

A review of provincial strategies also informed Roadmap 2021.

- *Creating a Province of Choice: A Youth Retention and Attraction Strategy for Newfoundland and Labrador*
- *Diversity, Opportunity and Growth: An Immigration Strategy of Newfoundland and Labrador*
- *Focusing our Energy: Newfoundland and Labrador Energy Plan*
- *Innovation Newfoundland and Labrador: A Blueprint for Prosperity*
- *Oceans of Opportunity: Newfoundland and Labrador's Ocean Technology Sector Strategy*
- *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism*



“[St. John’s]....appears to be a rising star and should be watched closely. In four of the indicators that measure growth - personal disposable income, productivity, GDP, and non-residential building permits - St. John’s earned a solid ‘A’.”

- *City Magnets: Benchmarking the Attractiveness of Canada's CMAs*,

The Conference Board of Canada, December 2007.

ASSESSING ST. JOHN'S: OUR STRENGTHS AND CHALLENGES

STRENGTHS

Leveraging and cultivating our strengths is key to securing our future. St. John's has a multitude of competitive advantages on which to build:

Economy

As the capital city, St. John's is the economic hub of Newfoundland and Labrador. Economic growth has placed significant opportunities on the city's doorstep - opportunities that can be leveraged to create diversification and ensure future prosperity.

Pride of place

Residents and businesses are invested in this city. They believe that St. John's is a leader in the province and can, in many aspects, be a leader in the nation and even on a global scale. Now, perhaps more than ever in the city's storied history, there is a sense of renewed optimism and pride about the future and St. John's place in it.

Quality of life

St. John's has an enviable quality of life - cosmopolitan enough to offer a range of amenities, yet small enough to be family-friendly and feel like home. Easy access to nature and trail networks is a tremendous lifestyle asset.

Arts and culture

The arts community in St. John's is creative, dynamic and widely recognized. The arts are valued by the public and the business community for the immense contribution they make to the vibrancy and quality of life of the city.

Niche industries

St. John's has developed strengths in ocean technology, energy and tourism. These sectors offer considerable potential for future growth and diversification.



Close-knit community

St. John's is a close-knit community, yet one that embraces newcomers. The ease with which people are able to make connections, network and partner is the envy of many cities.

Downtown is the heart of the city

For centuries, the downtown core and its harbour have been the commercial and cultural heart of St. John's. The downtown area is also recognized for its heritage and historic value. A vibrant downtown is essential to building an attractive and livable city.

University and colleges

Memorial University of Newfoundland, the College of the North Atlantic and our private colleges are tremendous assets. Not only do these institutions attract and educate thousands of students annually, they are home to hundreds of researchers and are sources of innovation, investment, new business and future leaders.

Connection to home

Newfoundlanders and Labradorians have an undeniable connection to the province - a connection that remains steadfast no matter where we reside or wander. This special connection to home is one of our strongest marketing tools.

The 'it' factor – quirky and distinct

St. John's has an "it" factor, a uniqueness and vibe that makes the city different and distinct. Residents and businesses alike value the city's uniqueness and believe it should be cultivated.

Connections to the world

St. John's is home to an international airport, bustling port and modern telecommunications networks and services. These critical pieces of infrastructure generate significant economic activity for the city, region and province and are key components in future growth and development.



CHALLENGES

While our circumstances have undoubtedly changed for the better in recent years, some challenges remain. Understanding and addressing these challenges will enable the city to achieve its full potential.

Demographics and workforce

The population is aging and the working age population is in decline. A vibrant economy requires a robust workforce. Retaining and attracting talent will be key to future economic prosperity, particularly given ongoing and proposed industrial developments in the St. John's region and throughout the province.

Diversification and investment

The oil and gas industry is a major driver of economic growth in St. John's and the surrounding areas, yet oil is a non-renewable resource. Without continued exploration and the discovery and development of new fields, production will decline over the long term. Diversification is key to building and sustaining a robust economy.

Business environment

In business, competitiveness and opportunities are key to success. St. John's must offer a business environment that enables companies to grow, diversify and expand. Understanding and addressing impediments to business retention and growth, creating efficiencies in the regulatory environment, and developing mechanisms for enhanced communications are essential to improving the business environment and encouraging business development.

Growing the private sector

The private sector is a source of innovation, employment and investment. In St. John's, the private sector is comprised of small businesses, with a majority employing fewer than five people. By comparison the public sector in St. John's is quite large. Growing the small business sector is crucial to building the economy over the long term.



Density

Density in the urban core reduces sprawl, creates efficiencies, lessens environmental impacts and directly affects the vibrancy, attractiveness and livability of a city. Density is also particularly important to young people who generally wish to live, work and play in a compact urban core. Encouraging density in St. John's will help build a vibrant city.

Capacity

Economic growth is creating opportunity in St. John's but it is also creating pressure on commercial and residential real estate, infrastructure and amenities. Addressing capacity issues is essential to long-term economic development and to ensure the community is equipped to deliver services and amenities demanded by residents, newcomers and the business community.



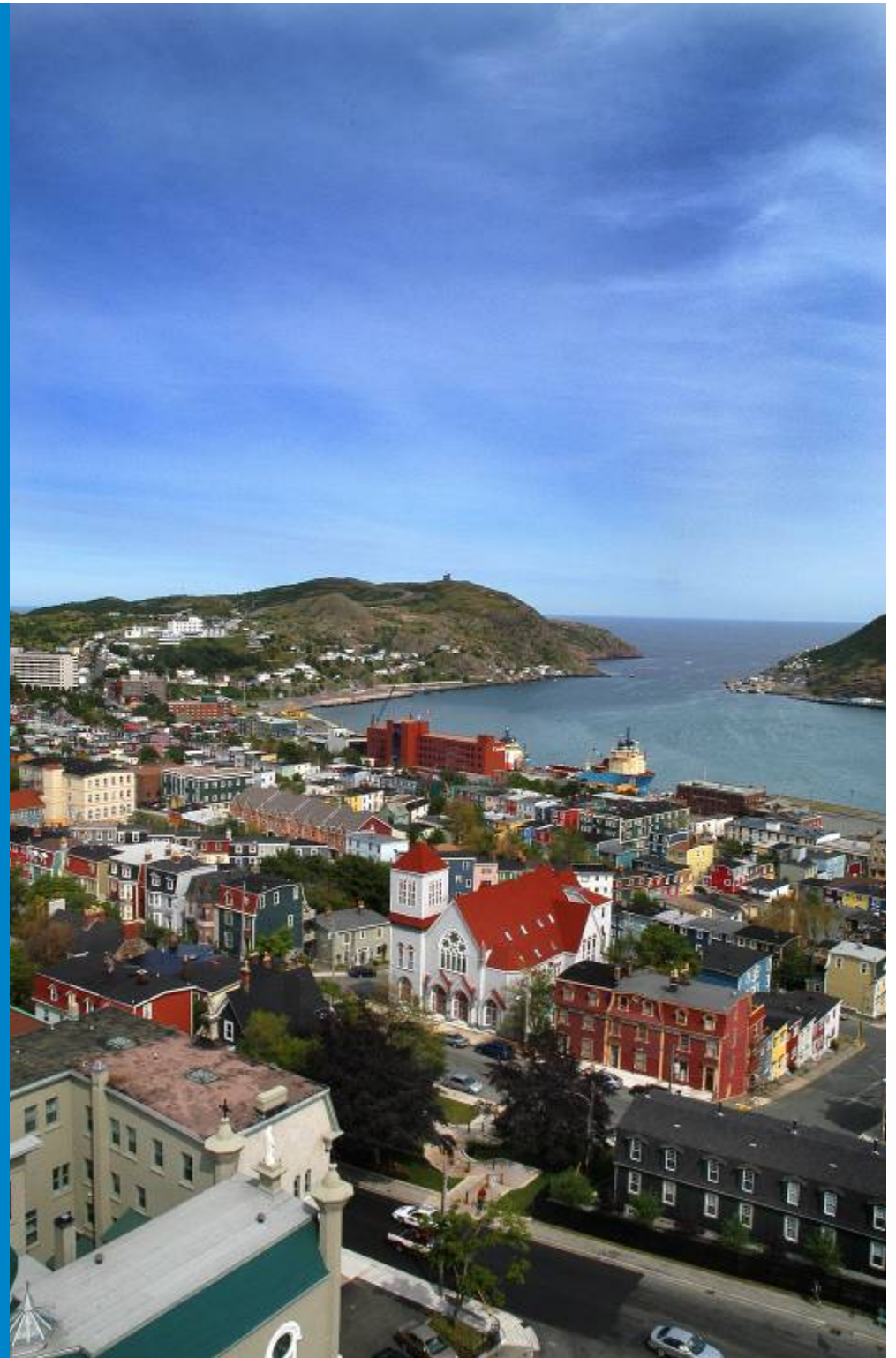
"If the economy of Newfoundland and Labrador is to grow as anticipated, we will need to focus more resources and energies in attracting qualified people."

- Michael Clair, Associate Director for Public Policy, Harris Centre, Memorial University. "From Out-migration to Immigration: The Changing Policy Landscape", *Newfoundland Quarterly* Volume 101, Number 2, 2008.



VISION

St. John's is a vibrant city capitalizing on its energy, creativity and distinctiveness to embrace economic progress and enhance quality of life.



PRINCIPLES

Four principles underpin the development - and reflect the values - of this roadmap.

LEVERAGING OUR UNIQUENESS

St. John's distinctiveness is a major advantage. Understanding and cultivating that uniqueness is crucial to achieving the city's potential.

NURTURING INNOVATION AND CREATIVITY

Today's economy is fueled by innovation. Only by seeking out and encouraging innovative and creative approaches will St. John's continue to grow and to lead progressive change.

WORKING IN PARTNERSHIP

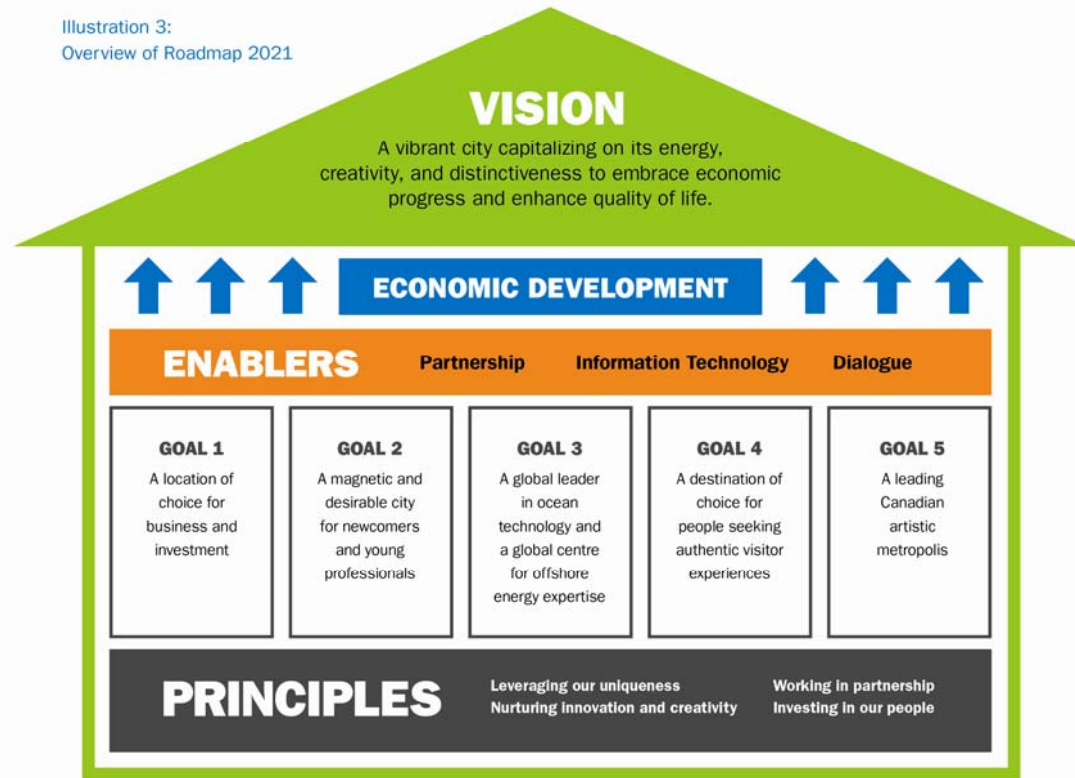
A city does not, and cannot, work in isolation. Advancing the economy requires cooperation and partnership at every turn. A partnership philosophy - between entrepreneurs, community leaders, industry partners, and municipal government - is fundamental to achieving the goals set out in the roadmap.

INVESTING IN OUR PEOPLE

People make a city and a community. People also drive the economy. Working together, communicating with each other, and celebrating achievements help build an engaged and motivated community.



Illustration 3:
Overview of Roadmap 2021



ROADMAP 2021: THE PLAN

GOALS: AN OVERVIEW

Five strategic goals were established to provide a clear focus for the future. The action plan to implement these goals is detailed fully in a latter section.

By 2021, St. John's will be:

GOAL 1: A location of choice for business and investment

Business and investment activity brings employment, opportunities and innovation. Retaining and nurturing business is key to generating long-term, predictable economic activity. Our aim is to create an environment that enables business to grow, diversify, and flourish in a city that celebrates business achievement.

Short-term actions:

- Develop a business visitation program.
- Support initiatives which encourage dialogue and explore creative approaches to heritage, density and sustainability in architectural design.
- Define, quantify and assess the impacts of major natural resource projects on the city region.

GOAL 2: A magnetic and desirable city for newcomers and young professionals

A qualified workforce is an essential ingredient for economic development and innovation. Securing a vibrant and healthy workforce necessitates a focused approach to both retaining and attracting professionals and skilled labour. We need to encourage diversity and nurture our young professionals

Short term actions:

- Establish Nexter (19-35 years) representatives on City advisory committees.
- Within the City's existing conference/event support program, consider amendments to increase assistance for Nexter-based conferences and events.



GOAL 3: A global leader in ocean technology and a global centre for offshore energy expertise

St. John's has a critical base of research facilities, companies and expertise related to offshore petroleum development and ocean engineering and technology. Local expertise in harsh environments has specific application to opportunities emerging in other jurisdictions including the North. The core competencies that have been developed locally can be leveraged and applied around the globe.

Short term actions:

- Encourage the development of an Arctic Thinkers Forum.

GOAL 4: A destination of choice for people seeking authentic visitor experiences

Tourism makes an important contribution to the St. John's economy. St. John's offers visitors an intriguing blend of history, culture and natural experiences, all within an urban setting. Compelling provincial marketing campaigns are increasing awareness and opening opportunities for future growth. In fact, the province has become known as a creative, innovative, must-see destination. We must build on this momentum.

Short term actions:

- Partner in and support the National Geographic Geotourism MapGuide Project.
- Develop the Quidi Vidi Craft Incubator and Visitor Centre.
- Develop an initiative which enables the city to build relationships with visitors.

GOAL 5: A leading Canadian artistic metropolis

The arts community in St. John's is distinct and original. The vibrancy, attractiveness and livability of the city are inherently tied to the arts. Artists also make a significant economic contribution to the region.

Short term actions:

- Develop an initiative that delivers art and event information to the public in a one-stop, easy to access manner.
- Undertake a feasibility assessment that may lead to the establishment of an arts centre.
- Work in partnership to foster new relationships between the arts and business communities.



STRATEGIC GOALS AND ACTION PLAN

ST. JOHN'S IS A LOCATION OF CHOICE FOR BUSINESS AND INVESTMENT

Business and investment activity bring employment, opportunities and innovation. Retaining and nurturing business is key to generating long-term, predictable economic activity. Our aim is to create an environment that enables business to grow, diversify and flourish in a city that celebrates business achievement.

WHERE WE ARE IN 2011

- The private sector is a source of innovation, employment and investment.
- Economic forecasts in the short to mid-term are positive, driven largely by major natural resource projects. The longer term financial forecast is less certain.
- There is a general sense of optimism in the local business community.
- The private sector in St. John's is comprised primarily of small businesses.
- The private sector in St. John's is small in relative size compared with the public sector.
- The economy is largely export-focused.
- As the capital city, St. John's is the centre of government, commerce, research and education in the province.
- St. John's is home to an international airport and seaport and is a main entry and exit point for people and products.

WHAT WE HAVE LEARNED AND HEARD

- St. John's must be an efficient city in which to do business.
- The availability of commercial real estate is limited, particularly in the downtown.
- There is a need to encourage density in residential and commercial development in the downtown and city core.
- Commercial development in the downtown is often contentious.
- The process for development is often misunderstood and there is a perception that it is problematic.
- There is an opportunity to create synergies with the university and colleges to nurture innovation and create new business.
- There is an opportunity to create a marketing buzz around the business sector.
- The city region is experiencing capacity pressures created by the economic activity related to major natural resource projects.
- The downtown and its harbour are recognized and valued as the heart of the city.
- There are opportunities to communicate more effectively about City processes and initiatives.



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
IMPROVING CITY PROCESSES AND BUSINESS RELATIONS			
1. With the participation of several City departments and partners, develop a business visitation program beginning in the downtown. This program will facilitate a dialogue with the business community, identify issues which may be impediments to business retention and growth and inform City programs and policies.	Short	Lead	Business/ industry Governments
2. Explore opportunities to establish a public-private task force to investigate ways of creating more effective and efficient municipal and other regulatory environments.	Medium	Lead	Business/industry Governments
3. Establish a business facilitator role at City Hall that guides the private sector through development processes and works with city departments in identifying opportunities for enhanced efficiencies and effectiveness.	Medium	Lead	Business/ industry
4. Investigate processes for public input that embrace new communications technologies and enable greater public engagement in civic matters.	Ongoing	Lead	
5. Build better relationships and facilitate dialogue between City Council/staff and local business organizations.	Ongoing	Lead	Business/ industry
FOCUSING ON THE DOWNTOWN			
6. Support initiatives which encourage dialogue and explore creative approaches to heritage, density and sustainability in architectural design.	Short	Partner	Architect associations Governments
7. Develop a pilot project to increase upper story and laneway utilization in the downtown. There are pockets of space in the downtown that are currently underutilized. Facilitating the development of this space will increase occupancy, encourage density, and add to the vibrancy of the downtown. A pilot project will inform future approaches.	Medium	Lead	Property/business owners Insurance industry Business/ industry



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
SUPPORTING GROWTH AND DIVERSIFICATION			
8. Ensure the completion of a lands inventory to identify commercial and residential lands available for development in St. John's. Explore opportunities for commercial land developments.	Medium	Partner	Land owners
9. Facilitate an assessment to advance the establishment of a business/technology park. This park could provide the physical space and collaborative environment necessary to grow the innovative enterprises critical to economic diversification. A technology park could also be an important bridge with the university and college systems as they cultivate research, innovation and new entrepreneurs.	Long	Influence	Governments Post-secondary Business support agencies Business/ industry
10. Identify, with the help of partners, emerging industries with potential for medium-term growth and diversification, paying particular attention to the strengths resident in the post-secondary community.	Long	Influence	Governments Post-secondary Business/ industry
MARKETING AND PROMOTION			
11. Encourage CEOs/executive boards and high profile business events to meet in St. John's. Bringing decision makers and leaders to the city will showcase St. John's as a dynamic business community with considerable investment potential.	Ongoing	Partner	Destination St. John's Governments Business/ industry
12. Ensure St. John's is adequately represented in relevant national projects, initiatives, and policies and participates in appropriate national and international rankings and studies. These activities will enhance the city's presence in the national context, help ensure national policies reflect the issues that are of relevance to St. John's and aid the city in benchmarking its programs and policies.	Ongoing	Lead	Governments Post-secondary
13. Develop an annual initiative to acknowledge significant local achievements in areas relevant to the directions set out in Roadmap 2021.	Medium	Lead	



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
RESEARCH, INFORMATION AND POLICY			
14. Define, quantify and assess the impacts of major natural resource projects on the city region. By better understanding these impacts, the community will be more fully equipped to address immediate capacity issues and will be more informed about medium and long-term opportunities.	Short	Lead	Business/ industry Governments Other municipalities Regional organizations
15. Investigate opportunities to encourage the use of green and environmental practices both within the City corporation and the greater business community. With partners, establish an initiative which recognizes businesses and buildings/developments that have adopted green technologies or processes.	Long	Partner	Business/ industry Governments

¹ Short = 2 years, Medium = 5 years, Long = 10 years, Ongoing = an existing initiative that will be continued and/or enhanced.

² Lead = City assumes the primary role for ensuring implementation. Partner = City works in conjunction with other organizations. One or more other organizations may assume the lead in implementation. Influence = City encourages implementation. One or more other organizations may assume the lead in implementation.



ST. JOHN'S IS A MAGNETIC AND DESIRABLE CITY FOR NEWCOMERS AND YOUNG PROFESSIONALS

A qualified workforce is an essential ingredient for economic development and innovation. Securing a vibrant and healthy workforce necessitates a focused approach to both retaining and attracting professionals and skilled labour. Our aim is to nurture youth and young professionals (the Nexter generation, 19 -35 years), embrace diversity and promote St. John's as an ideal city in which to live and work.

WHERE WE ARE IN 2011

- St. John's is facing significant demographic pressures which will impact the workforce.
- Immigration levels are increasing. However, the numbers are still relatively low when compared with many other cities.
- St. John's is the largest metro centre in Newfoundland and Labrador and the major centre of employment.
- There is aggressive competition for people nationally and internationally.
- Major natural resource and construction projects will bring significant labour demands.
- St. John's has a large post-secondary student community.

WHAT WE HAVE LEARNED AND HEARD

- The special connection of Newfoundlanders and Labradorians to home present opportunities for repatriation.
- Nationally, there is a favourable perception of Newfoundland and Labrador, but there is still work to be done.
- St. John's is a family friendly city.
- The per capita amenities in St. John's are quite high, giving the city a 'small, big city feel'.
- Public transit and other alternative forms of transportation are particularly important to young people.
- Air travel, in terms of both accessibility and affordability, is critical to retaining and attracting people.
- The availability and affordability of a range of housing is a concern.
- St. John's has a range of outdoor recreation and leisure amenities valued by residents and desirable to newcomers.
- Young people are attracted to cities that embrace density and have a vibrant urban core.
- There are opportunities to better package and promote what St. John's can offer residents and newcomers.
- New people bring new ideas and encourage innovation.
- In many communities markets are a focal point, encouraging social interaction, supporting cultural diversity and local production.
- Business incubators encourage and support the development of young entrepreneurs and offer opportunities for diversification.



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
ENGAGING AND CELEBRATING YOUNG PEOPLE			
1. Establish Nexter (19-35 years) representatives on City advisory committees. Young people bring new and different perspectives to local issues. A city that values and engages the Nexter perspective is a dynamic and forward-looking city.	Short	Lead	Governments
2. Within the City's existing conference/event support program, consider amendments to increase assistance for Nexter-based conferences and events. These events offer opportunities to showcase the city and its amenities to potential future students, residents and employees. In addition, local Nexters will have increased opportunities to participate in national and international events.	Short	Lead	
3. In partnership with post-secondary institutions, develop an initiative that communicates with students over the course of their studies and ultimately encourages them to work and live in St. John's.	Ongoing	Partner	Post-secondary Business/ industry
4. Seek opportunities to establish Emerging Leader awards for St. John's to recognize and celebrate the contributions of our young people.	Medium	Partner	Governments Post-secondary
FOSTERING A VIBRANT COMMUNITY			
5. Seek opportunities to enhance the presence of a community marketplace in St. John's. Marketplaces support local food and products, celebrate multiculturalism, encourage social cohesion and contribute to the vibrancy of a city.	Medium	Influence	Governments Community organizations
6. Support and promote the regional integrated trail systems. Collectively, our trail systems are unparalleled and should be better promoted as a key asset for healthy living.	Medium	Partner	Other municipalities Trail organizations Governments



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
7. Engage in opportunities to encourage the use of public transit and other alternative forms of transportation. Attractive and progressive cities are those that embrace a variety of environmentally responsible transportation methods.	Medium	Influence	Transit authorities Community organizations Post-secondary
8. Identify opportunities to enhance the profile of multiculturalism in St. John's and develop a 'welcoming communities' program for the city.	Ongoing	Partner	Community organizations Governments
9. Encourage the development and expansion of strategic air routes.	Ongoing	Influence	St. John's International Airport Authority Governments Business/industry Post-secondary

INFORMATION AND MARKETING

10. Enter into an ongoing dialogue with public and private sector recruiters to identify information gaps and issues related to relocation and retention and to develop appropriate information products, services and tools.	Medium	Lead	
11. Develop a marketing approach to attract newcomers and enhance the electronic delivery of relocation and settlement information.	Medium	Lead	Governments

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ST. JOHN'S IS A GLOBAL LEADER IN OCEAN TECHNOLOGY AND A GLOBAL CENTRE FOR OFFSHORE ENERGY EXPERTISE

St. John's has a critical base of research facilities, companies and expertise related to offshore petroleum development and ocean engineering and technology. Local expertise in harsh environments has specific application to opportunities emerging in other jurisdictions including the North. The core competencies that have been developed locally can be leveraged and applied around the globe. Our aim is to promote and solidify St. John's position as a leader in ocean technology and as a centre for offshore energy expertise.

WHERE WE ARE IN 2011

- Companies and institutes in the region have inherent knowledge of working and operating in harsh ocean environments.
- There is a continuing global demand for petroleum.
- The petroleum industry has had a significant impact on the economic growth of St. John's.
- Companies and institutes are exporting their expertise to other jurisdictions.
- Newfoundland and Labrador has significant offshore energy resources.
- St. John's is home to world-class ocean technology infrastructure, education and training.
- Commercial, environmental and sovereignty issues in the North are of global interest.
- There is an increasing demand globally for innovative technologies related to resource extraction and production.
- Major oil projects are under development. However, continued exploration is essential to building the industry.
- The volatility of global oil prices and international events impacts investment.
- The St. John's region is the main service and supply centre for the offshore petroleum industry in Newfoundland and Labrador.
- Efficient and reliable airport and seaport transportation are critical for exporting and importing goods and services.

WHAT WE HAVE LEARNED AND HEARD

- The private sector in St. John's is small in the global context.
- St. John's has a growing reputation and presence in international ocean technology and petroleum markets, but more can be done to strengthen that position.
- There is intense competition amongst cities for highly qualified personnel.
- There are commercial opportunities to apply local expertise to Arctic and other northern regions.
- There are a variety of capacity issues related to growing and developing the ocean technology and energy sectors in the region, including real estate and other basic infrastructure and amenities.
- The availability and affordability of air transportation are essential to attracting and retaining highly qualified personnel.
- The quality of life in St. John's is an important selling feature.



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
MARKETING AND PROMOTION			
1. Enhance the marketing of local harsh environment expertise within St. John's current positioning as a City of Ocean Excellence. Develop a niche marketing program that will help cultivate the sector's export potential.	Medium	Partner	Business/ industry Governments Post-secondary
2. Expand the existing media program which places editorial about local ocean technology companies and institutes in key international trade publications and online media sources.	Ongoing	Lead	Business/industry Governments
3. Enhance Ocean Week, with local and regional partners, as an avenue for profiling ocean technology expertise, providing opportunities for business development and enhancing public awareness.	Ongoing	Lead	Business/industry Governments Post-secondary Other municipalities
PURSUING NICHE OPPORTUNITIES			
4. Encourage the development of an Arctic Thinkers Forum to engage local, national and international experts in a discussion on the challenges and opportunities associated with development in the Arctic. The forum could showcase local knowledge, contribute to international policy and reinforce St. John's position as a global leader.	Short	Partner	Governments Post-secondary Policy organizations
5. Explore opportunities to partner with other communities and regions in the province to increase our collective ability to access business opportunities related to the Arctic and the North.	Medium	Partner	Other municipalities Governments
6. Support the attraction of ocean and energy related conferences to St. John's, including both flagship (OCEANS 2014) and niche events. These events showcase local knowledge, increase opportunities for business development and strengthen St. John's position as a City of Ocean Excellence.	Ongoing	Partner	Destination St. John's Governments Business/industry Post-secondary Research agencies



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
7. Seek opportunities to enhance St. John's participation in international city memberships and affiliations. These opportunities enable the City of St. John's and local companies to make key connections in international markets.	Ongoing	Lead	Governments Business/industry
COMMUNICATION AND DIALOGUE			
8. Facilitate a regular dialogue between Council and key players in the petroleum industry. This sector has a tremendous impact on the city and encouraging an open dialogue is key to managing these impacts to mutual benefit.	Ongoing	Lead	Business/industry
9. Partner on the Ocean Technology Speaker Series as a means of facilitating dialogue and communication, and enhancing collaboration in the local ocean technology cluster.	Ongoing	Partner	Business/industry

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ST. JOHN'S IS A DESTINATION OF CHOICE FOR PEOPLE SEEKING AUTHENTIC VISITOR EXPERIENCES

Tourism makes an important contribution to the St. John's economy. St. John's offers visitors an intriguing blend of history, culture and natural experiences, all within an urban setting. Compelling provincial marketing campaigns are increasing awareness and opening opportunities for future growth. Our aim is to ensure that St. John's has the infrastructure, amenities and products necessary to enhance the visitor experience and support the continued development of tourism.

WHERE WE ARE IN 2011

- Tourism is a strategic industry identified by the Province in the strategy *Uncommon Potential*.
- St. John's offers a unique and eclectic tourism product.
- Critical tourism infrastructure is in place in the city – hotels, St. John's Convention Centre, Mile One Centre, St. John's International Airport, etc.
- St. John's and Newfoundland and Labrador have been experiencing steady growth in the tourism sector.
- St. John's has particular strengths in built and intangible heritage, as well as the natural environment.
- Tourism is a renewable natural industry with potential for longevity.
- Leisure and convention tourism tends to occur largely within the spring and summer months.
- The provincial marketing program has greatly increased awareness and visitation.
- St. John's is the main entry and exit point for visitors to the province.

WHAT WE HAVE LEARNED AND HEARD

- St. John's has capacity issues in terms of ground transportation, accommodations and the capacity of the convention centre.
- The accessibility and cost of air and sea transport have a significant impact on the tourism sector.
- There is an opportunity to increase visitor expenditures.
- There is an opportunity to develop more consistent, high quality tourism products, particularly those related to geotourism and cultural tourism.
- There is an opportunity to better define and market the urban product and experience.
- George Street is iconic.
- New target markets are emerging, including China.
- The adventure cruise sector offers opportunities for St. John's, particularly in relation to cruising northern frontiers.
- Technology has become essential to every stage of the visitor experience, including pre and post visit.
- The downtown and its harbour are synonymous with the St. John's tourism product.
- St. John's offers an urban experience with nature on the doorstep.
- St. John's has a variety of established and emerging festivals and special events.



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
DEVELOPING TOURISM PRODUCTS AND PROGRAMS			
1. Partner in and support the National Geographic Geotourism MapGuide Project. This comprehensive project will provide an international platform to showcase the city's unique tourism assets.	Short	Partner	Governments Business/ industry National Geographic
2. Support existing festivals and events and explore opportunities to enhance events which will extend the tourism season into the full year.	Medium	Partner	Festival and event organizations Business/industry Governments
3. Enhance visitor focused programming in the downtown. The downtown is a focal point for visitors and improving programs and services will enrich experiences and bring increased economic returns.	Medium	Partner	Downtown Development Commission
4. Further develop adventure cruising initiatives. The St. John's tourism product is ideally suited to capture opportunities related to cruising the northern frontiers. Staging these cruises from St. John's offers opportunities to maximize returns.	Ongoing	Partner	Cruise Newfoundland and Labrador St. John's Port Authority International partner destinations
5. Capture opportunities related to future special anniversaries and celebrations. These events showcase the city and encourage visits, particularly by expats.	Ongoing	Partner	Governments Post-secondary Community organizations
6. Articulate the urban visitor experience. Identify and develop a range of product offerings that can be packaged to maximize the visitor experience and increase returns.	Long	Partner	Governments Destination St. John's Business/industry



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
DEVELOPING NECESSARY INFRASTRUCTURE			
7. Develop the Quidi Vidi Craft Incubator and Visitor Centre. Located in Quidi Vidi Village, this facility will offer visitors an opportunity to engage and interact with emerging craft persons, access visitor information and experience the history and lifestyle of an historic fishing community. The Centre will make an important contribution to the city's cultural tourism product.	Short	Lead	Artisan/craft organizations Community organizations Governments
8. Support the redevelopment of the St. John's Convention Centre. Conventions bring significant returns to the city. St. John's is a highly sought after convention destination. However, the city's current infrastructure limits its ability to capture a greater proportion of the convention market.	Ongoing	Partner	Destination St. John's Governments
9. Implement a comprehensive themed tourism signage strategy. A program of vehicular and pedestrian directional and destination signage will enhance the visitor experience.	Medium	Lead	Governments Business/industry
10. Develop partnerships to encourage the redevelopment of George Street and identify opportunities to enhance on-street programming that is linked to the comprehensive architectural plan. Improving the infrastructure and programming on George Street would enhance the visitor experience and increase the returns from an already iconic tourism asset.	Long	Partner	George Street Bar Owners Association Governments Business/industry
ENHANCING THE CITY'S PROFILE			
11. Partner with the travel media program by hosting travel writers in St. John's for the purpose of generating editorial coverage in a variety of national and international media sources.	Ongoing	Partner	Governments Business/industry



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
EMPLOYING COMMUNICATION TECHNOLOGIES			
12. Develop an initiative which enables the City to build relationships with visitors. Every year thousands of tourists make contact with the City's visitor information centres. There is an opportunity to develop ongoing communication with visitors to both reinforce their connection to St. John's and provide an easy means of extending 'word of mouth' messaging.	Short	Lead	
13. Develop a strategy to identify leading technology tools and applications to enhance the City's delivery of visitor services.	Medium	Lead	Destination St. John's

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ST. JOHN'S IS A LEADING CANADIAN ARTISTIC METROPOLIS

The arts community in St. John's is distinct and original. The vibrancy, attractiveness and livability of the city are inherently tied to the arts. Artists also make a significant economic contribution. Our aim is to support artistic endeavours, ensure the availability of appropriate creative spaces, nurture relationships between the arts and business, and foster an engaged community.

WHERE WE ARE IN 2011

- The City of St. John's has adopted a Municipal Arts Plan.
- The arts community in St. John's is prolific.
- There is an identifiable creative cluster in St. John's.
- Local artists have received considerable recognition in national markets.
- The arts contribute significantly to the quality of life in the city.
- Artists are also small businesses and as such generate economic activity and employment.
- The arts are an integral part of Newfoundland and Labrador's culture and way of life.

WHAT WE HAVE LEARNED AND HEARD

- There are limited data which document the contribution the arts make to the local economy and society.
- There is a lack of appropriate creative spaces in St. John's.
- The collaborative nature of the arts community is unique and not experienced elsewhere.
- There is a need for long-term, predictable public and private investment in the arts.
- Audience information on arts and associated events in the region is fragmented.
- There are opportunities for increasing audience and public engagement in the arts.
- Enhancing the business skills of artists could help maximize their returns.
- A vibrant cultural community is desirable for retaining and attracting highly qualified personnel.



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
DELIVERING AND IMPLEMENTING THE GOALS AND STRATEGIC DIRECTIONS IDENTIFIED IN THE CITY'S MUNICIPAL ARTS PLAN			
DEVELOPING AUDIENCES			
1. Develop an initiative that delivers art and related event information to the public in a one-stop, easy to access manner. Event information in the region is currently delivered by a large number of organizations. There is an opportunity to develop a more consistent, comprehensive and efficient delivery system which facilitates audience awareness and participation.	Short	Partner	Governments Business/ industry Other municipalities Community and art organizations
DEVELOPING INFRASTRUCTURE			
2. Undertake a feasibility assessment that may lead to the establishment of an arts centre. The need for available and appropriate arts space is essential to both sustaining and growing the arts community.	Short	Partner	Governments Community and art organizations
INVESTING IN THE ARTS			
3. Support research to document the contribution the arts make to the local economy. Due to limited documentation, public and private sector investors have an insufficient understanding of the range of contributions that the arts make to society and the economy. Quality research could help support long term, predictable investment.	Medium	Influence	Governments



ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
LINKING ARTS AND BUSINESS			
4. Work in partnership to foster new relationships between the arts and business communities. There are opportunities to encourage synergies between these communities to mutual benefit.	Short	Partner	Business/ industry Governments
5. Encourage linkages between business support agencies and artists. Artists are entrepreneurs and developing their business acumen is important to the continued growth, prosperity and vitality of the city.	Medium	Influence	Business support agencies Art organizations

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THE JOURNEY AHEAD

Partnership, information technology, dialogue.

Roadmap 2021 gives us a framework to forge a vibrant future and grow a capital city that will be a strong, economic engine for Newfoundland and Labrador.

Certainly, it is an ambitious document. However, it will guide the way as we work towards the next level of economic development and growth. It builds on our strengths, and it addresses the challenges facing our economy with innovative strategies and actions.

The journey to 2021 will be both challenging and exciting. But together, we will create something far greater than what any one group or organization could achieve alone. Partnership is critical to the success of this strategy. Roadmap 2021 is about shared focus and unified action.

Information technology will play a big role in how we achieve and deliver the actions outlined in the roadmap. We recognize that the rapid advancement of broadband, wireless technologies and mobile devices, along with the application of social media, continue to change the way citizens, businesses and

visitors communicate and access programs and services. Furthermore, technology enables efficient service delivery and enhances opportunities for individuals to actively participate in local matters.

Solid economic development also relies on ongoing dialogue. We, along with our industry partners, recognize the value of keeping the lines of communication open with community leaders and the general public to achieve these goals. We will be seeking opportunities to gather feedback as we move forward.

As work progresses on Roadmap 2021 - and as societal, environmental, technological and economic factors continue to evolve - it will be both necessary and responsible to conduct periodic reviews.

A status report outlining the progress made on the priority actions will be completed and provided annually to stakeholders and the general public. This update will also provide opportunities for continued dialogue and feedback.



A review of the roadmap will be completed and a stakeholder forum held every three years. This forum will be invaluable in determining how the goals and priority actions in the roadmap should be adjusted.

The economic outlook for St. John's is brighter than at any other time in our long and storied history.

Roadmap 2021 charts a course for the next decade, armed with a clear vision and energized with a new sense of purpose.

We are ready to take the next steps.

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Front cover photo: Chris Browne



ADDENDUM A

**Year Three Review of Roadmap 2021
October 2015**

ROADMAP 2021

A Strategic Economic Plan For St. John's

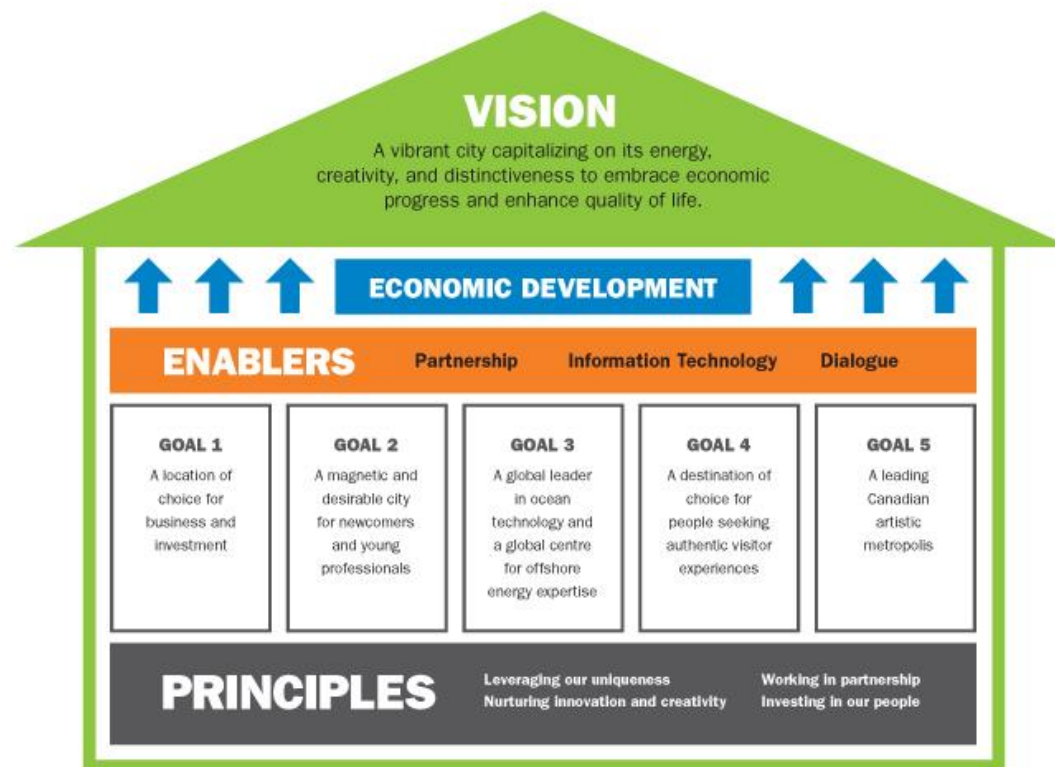
Year Three Review

October 2015



About Roadmap 2021

Roadmap 2021 is a long-term vision and action plan to guide economic development in St. John's. The Roadmap articulates a vision, sets guiding principles, identifies strategic goals and outlines a series of priority actions to be undertaken by the City of St. John's and its various partners. Roadmap 2021 was launched in December of 2011.



The economy since the launch of Roadmap 2021

At the time of the development and launch of the Roadmap in 2010/11, economic and business optimism in St. John's were at an all-time high. Newfoundland and Labrador was leading the country in economic growth, public and private investments had reached record levels, personal incomes were rising, and unemployment was continuing to decline. During the period from 2010-2014, the St. John's economy continued to perform well, with gross domestic product growth of just over 3%, retail sales growth of more than 30%, and employment growth of over 6%.

In early 2015 however, the economic picture in St. John's was beginning to change. Global economic uncertainty created by declining oil prices, was having an impact across the country and here at home.

With lower than expected oil revenues, the 2015 Provincial budget was one of cut backs and restraint. Real GDP growth in St. John's in 2015 is forecasted at just .3%, with little or no growth anticipated in the labour force. The unemployment rate is forecasted to increase by 1.2 points in 2015, and retail sales are expected to remain flat. Although business confidence is still relatively high compared to other jurisdictions, a certain degree of caution has crept into the local business community.

While most economists predict a return to higher commodity prices, there are no clear signals for a recovery in the short-term. St. John's is not immune to global economic pressures, however, investment associated with major project development in the province is expected to continue. Oil producers have indicated that they remain committed to Newfoundland and Labrador's offshore and this offers confidence in the longer term.

Roadmap review

Roadmap 2021 was developed as an evergreen plan; one that would be regularly reviewed, updated and kept current. To that end, annual progress reports have been published and, as was intended after every three years of implementation, a review of the Roadmap was completed in the summer of 2015. The purpose of the review was to consider whether the Roadmap's goals and general directions were still relevant, and whether there was need for significant adjustments to the action plan.



The review process included:

- Individual conversations, and a consultation session, with the Roadmap Liaison Committee - a volunteer committee of external public and private stakeholders;
- A review of current economic information and reports;
- Meetings with City Departments where there were alignments with the Roadmap's goals;
- Meetings with the Working Group - a committee of staff from three levels of government.

The review concluded that the goals and actions as defined in the Roadmap are still relevant. However, additions to the action plan were identified through the review process as outlined on the following pages.



ST. JOHN'S IS A LOCATION OF CHOICE FOR BUSINESS AND INVESTMENT

Business and investment activity bring employment, opportunities and innovation. Retaining and nurturing business is key to generating long-term, predictable economic activity. Our aim is to create an environment that enables business to grow, diversify and flourish in a city that celebrates business achievement.

ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
IMPROVING CITY PROCESSES AND BUSINESS RELATIONS			
1. Enhance business information/support through Access Centre.	Short	Lead	City departments
2. Explore options for business “pop-ups” centres and services.	Short	Partner	City departments, Business servicing agencies
3. Explore opportunities to better define land areas, zoning and infrastructure which could advance strategic industries identified in the Roadmap and Envision, Municipal Plan.	Ongoing	Lead	City departments
SUPPORTING GROWTH AND DIVERSIFICATION			
4. Seek opportunities to encourage start-up business initiatives.	Short	Partner	Start-up organizations
5. Connect with provincial innovation action plans.	Short	Partner	Government
RESEARCH, INFORMATION AND POLICY			
6. Develop demographic information to inform business development.	Short	Lead	Other municipalities, Business, Government
7. Identify opportunities for developing industry and business profiles.	Medium	Partner	Government, Industry associations

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ST. JOHN'S IS A MAGNETIC AND DESIRABLE CITY FOR NEWCOMERS AND YOUNG PROFESSIONALS

A qualified workforce is an essential ingredient for economic development and innovation. Securing a vibrant and healthy workforce necessitates a focused approach to both retaining and attracting professionals and skilled labour. Our aim is to nurture youth and young professionals (the Nexter generation), embrace diversity and promote St. John's as an ideal city in which to live and work.

ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
FOSTERING A VIBRANT COMMUNITY			
1. Promote and support cost effective and open events and activities.	Short	Lead	City departments
2. Continue delivering the Local Immigration Partnership initiative.	Ongoing	Lead	Community, Education, Government, Multicultural agencies
3. Explore options for publically available wireless technology.	Short	Lead	Business (service providers)
4. Explore the development of neighbourhood profiles, program and services in support of inclusive and welcoming communities.	Ongoing	Lead	City departments, Community, Neighbourhood associations
INFORMATION AND MARKETING			
5. Develop an attraction tool kit which would be useful in the attraction of employees, students.	Short	Influence	Governments

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ST. JOHN'S IS A GLOBAL LEADER IN OCEAN TECHNOLOGY AND A GLOBAL CENTRE FOR OFFSHORE ENERGY EXPERTISE

St. John's has a critical base of research facilities, companies and expertise related to offshore petroleum development and ocean engineering and technology. Local expertise in harsh environments has specific application to opportunities emerging in other jurisdictions including the North. The core competencies that have been developed locally can be leveraged and applied around the globe. Our aim is to promote and solidify St. John's position as a leader in ocean technology and as a centre for offshore energy expertise.

ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
MARKETING AND PROMOTION			
1. Continue to support positioning St. John's as the centre of ocean and arctic technology expertise with particular focus on key inbound conferences and business missions.	Ongoing	Partner	Governments, Industry associations
COMMUNICATION AND DIALOGUE			
2. Pursue, with neighbouring municipalities, opportunities to learn, explore and develop constructive approaches to maximizing benefits stemming from the petroleum industry.	Short	Lead	Other municipalities

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ST. JOHN'S IS A DESTINATION OF CHOICE FOR PEOPLE SEEKING AUTHENTIC VISITOR EXPERIENCES

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ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
DEVELOPING TOURISM PRODUCTS AND PROGRAMS			
1. Participate in and consider for St. John's, the outcomes from the North East Avalon Tourism Product Study currently in progress.	Ongoing	Partner	Government, Business/ industry
2. Consider niche areas for targeting industry-development focused conferences and events, e.g., genetics, food industry.	Medium	Partner	Destination St. John's, Governments, Industry, Post-secondary, Healthcare/research

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ACTIONS	TIME-FRAME ¹	CITY ROLE ²	POTENTIAL PARTNERS
DEVELOPING AUDIENCES			
1. Encourage the development of arts-culture-tourism familiarization program within the community to support better integrated awareness of cultural programming with tourism sector.	Short	Partner	Destination St. John's, Business/industry
INVESTING IN THE ARTS			
2. Continue to deliver city grant program to artists and arts organizations and consider, in reviews, the need for long term growth and development factors	Ongoing	Lead	

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“What is the city but the people.”

- Shakespeare



ST. JOHN'S

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