



Louisbourg, Nova Scotia Retail Market Assessment

Cape Breton Regional Municipality

May 2021



CAPE BRETON
REGIONAL MUNICIPALITY

develop
NOVA SCOTIA

Louisbourg Retail Market Assessment



This document serves as a companion document to the Retail Market Analysis for the Cape Breton Regional Municipality.

Prepared by FBM for:



CAPE BRETON
REGIONAL MUNICIPALITY

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The Past is Present

*Electric vehicle charging stations
at the Fortress of Louisbourg
National Historic Site, 2021*

1 INTRODUCTION

Fowler Bauld & Mitchell Ltd. ("FBM") was commissioned by the Cape Breton Partnership and Develop Nova Scotia to prepare a Retail Market Assessment for the town of Louisbourg. The study was carried out over the period of January to March 2021, with on-the-ground fieldwork conducted in late February 2021 and a final report delivered in May 2021.

The objective of this study is to quantify and document the resident and visitor retail markets and estimate the potential retail opportunity in the community for attracting and retaining spending and businesses. Retail spending and inventory, was estimated to identify gaps in the current provision of shops and services to the approximate year 2029.

Primary reference data for this report was obtained from Manifold Data Mining Inc, Develop Nova Scotia, Cape Breton Partnership and FBM. Additional statistical information for this study was kindly provided by National Parks Canada specific to the Fortress of Louisbourg's past five year visitor history, including retail and food & beverage revenues.

FBM does not warrant that any estimates contained within the study will be achieved over the identified time horizons, but that they have been prepared conscientiously and objectively on the basis of information obtained during the course of this study.

This analysis was conducted by FBM as an objective and independent party. As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed permission of the Cape Breton Partnership, Develop Nova Scotia or FBM.



Louisbourg Retail Market Assessment

2 TOURISM OVERVIEW

In recent years, the top Cape Breton visitor experiences have been the Cabot Trail, coastal sightseeing, hiking, Cape Breton music, and the Fortress of Louisbourg National Historic Site (2015 & 2017 Cape Breton Travel Intentions and Conversion Surveys). The site is comprised of the Royal Battery, Wolfe's Landing, and Fortress itself, which is located 5km south of the modern-day town of Louisbourg. During the peak summer season, visitors to the Historic Site are shuttled to the Fortress from the Parks Canada visitor center just outside of town. While in the partially reconstructed French colonial town, visitors interact with costumed staff who bring to life the everyday sights and sounds of the 18th century. The Fortresses boasts three period restaurants, a bakery, a coffee shop, and two gift boutiques. Visitor and resident programming provided by Parks Canada and the Fortress of Louisbourg Association (respectively) each contribute to the engaging and authentic atmosphere of the Fort.

The Fortress saw 87,174 visitors in 2019 and 95,473 in 2018. The average number of annual visitors between 2015 and 2019 was 90,159 (excluding 2017). Paid visitors numbered 74,089 for 2019 and 81,606 for 2018, with a median of 81,302 paid visitors per season between 2015 and 2019.

The Fortress attracts first time and repeat visitors from across Canada, the United States, and the world each year. Visitors from Ontario, Quebec, and Nova Scotia were the most frequent visitors over the past five years. Paid visitors tend to be adults and adults with children (average 51.8% and 19.6% respectively for 2015-2019). With the pandemic and subsequent operating restrictions, the Fortress saw a significant decrease in visitors, and the forecast will be for a recovery over the next few years to previous levels.

Figure 1: Louisbourg Retail Trade Area



Visitors to the Louisbourg area may also enjoy local attractions such as the Oceans of Opportunity Marine Science and Heritage Centre (O2), the Louisbourg Playhouse, the Sydney & Louisbourg Railway Historical Society, Kennington Cove Beach Municipal Park, local walking trails, and the Louisbourg Lighthouse.

Outlying Communities - Catalone & Albert Ridge

While the crux of this study examines the retail within the Louisbourg community, there are additional pockets of local retail in outlying communities along the Louisbourg Hwy 22 such as Albert Ridge and Catalone. The retail includes fuel stations, convenience stores, diners and specialty shops like an artisan glass blower and outdoor watersports rentals. Though they don't represent a significant impact on retail, they do illustrate the importance in capturing visitor and local spending. For the purposes of this study, they are acknowledged for the role they play along the primary route in and out of Louisbourg, but they are not the core focus of the study itself.

Opportunities

Encouraging visitors to spend time in and around Louisbourg for 2-3 hours longer can have a significant impact on tourism spending in the area. The addition of 14 free electric vehicle charging stations at the Fortress of Louisbourg McLennan Centre (6) and the visitor center (8 planned) creates an organic reason for visitors to stay longer. As visitors charge their vehicles, they may also choose to visit a nearby restaurant or store to pass the time. Current plans for the Louisbourg Centre and Waterfront Park seek to encourage visitors to stay by creating a central space for services, experiences and programming for the Fortress and the town.

Visitors arriving by small cruise ships to Louisbourg harbour may also find this new attraction to be of interest given its proximity to the waterfront. For those arriving by land, the addition of the charging stations may also encourage environmentally conscious visitors to the area as part of Parks Canada's efforts to become a leader in sustainable tourism. Recent funding for new and used electric vehicles, plug-in hybrids and e-bikes by the Province of Nova Scotia (in addition to Federal funding) are also encouraging. Popular destinations like the Fortress will likely see increased visitation as electric vehicles become more affordable and charging stations more accessible.

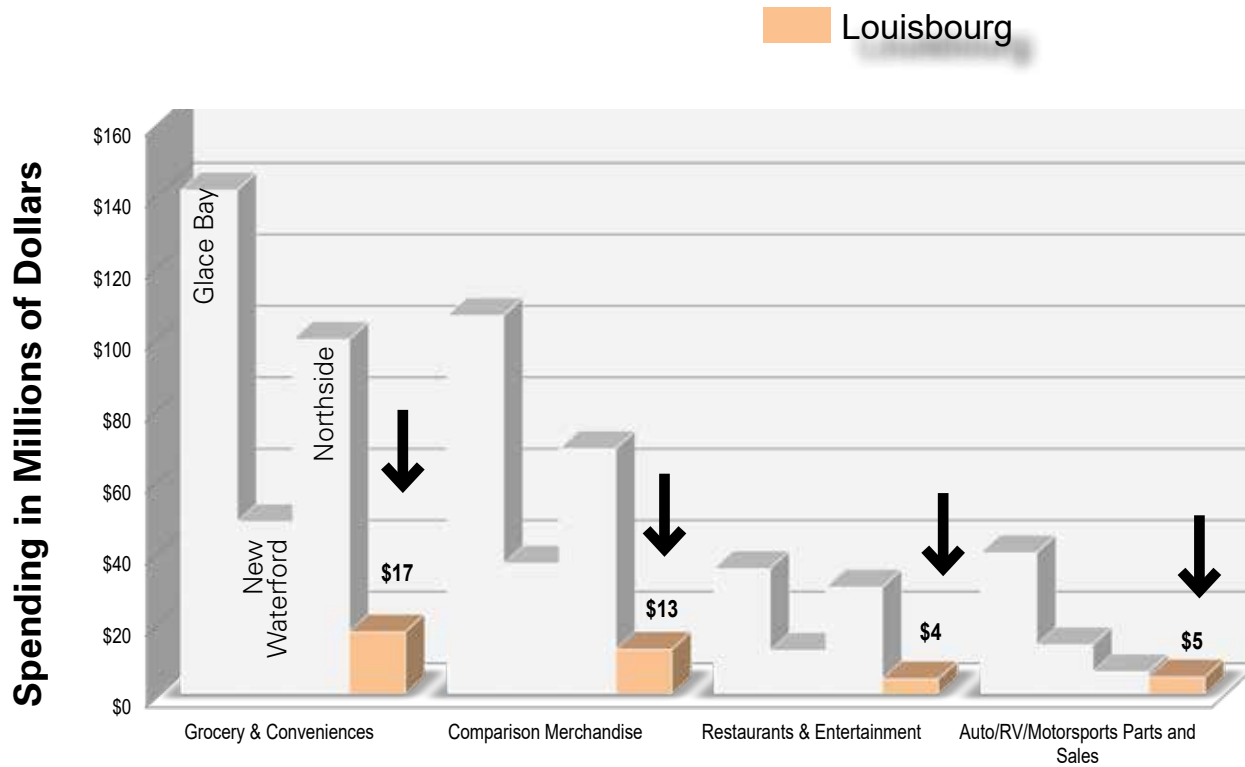
3 TRADE AREA PROFILE

The Trade Area for Louisbourg is presented in **Figure 1**. Estimated for the end of year 2019, the Louisbourg Trade Area population is 2,716. Using the province as a benchmark, the population in this Trade Areas also tends to be older and with a lower income. As is the challenge for many smaller Nova Scotian communities, the population in these areas is anticipated to decline by just under 1% per year over the next two years.



Figure 2: Primary Trade Area Retail Spending Summary 2019 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)



2019

Table 1: Primary Trade Area (PTA) Retail Spending 2019 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category	2019	
	LOUISBOURG PTA ANNUAL Household Retail Spending	LOUISBOURG PTA ANNUAL Aggregate Retail Spending
Grocery & Convenience	\$9,164	\$11,451,828
Pharmacy	\$1,014	\$1,266,646
Alcohol & Tobacco	\$1,470	\$1,836,534
Personal Services	\$2,246	\$2,806,761
Fashion & Accessories	\$2,296	\$2,868,753
Jewelry	\$95	\$118,739
Health & Beauty	\$606	\$757,871
Home Furniture & Décor	\$879	\$1,098,580
Appliances & Electronics	\$1,264	\$1,579,413
Home Improvement & Gardening	\$2,635	\$3,292,977
Books & Media	\$490	\$612,056
Sporting Goods	\$317	\$396,458
Toys & Hobbies	\$302	\$377,789
Specialty Retail	\$1,139	\$1,423,195
Quick Service F&B	\$1,372	\$1,714,534
Restaurants & Pubs	\$1,563	\$1,953,022
Arts & Entertainment	\$118	\$147,548
Fitness & Leisure	\$330	\$412,486
Auto Parts & Accessories	\$532	\$664,581
Auto/RV/Motorsports Dealership	\$3,298	\$4,121,085
TOTAL CATEGORIES	\$31,130.4	\$38,900,855
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$27,300.7	\$34,115,189

However, this forecast represents a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline. However, even if growth was positive, it would not likely be at a rate significant enough to make a large difference to the overall retail outlook. Further details on Louisbourg Demographics is provided in **Appendix A**.

4 RETAIL SPENDING SUMMARY

Resident Trade Area Spending: Detailed information of retail spending within each Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2019 year end data.

Table 2: Louisbourg Fortress Annual Visitation & Retail Spending

(Source: Parks Canada and FBM)

Fortress Louisbourg Visitors & Revenues	2015	2016	2017	2018	2019	5-year Average (excl 2017)
Total Visitation	83,859	94,130	140,469	95,473	87,174	90,159
Paid Entries	79703	89809	FREE	81606	74089	81,302
Free Entries	4156	5041	FREE	13867	13085	9,037
Estimated Revenue (@ \$7 pp)	\$ 557,921	\$ 628,663		\$ 571,242	\$ 518,623	\$ 569,112
Gift Shop Sales	\$ 219,198	\$ 249,573	\$ 322,339	\$ 260,440	\$ 242,934	\$ 243,036
Restaurant Sales	\$ 436,789	\$ 476,965	\$ 585,530	\$ 494,432	\$ 494,100	\$ 475,572
Bakeries Sales	\$ 46,785	\$ 53,114	\$ 74,630	\$ 53,425	\$ 46,589	\$ 49,978
Gift Shop Floor Area	1,330	1,330	1,330	1,330	1,330	1,330
Gift Shop Sales Per Sq. Ft.	\$ 165	\$ 188	\$ 242	\$ 196	\$ 183	\$ 183
Restaurant Floor Area (est.)	1,500	1,500	1,500	1,500	1,500	1,500
Gift Shop Sales Per Sq. Ft.	\$ 291	\$ 318	\$ 390	\$ 330	\$ 329	\$ 317
Bakeries Floor Area (est.)	250	250	250	250	250	250
Gift Shop Sales Per Sq. Ft.	\$ 187	\$ 212	\$ 299	\$ 214	\$ 186	\$ 200

NOTE: In 2017 Entries were Free for all visitors

Having established the respective Trade Area boundaries, population and demographic profile, the size of the retail market and its anticipated growth was projected using retail spending data from Manifold Data Mining.

Each of the major three categories of spending (Convenience, Comparison and Leisure) was assessed at a detailed category-by-category level then aggregated into major categories as shown in **Figure 2** for the Louisbourg Trade Area.

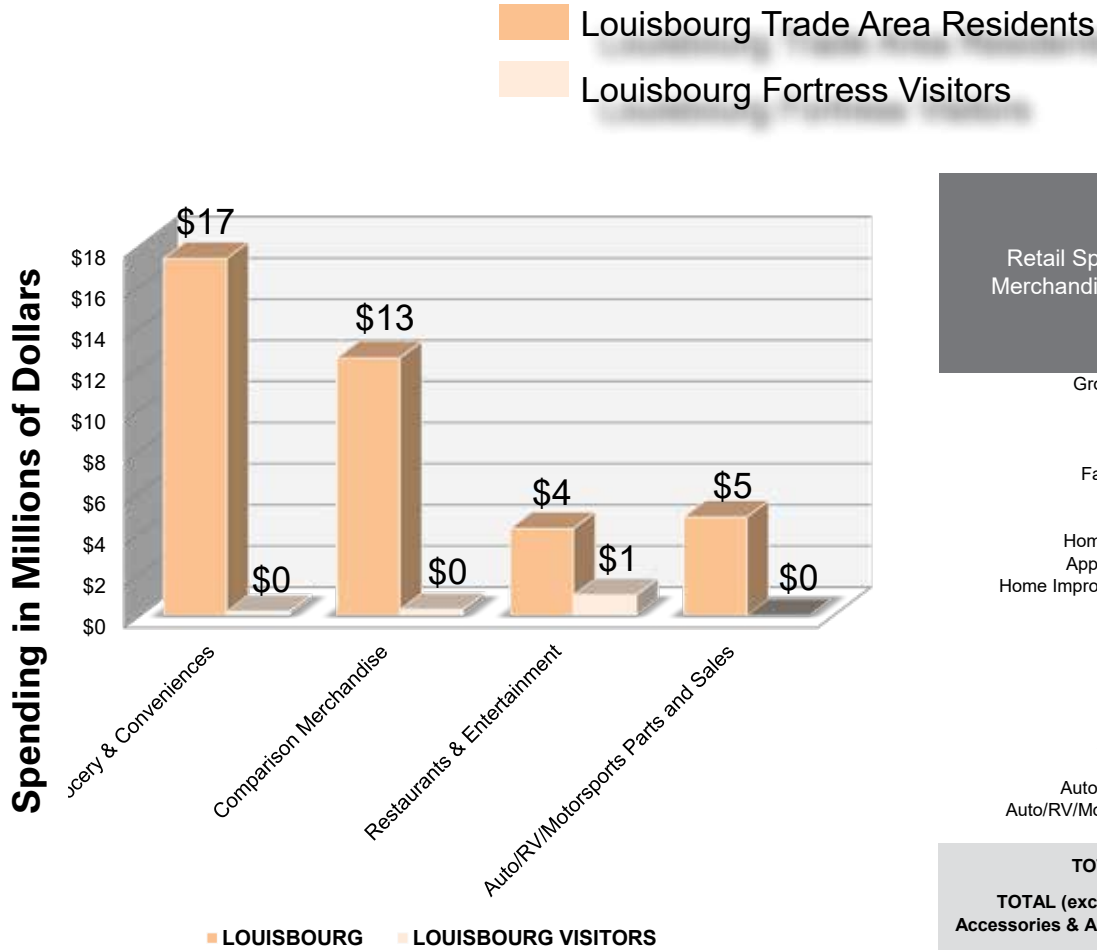
The Retail Trade Area spending for Louisbourg's Trade Area residents is estimated at \$39 million (2019 year-end estimate), as illustrated in **Table 1**. When excluding automotive categories this figure comes in at \$34 million.

Fortress Visitor Spending: Louisbourg also benefits from the presence of the nearby Fortress, which is a part of Parks Canada. As such it generates a lot of annual visitation, which itself is a stimulus for on-site spending as well as residual spending in town. With improvements planned for the Louisbourg waterfront that will include relocation of the Fortress Visitor Centre into the main commercial area of Louisbourg, it can be expected that opportunities to capture more visitor spending could become available.

Over the past 5 years, visitation to the Fortress has averaged over 90,000 visitors per annum (refer to **Table 2**). This visitation has resulted in an average annual retail revenue attributable to the on-site gift shops, restaurant and bakery of approximately \$768,586 per year. This works out to approximately \$8.52 per visitor. Including admissions revenue it is estimated that the average visitor to Louisbourg Fortress spends in the order of \$15 on retail and leisure (refer to **Figure 3 & Table 3**).

**Figure 3: Primary Trade Area Resident AND Visitor Spending
Summary 2019 Y/E estimate**

(Source: Manifold Data Mining Inc., Parks Canada and FBM)



**Table 3: Primary Trade Area (PTA) Resident AND Visitor
Retail Spending 2019 Y/E estimate**

(Source: Manifold Data Mining Inc., Parks Canada and FBM)

Retail Spending by Merchandise Category	2019		2019		TOTAL TRADE AREA & VISITOR ANNUAL Retail Spending
	LOUISBOURG PTA ANNUAL Household Retail Spending	LOUISBOURG PTA ANNUAL Aggregate Retail Spending	LOUISBOURG VISITOR (per Visitor assuming duration of 1 day)	LOUISBOURG VISITOR ANNUAL Aggregate Retail Spending	
Grocery & Convenience	\$9,164	\$11,451,828	\$2.0	\$200,000	\$11,651,828
Pharmacy	\$1,014	\$1,266,646	\$0.0	\$0	\$1,266,646
Alcohol & Tobacco	\$1,470	\$1,836,534	\$0.0	\$0	\$1,836,534
Personal Services	\$2,246	\$2,806,761	\$0.0	\$0	\$2,806,761
Fashion & Accessories	\$2,296	\$2,868,753	\$0.0	\$0	\$2,868,753
Jewelry	\$95	\$118,739	\$0.0	\$0	\$118,739
Health & Beauty	\$606	\$757,871	\$0.0	\$0	\$757,871
Home Furniture & Décor	\$879	\$1,098,580	\$0.0	\$0	\$1,098,580
Appliances & Electronics	\$1,264	\$1,579,413	\$0.0	\$0	\$1,579,413
Home Improvement & Gardening	\$2,635	\$3,292,977	\$0.0	\$0	\$3,292,977
Books & Media	\$490	\$612,056	\$0.0	\$0	\$612,056
Sporting Goods	\$317	\$396,458	\$0.0	\$0	\$396,458
Toys & Hobbies	\$302	\$377,789	\$0.0	\$0	\$377,789
Specialty Retail	\$1,139	\$1,423,195	\$3.0	\$300,000	\$1,723,195
Quick Service F&B	\$1,372	\$1,714,534	\$1.0	\$100,000	\$1,814,534
Restaurants & Pubs	\$1,563	\$1,953,022	\$6.0	\$600,000	\$2,553,022
Arts & Entertainment	\$118	\$147,548	\$3.0	\$300,000	\$447,548
Fitness & Leisure	\$330	\$412,486	\$0.0	\$0	\$412,486
Auto Parts & Accessories	\$532	\$664,581	\$0.0	\$0	\$664,581
Auto/RV/Motorsports Dealership	\$3,298	\$4,121,085	\$0.0	\$0	\$4,121,085
Auto Fuel	\$1,577	\$1,971,185	\$0.0	\$0	\$1,971,185
TOTAL CATEGORIES	\$31,130	\$38,900,855	\$15.0	\$1,500,000	\$42,372,040
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$27,301	\$34,115,189	\$15.0	\$1,500,000	\$37,586,374

2019

For the purposes of this analysis, we increased the annual visitation to Louisbourg by 10,000 to a total of 100,000 on average per year. This reflects visitors that may come to Louisbourg for other reasons, even though as has been noted “there are no accidental tourists in Louisbourg”.

The resulting spending attributed to Louisbourg visitors is therefore estimated at \$1.5 million. When combined with the local trade area resident spending, the total trade area retail spending in Louisbourg is estimated at just under \$37.6 million (2019 Y/E estimate).

5 RETAIL INVENTORY

Louisbourg is an authentic tourism, fishing and fish-processing industry oriented community built around a working harbour located within an approximate 25-35 minute drive time of Sydney’s Uptown, Midtown and Downtown nodes (summarized in **Table 4** and detailed in **Appendix B**).

Unlike Glace Bay and New Waterford, Louisbourg does not serve the majority of its day-to-day customer base needs such as grocery, gas and pharmacy (refer to **Table 5 & Figure 4**). The shops and services in Louisbourg tend to be tourism focused with accommodations and industry being common building uses.

TABLE 4: Retail Inventory Summary

(Source: FBM)

Nodes	Total Ground Level Streetfront Inventory (sf)	Total Occupied Retail Only Inventory (sf)	Vacant (sf)	Vacant of Total Ground Level Streetfront (%)
Downtown Sydney	374,697	229,196	72,930	19.5%
Midtown Sydney	289,458	248,749	15,635	5.4%
Uptown Sydney	1,190,145	1,107,389	73,170	6.1%
Sydney River	508,545	428,945	51,300	10.1%
Northside	412,939	373,412	32,327	7.8%
Glace Bay	363,250	324,900	38,350	10.6%
New Waterford	113,800	100,000	5,000	4.4%
Louisbourg	56,853	33,843	14,010	24.6%

Table 5: Louisbourg Retail Inventory Summary

(Source: FBM)

MERCHANDISE CATEGORY	GROUND LEVEL STREETFRONT INVENTORY SQ. FT.
JEWELRY	0
TOYS & HOBBIES	0
AUTO PARTS & ACCESSORIES	0
HOME FURNISHINGS & DÉCOR	0
HEALTH & BEAUTY	0
ARTS & ENTERTAINMENT	6,000
SPORTING GOODS & OUTDOOR RECREATION	0
BOOKS & MULTI-MEDIA	0
HOME ELECTRONICS & APPLIANCES	0
FASHION & FOOTWEAR	0
ALCOHOL & TOBACCO	4,750
PERSONAL SERVICE	750
SPECIALTY RETAIL	3,080
AUTO/RV/MOTORSPORTS DEALERSHIP	0
LIMITED SERVICE F&B	3,550
HOME IMPROVEMENT & GARDENING	0
AUTO SERVICE	0
FULL SERVICE F&B	13,813
FITNESS & LEISURE	0
PROFESSIONAL & FINANCIAL SERVICE	2,000
GROCERY, CONVENIENCE & SPECIALTY FOODS	1,900
PHARMACY	0
VACANT	14,010
OTHER MISCELLANEOUS RETAIL	7,000
TOTAL	56,853

Retail Floorspace (excluding Professional, Finance, Public Service, Auto Service & Vacant) **33,843**

Figure 4: Louisbourg Retail Inventory Summary (excludes outlying miscellaneous retail in Catelone or home-based retail operations)

(Source: FBM)



Figure 5: Louisbourg Retail Ground Level “Streetfront” Inventory

(Source: FBM)



Figure 6: Representative Retail Imagery - Louisbourg

(Source: FBM, February 2021)

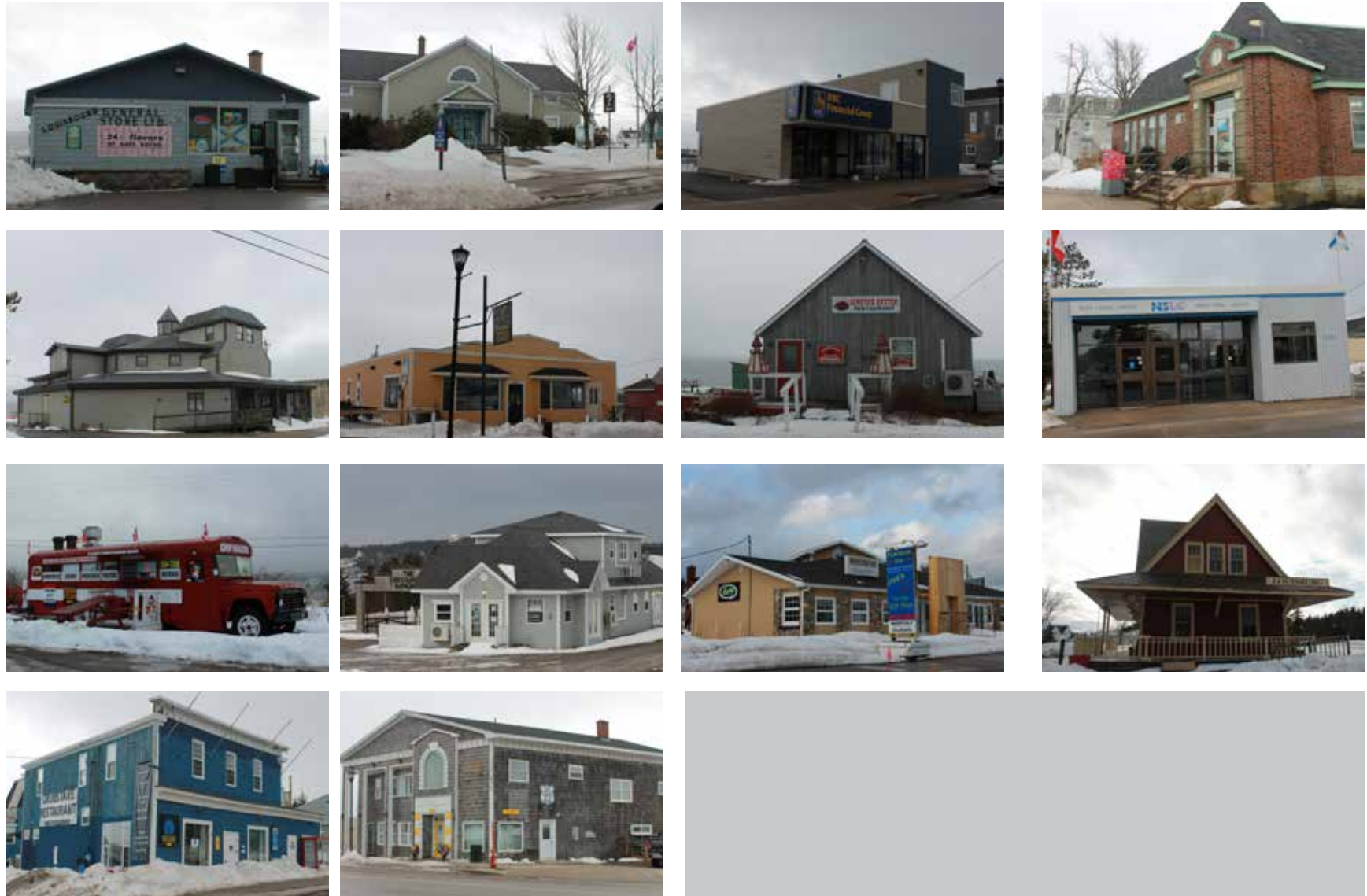


Figure 7: Vacant buildings or Opportunity Buildings - Louisbourg

(Source: FBM, February 2021)



Louisbourg’s retail inventory is estimated at approximately 33,843 sf, the largest share of which is full service restaurants like Lobster Kettle, Beggars Banquet and Hwy 22 (refer to **Figure 5 & 6**). The resulting per capita ratio for Louisbourg, based on the localized trade area it serves, is estimated at 12.4 sf/capita, which is appropriate for the needs of a community of that size. The biggest challenge for Louisbourg is the approximate 14,000 sf of commercially-viable space (refer to **Figure 7**). As the Louisbourg Centre comes to fruition, it should be a goal of the community to fill vacancies with uses that could benefit from the proximity of more visitor volume.

6 RETAIL VACANCY & OPPORTUNITY BUILDINGS

Louisbourg’s Main Street has the core foundation for walkability and for business attraction, although the seasonality of visitation and smaller permanent resident trade area often results in challenges for businesses that is manifest in vacant buildings or sub-optimal uses.

The imagery presented in **Figure 7** illustrates a number of the vacant retail spaces currently on or adjacent to Main Street. Additionally, there are images of sites that may not be vacant, but do represent opportunity buildings for potential new or destination uses. Specific vacancies are documented in **Appendix B**.

The current vacancy in Louisbourg is currently estimated at 14,000 sf, which is a large figure relative to the community’s size. This figure does not include the former Elementary School site, which should be looked at for future consolidation of community uses and amenities in one location with excellent walkability and connection to the Main Street.

In particular, the former fire station building which currently houses CBRM public works trucks and offices could have a very strong use as a distillery or retail use, with excellent street exposure. In this scenario, the existing uses could easily be relocated to the rear of the school site as well as including office uses inside the school.

Although not shown in **Figure 7**, there are also many smaller vacant properties that front Main Street, which themselves could be screened or temporarily animated with pocket parks or public arts programs.

In the face of low population growth forecasts, **demand in Louisbourg is not forecast to be significant. However, future opportunities are more importantly predicated on increasing the retention and attraction of local visitor spending.** Whatever demand is present could and should be positioned to locate within existing vacancies along Main Street and small infill lots along or adjacent to Main Street and the future new Welcome Centre. The goal for Louisbourg should be to have occupied buildings with business that are viable year round or at a minimum two-thirds of the year.

7 RETAIL DEMAND SUMMARY

Quantifying the future potential retail demand for Louisbourg utilized a more general methodology. Rather than examining the market capture by retail spending, the methodology took 2 approaches and then created an average of the two to determine the approximate demand. Additionally, the demand for this community looks toward a 10-year horizon to the year 2029. Detailed category spending for the Louisbourg trade area including Visitors is documented in **Table 3**.

Inventory Market Share Methodology

The first methodology, as shown in **Table 6** takes the current inventory estimates and divides this into the demand based on a 100% market share capture to determine the current market share of inventory. In the case of Louisbourg, if 100% of the trade area spending were captured, approximately 271,000 sf of space would be supported. This is not realistic, but from this figure we can calculate that the current Louisbourg inventory of 33,843 sf accounts for a market share of inventory of 12.5%.

Based on this calculated “current market by inventory” estimate a “target potential market share” is applied. The resulting difference between the “target” and the “current” inventory equates to an “unmet potential” figure, which may also be referred to as “residual demand”.

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 6** recognizes the “current calculated per capita floorspace” and applies a “target per capita” floorspace against the population by 2029.

Each of these approaches is then averaged to determine the “average of unmet potential” for both approaches.

In the case of Louisbourg, the inventory market share methodology yields a demand estimate of 13,530 sf, while the per capita floorspace methodology yields a floorspace demand of 6,897 sf.

As a result, the combined average demand in Louisbourg estimated at 10,214 sf, which suggests a potential opportunity for additional neighbourhood-scale shops and services, though much of this could or should be factored into existing available spaces along Main Street.

Demand in Louisbourg is not significant and most importantly is based on increasing the retention of local and visitor spending in the face of current population forecasts which at present do not exhibit growth attributes. In many cases, demand is often premised on population growth, but in markets where population is declining and per capita ratios are low, it is incumbent on communities to find ways to ensure that the trade area residents support and shop local for the majority of their needs. The reality for Louisbourg, as it is for other smaller, rural communities in the CBRM, Sydney and in particular Uptown will be a strong retail spending destination.

Table 6: Louisbourg Demand Forecast Estimates 2030

(Source: FBM)

		LOUISBOURG DEMAND ESTIMATE (10-year target to 2029)
Inventory Market Share Methodology	Current inventory (sf)	33,843
	Current market share by inventory	12.5%
	Target potential market share	17.5% 47,373
	Unmet Potential (sf)	13,530
Per Capita Floorspace Methodology	Current per capita floorspace est (sf/capita)	12.4
	Target per capita (sf/capita)	15.0
	Target retail based on per capita (sf)	40,740
	Unmet potential of per capita (sf)	6,897
	Avg of unmet potential approaches (sf)	10,214

Summary

8 SUMMARY & KEY FINDINGS

Louisbourg could support an additional 10,000 sf, but most of that could or should be accommodated in existing vacancies along Main Street. Louisbourg does not attract “accidental tourists”. It does however have the opportunity to better capture visitors who are not only drawn to the Fortress on arrival but who must pass on their way back out of town, since Louisbourg is the end of the road. Louisbourg, as a visitor destination should therefore have two major objectives:

1. Create more activities in shoulder and off-seasons to attract more seasonal visitor balance and resulting retailer stability.
2. Create additional reasons for visitors to spend an extra two to three hours in the town outside of their visit to the Fortress. The relocation of the Visitor Centre to the waterfront is a major step in this direction. Another supporting idea is the introduction of EV charging stations in the Main Street area.
3. Support local businesses to take advantage of their unique brand as “authentic Louisbourg businesses” to grow their opportunities outside of the local trade area, either online or by establishing brand loyalty with customers visiting the fortress for repeat business.

The combination of these two goals will be a contributing factor to businesses garnering slightly more market share of the resident and visitor spending.

Also, since it is often said that visitors like to frequent where the locals frequent, it is incumbent upon marketing efforts to create an environment to which locals are drawn more frequently than they are today.

This includes dramatically improving the local storefront signage and overall wayfinding in the Main Street.

Specifically from the analysis, the following key points are shared for consideration as it relates to the business retention, expansion and attraction, as well as placemaking specific to Louisbourg:

- Even if retail demand is minimal, the creativity of entrepreneurs must not be stifled, whereby opportunities still exist to strengthen their respective core “main street” areas in existing spaces.
- Vacancies need to be prioritized which requires constant “outreach & planning” through workshops with prospective tenants, landlords and brokerage community.
- Work at developing, not recruiting businesses where ideas are formulated and entrepreneurs are sought to execute the ideas. In other words connect the concept to those who can capitalize. This includes creating entrepreneurial bootcamps for home-based businesses as well as others with prospective business concepts.
- Improved storefront/business signage and wayfinding should be prioritized and consider the use of facade improvement grants for businesses. This will assist with better identifying businesses along Main Street as well as connections to/from the waterfront as the Waterfront Visitor Experience Enhancement Strategy becomes a reality.
- Establish a local program to animate vacant lots along main street and promote local public art along blank walls or flanking walls of buildings or alleys.

- Further develop destination marketing strategies to create opportunities for shoulder and off-season visitor activities, such as storm watching and build upon growing initiatives that include mountain biking and cycling tours.
- Work with the local government to consolidate and shift around public uses from commercially valuable locations to the former elementary school, which should become a community focal hub.
- Encourage the establishment of authentic experiences connected to Louisbourg’s modern industries such as Louisbourg Seafoods’ branded fish and chips.
- Encourage a Louisbourg community marketing campaign as being a 30 minute getaway from Sydney.
- Embrace the power of authentic rural destination marketing and support organizations such as the Fortress Louisbourg Association, the Port of Sydney Corporation and Destination Cape Breton Association to collaborate to grow the day-trip or overnight appeal of Louisbourg to CBRM residents

The following Table 7 provides a sampling of some business typologies that could fit the mold of an authentic Louisbourg experience that would capture the attention of locals and visitors.

Figure 8: Representative Imagery of Storefront Signage, Vacant Lot Temporary Animation and Wayfinding Signage

(Source: Kieron Hunt)

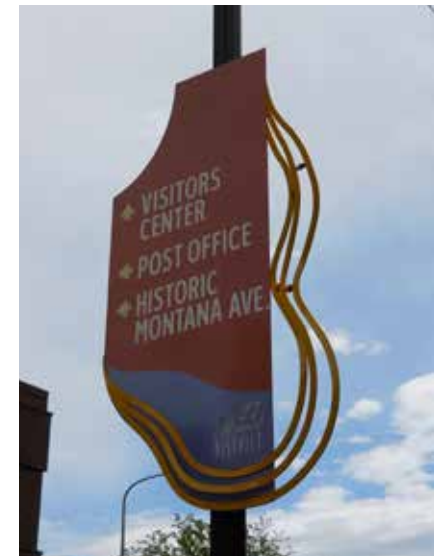


Table 7: Louisbourg Tenant Prospect Typologies

(Source: FBM)

Business Concept/Type	Retail Category	Local or Brand	Example or Comparable Tenant	Approx Size Range (min sf)	Approx Size Range (max sf)
Glass Blowing Gallery & Restaurant	Arts & Full Service F&B	Local	Simon Pearce Gallery	750	1,250
Recycled / Upcycled Fashions	Fashion	Local/Branded	Frenchy's, Jane's Again	750	1,250
Nova Scotian Distillery Tasting Bar	Full Service F&B	Local	Glenora Distillery Tasting Bar	1,000	1,500
Micro Brewery	Full Service F&B	Local	Copper Bar & Grill	1,250	1,750
Louisbourg Seafood Fish & Chip Barge	Full Service F&B	Local	Pajo's (Steveston)	1,000	2,000
Ethnic Fare - Tapas Lounge	Full Service F&B	Local		1,000	1,500
Cider House	Full Service F&B	Local	Annapolis, Bulwark	1,250	2,500
Stormwatching Teahouse Bistro	Full Service F&B	Local		750	1,250
Specialty Destination Pastries & Breads	Grocery & Specialty Foods	Local	Arch & Po, La Have Bakery	500	1,000
Delicatessen / Butcher	Grocery & Specialty Foods	Local		500	1,000
Food Trucks (quasi-permanent)	Limited Service F&B	Local		300	500
Community Kitchen	Personal Service	Local		1,500	2,500
Co-working Office & Café	Professional Services	Local	Work Evolved MashUp Lab	1,250	2,000
Pop-Up Shops (home-based incubator)	Specialty Retail	Local		250	500
Hiking & Trail Boutique	Sporting Goods & Outerwear	Local	The Trail Shop	750	1,000
Recharge Café and Magazines (with EV stations)	Limited Service F&B	Local		500	1,250
Cycling Café & Outdoor Sports Rentals	Sporting Goods & Outdoor Recreation	Local	Frameworks, Bike & Bean	500	1,500

Index	Description	Colour
180 or greater	Extremely High	
110 to 179	High	
90 to 109	Similar	
50 to 89	Lower	
Less than 50	Extremely Low	

Demographics - Summary Report

Attribute	Benchmark Nova Scotia (PR,NS)		Louisbourg TA		
	value	percent	value	percent	index
SUMMARY					
Total population	961,691		2,716		
Total population age 15 and over	826,356		2,474		
Total number of private households	427,631		1,250		
Average number of persons in private households	2.18		2.16		99
Total population in private households	933,509		2,702		
Total number of census families in private households	283,641		913		
Average number of persons per census family	2.68		2.53		94
Total population in families	759,722		2,306		
Total number of labour force age 15 and over	456,078		1,122		
Land area (square km)	52,942		392		
Inhabited area (square km)			270		
POPULATION AGE					
Population age 0-14	135,335	14.07%	241	8.89%	63
Population age 15-24	109,197	11.35%	296	10.89%	96
Population age 25-34	119,740	12.45%	234	8.61%	69
Population age 35-44	112,957	11.75%	268	9.89%	84
Population age 45-54	124,174	12.91%	332	12.21%	95
Population age 55-64	152,433	15.85%	546	20.10%	127
Population age 65+	207,856	21.61%	799	29.41%	136
DWELLING					
Total number of occupied private dwellings	427,631		1,250		
Average dwelling value \$	\$282,764		\$202,464		72
Home owners	292,184	68.33%	1,127	90.20%	132
Home tenants	132,959	31.09%	122	9.80%	32
Band housing	2,489	0.58%	0	0.00%	0
HOUSEHOLDS					
One-family households	276,798	64.73%	848	67.87%	105

Index	Description	Colour
180 or greater	Extremely High	
110 to 179	High	
90 to 109	Similar	
50 to 89	Lower	
Less than 50	Extremely Low	

Demographics - Summary Report

Attribute	Benchmark Nova Scotia (PR,NS)		Louisbourg TA		
	value	percent	value	percent	index
INCOME					
Average family income \$	\$108,245		\$103,682		96
Average household income \$	\$87,384		\$89,736		103
Average income population age 15 and over (\$)	\$47,413		\$45,436		96
Population with income Under \$10,000 (including loss)	93,556	11.32%	221	8.92%	79
Population with income \$10,000 to \$19,999	135,740	16.43%	377	15.24%	93
Population with income \$20,000 to \$29,999	124,427	15.06%	410	16.59%	110
Population with income \$30,000 to \$39,999	106,708	12.91%	399	16.13%	125
Population with income \$40,000 to \$49,999	86,769	10.50%	284	11.48%	109
Population with income \$50,000 to \$59,999	64,496	7.81%	182	7.35%	94
Population with income \$60,000 to \$69,999	47,545	5.75%	138	5.57%	97
Population with income \$70,000 to \$79,999	37,380	4.52%	111	4.49%	99
Population with income \$80,000 to \$89,999	29,618	3.58%	86	3.48%	97
Population with income \$90,000 to \$99,999	20,490	2.48%	49	1.99%	80
Population with income \$100,000 and over	46,832	5.67%	142	5.74%	101
Population with income \$100,000 to \$149,999	26,774	3.24%	79	3.21%	99
Population with income \$150,000 and over	20,058	2.43%	63	2.53%	104
PROJECTIONS					
Annual population growth in the period: Next 5 years		0.33%		-0.56%	-170
Annual household growth in the period: Next 5 years		0.87%		0.05%	6
Annual family growth in the period: Next 5 years		0.36%		-0.34%	-94
Annual population growth in the period: 5 to 10 years from current year		0.31%		-0.69%	-223
Annual household growth in the period: 5 to 10 years from current year		0.82%		-0.11%	-13
Annual family growth in the period: 5 to 10 years from current year		0.33%		-0.41%	-124
POPULATION GROWTH					
Current year total population	961,691		2,716		
5-Year Projections - Total population	977,494		2,640		
10-Year Projections - Total population	992,586		2,550		

Appendix B: Louisbourg Retail Inventory

(Source: FBM, February 2021)

NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE CATEGORY	RETAIL, VACANT or OTHER	TENANT NAME	SIZE (SF)	REGION	Branded Chain or Local Business	Branded Chain or Local Business Count
445310	Beer, wine and liquor stores	ALCOHOL & TOBACCO	RETAIL	NSLC	4,750	LOUISBOURG	BRANDED	1
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	OTHER	RBC	2,000	LOUISBOURG		
722511	Full-service restaurants	FULL SERVICE F&B	RETAIL	BEGGARS BANQUET	2,863	LOUISBOURG	LOCAL	1
722512	Limited service eating places	LIMITED SERVICE F&B	RETAIL	FOGGY HERMIT CAFÉ	2,800	LOUISBOURG	LOCAL	1
445120	Convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	RETAIL	LOUISBOURG GENERAL STORE	1,900	LOUISBOURG	LOCAL	1
722511	Full-service restaurants	FULL SERVICE F&B	RETAIL	LOBSTER KETTLE RESTAURANT	2,000	LOUISBOURG	LOCAL	1
452999	All other miscellaneous general merchandise stores	SPECIALTY RETAIL	RETAIL	FORTRESS INN GIFT SHOP	750	LOUISBOURG	LOCAL	1
722410	Drinking places (alcoholic beverages)	FULL SERVICE F&B	RETAIL	FORTRESS INN JAKES CLUB LOUNGE RESTAURANT	1,500	LOUISBOURG	LOCAL	1
812310	Coin-operated laundries and dry cleaners	PERSONAL SERVICE	RETAIL	LAUNDROMAT	750	LOUISBOURG	LOCAL	1
722512	Limited service eating places	LIMITED SERVICE F&B	RETAIL	PERMANENT FOOD TRUCK	500	LOUISBOURG	LOCAL	1
711311	Live theatres and other performing arts presenters with facilities	ARTS & ENTERTAINMENT	RETAIL	LOUISBOURG PLAYHOUSE	6,000	LOUISBOURG	LOCAL	1
452999	All other miscellaneous general merchandise stores	SPECIALTY RETAIL	RETAIL	DOLLHOUSE SOUVENIRS & GIFTS (FOR SALES)	1,000	LOUISBOURG	LOCAL	1
722511	Full-service restaurants	FULL SERVICE F&B	RETAIL	STARLIGHT CAFÉ / GRUBSTAKE RESTAURANT	3,450	LOUISBOURG	LOCAL	1
452999	All other miscellaneous general merchandise stores	SPECIALTY RETAIL	RETAIL	FORTRESS GIFTSHOP	1,330	LOUISBOURG	LOCAL	1
722511	Full-service restaurants	FULL SERVICE F&B	RETAIL	FORTRESS RESTAURANT	1,500	LOUISBOURG	LOCAL	1
722512	Limited service eating places	LIMITED SERVICE F&B	RETAIL	FORTRESS BAKERY	250	LOUISBOURG	LOCAL	1
722511	Full-service restaurants	FULL SERVICE F&B	RETAIL	HWY 22 RESTAURANT	2,500	LOUISBOURG	LOCAL	1
		VACANT	VACANT	VACANT (Chinese Restaurant)	4,000	LOUISBOURG		
		VACANT	VACANT	VACANT (Building Supply)	2,300	LOUISBOURG		
		VACANT	VACANT	VACANT (Coffee Shop)	750	LOUISBOURG		
		VACANT	VACANT	Vacant (Beside Post Office)	4,200	LOUISBOURG		
		VACANT	VACANT	VACANT (Beside Laundromat)	750	LOUISBOURG		
		VACANT	VACANT	VACANT (Beside Post Office on corner)	1,300	LOUISBOURG		
		VACANT	VACANT	VACANT (Pizza Shop)	710	LOUISBOURG		



people driven design.