

Agenda

May 13, 2020

10 am – 12 pm

- Introductions
- Project Work Plan
- Initial Findings of Current Situation Assessment
- Engagement Process
- Next Steps
- Questions and Answers

Introductions

- Project Background
- City team
- Lions Gate consulting team
- Economic Development Task Force

Project Work Plan

Phase 1 Current Situation Assessment

- Socio-economic analysis
- Asset map
- Industry analysis
- Trends analysis
- Unique selling proposition
- SWOT analysis
- Performance measurement

Project Work Plan

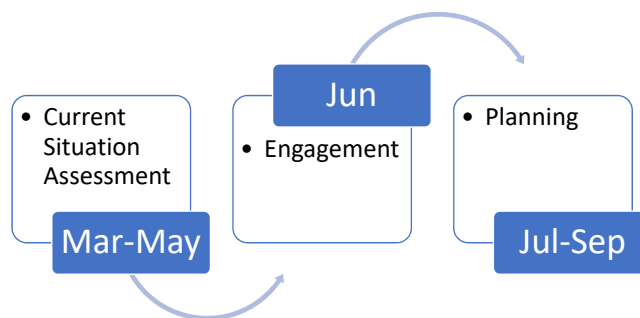
Phase 2 Engagement

- Business survey
- Community survey
- Focus groups
- Key informant interviews

Phase 3 Planning

- Vision workshop
- Planning workshop
- Draft strategy
- Final deliverables

Project Work Plan - Schedule

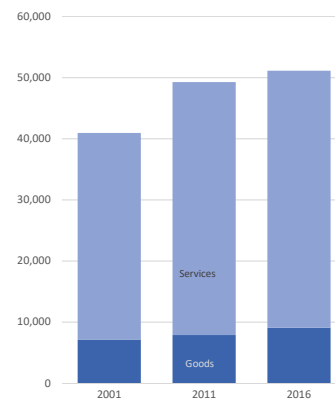


Initial Findings - Demography

- Population growth of 29% since 2001, higher than BC growth of 24%
- Projected population growth of 20% to 2041, another 23,000 people
- Historically, Nanaimo has had a slightly higher average age than BC, mainly due to greater proportions of retirees
- In 2015 personal incomes were marginally less than BC

Initial Findings – Labour Force

- Goods versus Services Labour Force
- Continued transition to services



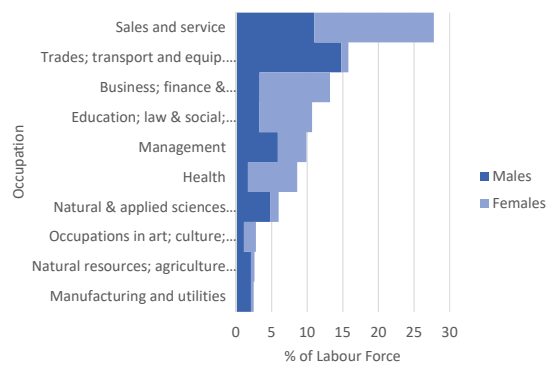
Initial Findings – Labour Force

- Top 10 Industries by Labour Force
- 9 of the 10 are services

	Femal e	Male	Total
Food services and drinking places	2,050	3,465	5,515
Professional, scientific and technical services	2,875	2,485	5,360
Educational services	1,630	3,615	5,245
Specialty trade contractors	3,930	515	4,445
Ambulatory health care services	890	3,550	4,440
Administrative and support services	2,265	1,835	4,100
Food and beverage stores	1,215	1,560	2,775
Construction of buildings	2,215	325	2,535
Hospitals	470	1,955	2,425
Nursing and residential care facilities	360	1,710	2,070

Initial Findings – Labour Force

- Top occupations
- Again, services dominate

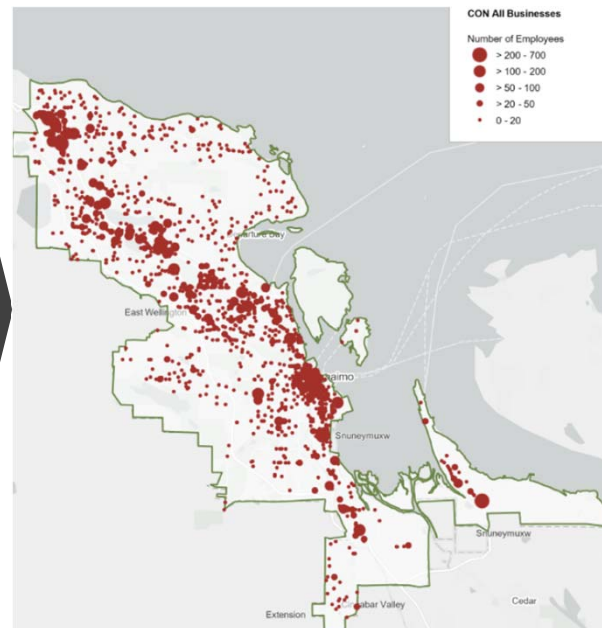


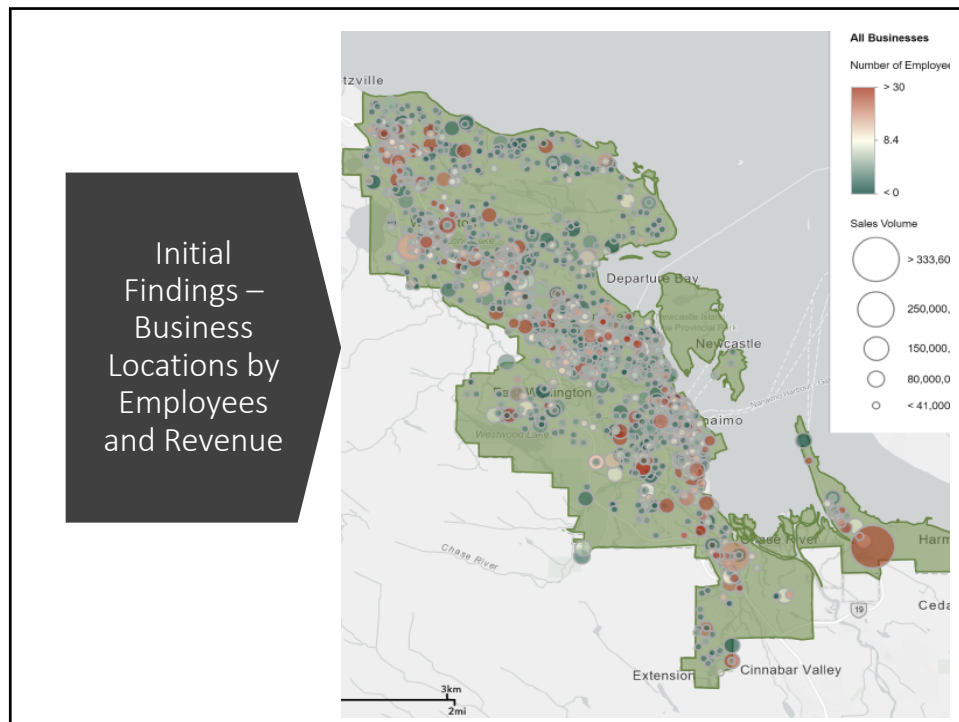
Initial Findings – Labour Force

- Industries with high employment concentration in Nanaimo
- Transportation, primary and manufacturing dominate
- Oil & Gas is an anomaly

	2001	2011	2016
Water transportation	3.96	4.86	3.71
Fishing, hunting and trapping	3.03	2.69	3.58
Leather and allied product manufacturing	-	-	2.13
Pet. & petroleum products merchant wholesalers	0.76	1.83	2.02
Paper manufacturing	1.96	1.73	1.92
Nursing and residential care facilities	1.17	1.67	1.61
Oil and gas extraction	0.48	0.85	1.60
Forestry and logging	1.25	1.51	1.55
Building mat. & garden equip. & supplies dealers	1.25	1.47	1.49
General merchandise stores	1.58	1.28	1.45

Initial Findings – Business Locations by Employees





Initial Findings – Key Trends

- Demographic change
- Shift to services
- Decline of resource industries
- Environmental, climate change issues
- Networking and communications
- Geographic winners and losers
- Public assets as economic drivers

Engagement Process - Surveys

- Draft surveys by May 15
- Business and Community
- Delivery through Lanark in May-June
- TBD:
 - Target lists
 - Distribution methods: email?, website?, social media?

Engagement Process – Interviews

- Planned for May-July
- Informal, issue focused, not standard question sets
- TBD:
 - Master contact list?
 - To be used for focus group recruitment as well
 - Name, org, email, tel, area of interest

Engagement Process – EDTF Interviews

- What is the City's unique selling proposition?
- Combination of research and interviews
- TBD:
 - Looking for select interviews with EDTF members
 - Volunteers?

Engagement Process – Focus Groups

- Planned for June, 6 sessions, 6-8 participants each
- TBD:
 - How to deliver?
 - Preference is not for digital approach, difficult to generate effective dialogue
 - Prefer face-to-face; how to navigate social distancing?
 - Where?
 - When?
 - Themes?
 - Targets/Invitees?
 - Logistics?
 - Invites and recruitment

Next Steps

- Volunteers for USP interviews
- Master contact list
- Focus group logistics and delivery
- Surveys launch
- Proceed to draft Current Situation Assessment

Q&A