



Retail Market Analysis

Cape Breton Regional Enterprise Network

For the communities of Port Hawkesbury, St. Peter's, Inverness, Baddeck, & Ingonish

April 2022



Land Acknowledgment

FBM would like to respectfully acknowledge that Nova Scotia is the ancestral and traditional territory of the Mi'kmaq People. We honour the Mi'kmaq as the traditional inhabitants and our community partners.



Preface

Fowler Bauld & Mitchell Ltd. (“FBM”) was commissioned by the Cape Breton Partnership to conduct a Retail Market Analysis for the communities of Port Hawkesbury, St. Peter’s, Inverness, Baddeck and Ingonish.

The study was carried out over the period of November 2021 through April 2022. On-the-ground fieldwork in the study communities was carried out in January 2022.

The objective of this study was to thoroughly document current retail inventories and define the realistic Retail Trade Areas for which they serve. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity, associated gaps in the market provision of shops and services, and to determine what type of retail could fill these gaps. The end result is to bolster the retail market in retail areas by retaining or attracting greater market share of resident, visitor and passing motorists’ spending in the community.

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.

Also, any tenant references made in the report are for illustrative purposes only and should not be taken as guarantees that they will locate in the study communities but rather that they could represent compatible “target” category types to pursue either for local businesses or external regional businesses over the next decade.

This analysis was conducted by FBM as an objective and independent party, and is not an agent of any municipality or Cape Breton REN or Cape Breton Partnership.

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FBM

2022

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1.0 Introduction

1.1 Scope of Study

Fowler Bauld & Mitchell Ltd. (“FBM”) was commissioned by the Cape Breton Partnership to conduct a Retail Market Analysis for the communities of Port Hawkesbury, St. Peter’s, Inverness, Baddeck and Ingonish.

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The objective of this study is to thoroughly document current retail inventories and define the realistic Retail Trade Areas for which they serve. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity, associated gaps in the market provision of shops and services, and to determine what type of retail could fill these gaps. The end result is to bolster the retail market in retail areas by retaining or attracting greater market share of resident, visitor and passing motorists’ spending in the community.

1.2 Report Structure

Section 1 – Introduction: Introduces the study process and structure.

Section 2 - Regional and Local Context: Lays out the important regional and local context of Port Hawkesbury, St. Peter’s, Inverness, Baddeck and Ingonish in terms of geographic location, regional access and traffic counts, including relevant plans, studies and initiatives.

Sections 3 to 7 - Community Retail Market Assessment for Port Hawkesbury, St. Peter’s, Inverness, Ingonish and Baddeck:

Identifies and defines each community’s respective Primary Retail Trade Area and demographics including retail spending, as well as the visitation volume and visitor spending. Each section also assesses the current retail inventory in the community and quantifies future retail demand over the next 10 years given changing resident population and visitor forecasts.

Section 8 - Key Findings Summary: Summarizes key retail market findings and opportunities for each community and presents an overall positioning strategy.

1.3 CanaCode Lifestyle Clusters Descriptions

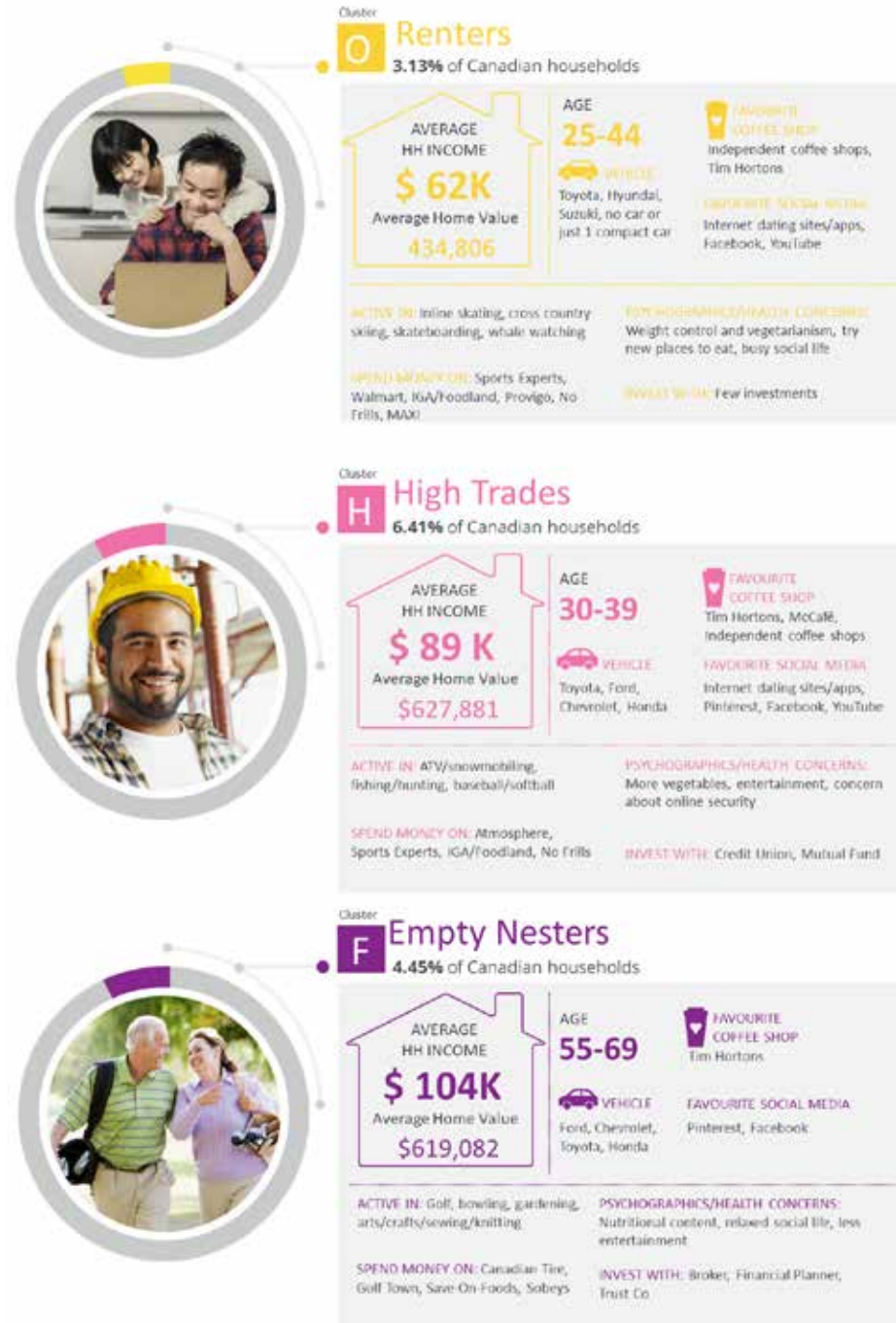
CanaCode Lifestyles is a customer segmentation that combines demographic, household spending, consumer lifestyle, attitude and behavioural databases, with a view of a target market’s choices, preferences and shopping patterns.

The two-tier lifestyle segmentation system works at the six-digit postal code level and classifies Canada’s consumer landscape into 18 distinct lifestyle segments.

The three lifestyles presented in **Figure 1-1** are the dominant CanaCode Lifestyle Clusters that prevail in the Cape Breton region and which are summarized in the respective demographic sections of this document.

A full listing of the CanaCode Lifestyle Clusters can be viewed at www.polarisintelligence.com/canacode/

Figure 1-1. Dominant CanaCode Lifestyles in Cape Breton



2.0 Location & Background Information

2.1 Introduction

Location factors are an essential foundation to retail success, and an understanding of these factors can help create the necessary conditions for attracting and retaining businesses in a community. This section identifies the regional and local characteristics of Port Hawkesbury, St. Peter's, Inverness, Baddeck and Ingonish as they relate to the attraction and retention of retail businesses and merchandise categories.

2.2 Local and Regional Context

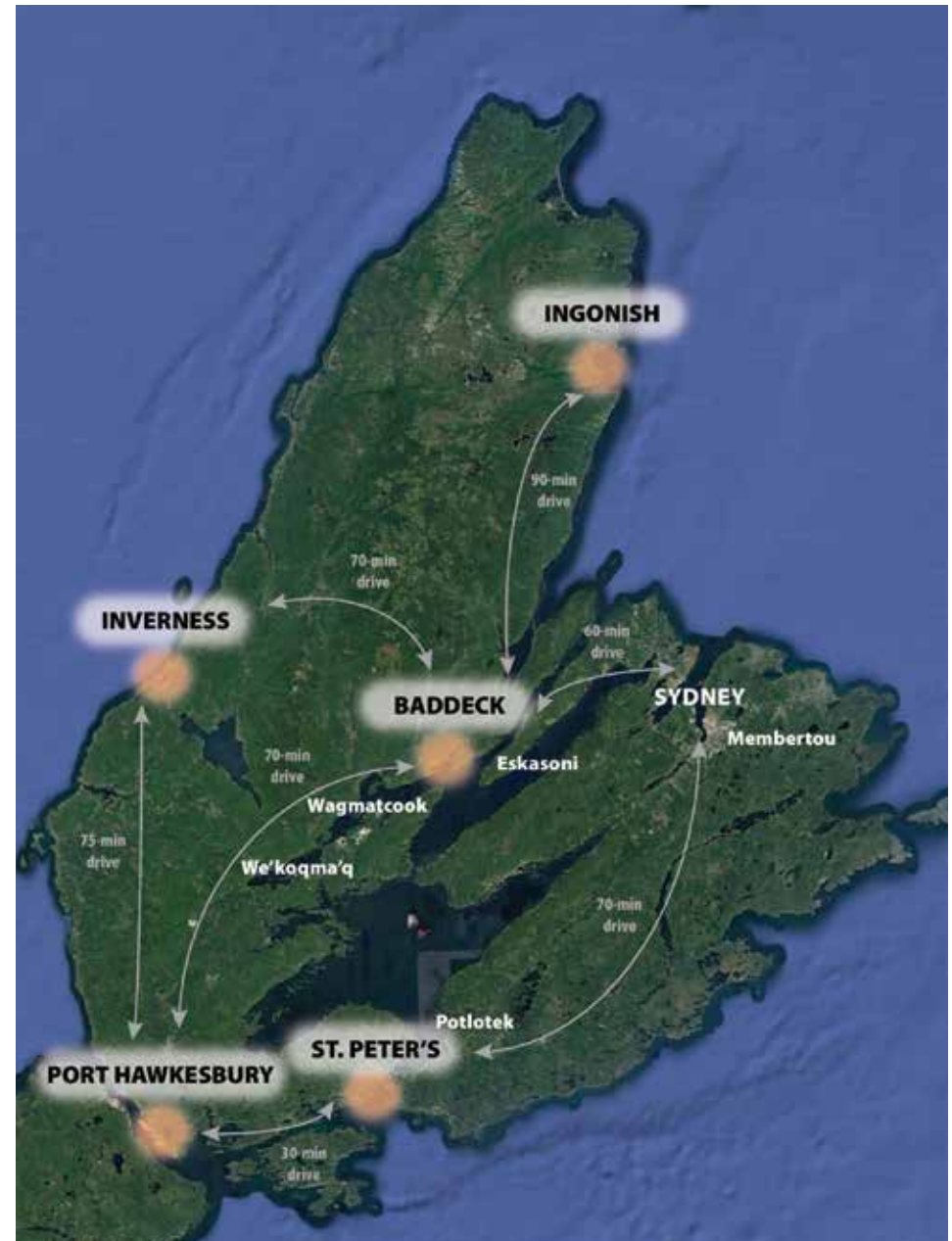
Cape Breton island is home to 131,476 people (year end 2021) with the Town of Port Hawkesbury being the second largest population centre outside of the City of Sydney. The majority of the island is made up of small communities under 3,000 people split between Inverness County (which includes Inverness), Richmond County (which includes St. Peter's), Victoria County (which includes Baddeck) and Cape Breton Regional Municipality.

The Canso Causeway is located 10 minutes north west of the Town of Port Hawkesbury and is the only land entrance to the island. Port Hawkesbury can be reached within 2 hour drive for the majority of islanders, however Sydney as a larger shopping centre is likely to be a stronger draw for residents to the northeast. **Figure 2-1** shows drive times of the communities examined in this study.

Nova Scotia Community College's (NSCC) Strait Area Campus is located just north of the Town of Port Hawkesbury, and specializes in providing marine training through the Nautical Institute. The Strait Area Campus also offers satellite programs at the Wagmatcook Learning Centre in Wagmatcook First Nation.

Signs of positive population growth due to affordable quality of life, and aggressive immigration and retention efforts by the province of Nova Scotia and Cape Breton Island are already being seen across Cape Breton Island. In the most recent census period (2016 to 2020), historic population declines in Baddeck, Inverness, Port Hawkesbury and St. Peter's have shown a rapid slowdown.

Figure 2-1. Drive Times Between Study Area Communities



First Nations

There are five organized indigenous settlements on Cape Breton: We'koqma'q, Wagmatcook, Potlotek, Eskasoni and Membertou. Each of these communities is a federal "Indian Reserve" and not part of the municipalities that surround them. However, reserves are able to make plans like other municipalities such as the Membertou Land Code which is similar to a land use Bylaw.

External organizations like the Indigenous Tourism Association of Canada, the Nova Scotia Indigenous Tourism Enterprise Network and Kwilmu'kw Maw-klusuaqn (KMK, or Mi'kmaq Rights Initiative) have highlighted the potential for inclusive, integrated growth for the cultural tourism sectors of both settler and indigenous communities.

Pre-pandemic Visitor Profile

Cape Breton tourism information is contained in the October 2019 Tourism Indicators from Tourism Nova Scotia (all figures are year to date to end of October 2019). 153,000 cruise ship passengers visited Cape Breton in that year, representing a 19% increase over the previous year.

Figure 2-2. Capture Rate - Top 7 Visited Communities on Cape Breton Island.

(Source: Tourism NS, 2019 Visitor Exit Survey Report)

Capture Rate		
	Pleasure Visitor	VFR* Visitor
Baddeck	48%	23%
Chéticamp	42%	10%
Sydney	30%	41%
Ingonish	35%	7%
Cape Breton Highlands National Park	27%	9%
Louisbourg	21%	10%
Inverness	19%	7%

Those entering the province via ferries from Newfoundland totaled 46,000, representing a 3% decrease from 2018 figures, from the same period. Hotel occupancy rate was 53%, which is slightly lower than for the province overall, at 56%. Occupancy particularly spikes in the summer months in Cape Breton, with occupancy of 68% and 78% in July and August respectively. Across the province, there was a 35% increase in room night bookings through sharing websites, such as Airbnb, compared to 2018. For information on each study area community, see **Sections 3-7**, respectively.

The Tourism Nova Scotia 2019 Visitor Exit Survey Report notes that 28% of Pleasure Visitors to the province spend at least one night in Cape Breton. Locations outside of CBRM that most often capture Island visitors include Baddeck, Chéticamp and Ingonish (see **Figure 2-2**). The average stay for a Cape Breton visitor is 4.4 nights.

The average spending is \$140/day for "pleasure" visitors and \$90/day for "Visiting Friends and Relatives (VFR)" visitors. These spending figures include travel and accommodations costs as well as traditional retail expenditures.

Specifically, and since tourism is a major economic driver for Cape Breton communities, the retail spending generated by visitors across the region plays an important role in quantifying demand. Accordingly, and based on the most recent visitor data, the following total visitor trip spending allocation is observed and used in this study, as appropriate:

Accommodation	\$2,914	29.3%
Campgrounds	\$224	2.3%
Meals in restaurants & bars	\$2,935	29.5%
Groceries & liquor	\$507	5.1%
Gas, oil, auto repair	\$1,369	13.8%
Car rental fees	\$125	1.3%
Local transportation	\$19	0.2%
Tolls	\$19	0.2%
NS cultural products	\$337	3.4%
Clothing	\$399	4.0%
Other shopping	\$431	4.3%
Culture & entertainment	\$565	5.7%
Sport & recreation	\$93	0.9%

Tourism Nova Scotia's "Strategic Game Changers" to increase tourism spending in the province include the following (Source: Tourism NS):

- » Increasing quantity, variety and quality of accommodations;
- » Increasing offerings and visitation during the off season;
- » Improving skills training for workers in the tourism industry;
- » Increasing air travel to the province and attracting visitation from markets including China; and
- » Improved marketing.

Post-pandemic Visitor Profile

Cape Breton's tourism sector was hit particularly hard by the COVID-19 pandemic, but is showing signs of rebound with an expected recovery in the coming years (Destination Cape Breton Rise Again 2030). Recent information for the island is contained in November 2021 Tourism Indicators from Tourism Nova Scotia (all figures are year to date to end of November 2021). Cape Breton's hotel occupancy rate in 2021 was 41% which is 12% higher than 2020, and 12% lower than 2019. This is on-par with the provincial occupancy rate of 41%. Website activity on novascotia.com grew 72% from 2020 as visitors look to explore the province.

Emerging tourism trends include adventure tourism and increased virtual meetings over in-person meetings, greater interest in responsible and technologically innovative 'smart' tourism, growth of wellness travel, and increased professionalism of short-term rentals.

Insights from prominent visitor locations like Cabot Cliffs golf course provide cues for the resurgent demand for visitation. According to Cabot Cliff's EVP Global Real Estate Sales, Andrew Alkenbrack, *"As for 2022, it is busy to say the least. We have already booked over 45,000 rounds and our occupancy is at 97% for the entirety of the season, with 53% for 2023 already."*

Recreational Property Profile

The recreational property sector in Cape Breton has long been a consideration for provincial residents who have seasonal cottages. However, the nature of investment and ownership of recreational property is changing and is likely to continue to have a positive impact on growth in many Cape Breton communities, namely Inverness, Ingonish and Baddeck.

According to a 2021 study by Royal LePage titled "Recreational Property Prices", Atlantic Canada saw a forecasted increase from an average prices of \$193,984 to \$226,961 from 2020 to 2021, representing a growth of 17%, which is the highest of all regions and 2% higher than the national average.

Specifically, and within Atlantic Canada, Cape Breton's Recreational Property prices changed noticeably as follows:

Single Family House: 2019 - \$148,179 / 2020 - \$165,052 / 11.4% change

Waterfront Home: 2019 - \$210,656 / 2020 - \$266,400 / 26.5% change

There is a high likelihood that prices will continue to grow and along with this growth the target audience will become more national and international, commensurate with higher affluence and corresponding spending patterns.

2.3 Relevant Plans & Studies

Internet for Nova Scotia Initiative (Develop NS)

Develop Nova Scotia is the Crown Corporation responsible for developing and implementing a strategy to provide high-speed Internet access across Nova Scotia. The Internet for Nova Scotia Initiative will make access to high-speed Internet available to more than 95% of Nova Scotian homes and businesses—and as close to 100% as possible.

The need for better, reliable high-speed Internet service across Nova Scotia is essential. In many ways it will have a similar impact to bringing electricity to every corner of the province so many decades ago. We understand the urgency to move as quickly as possible to address the challenge and we are getting there—faster. We are making progress. To date 90,000 homes and businesses are included as part of the project.

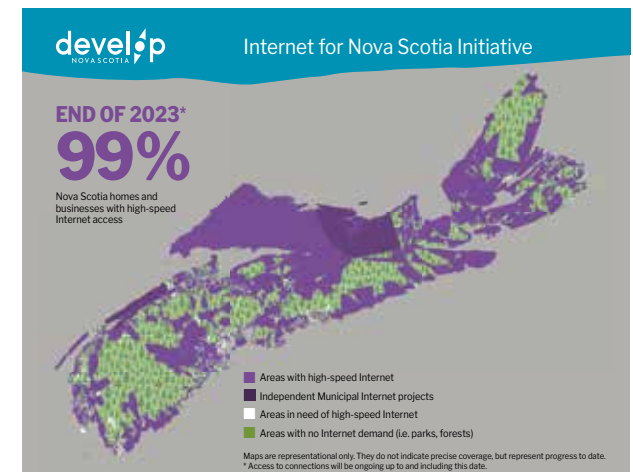
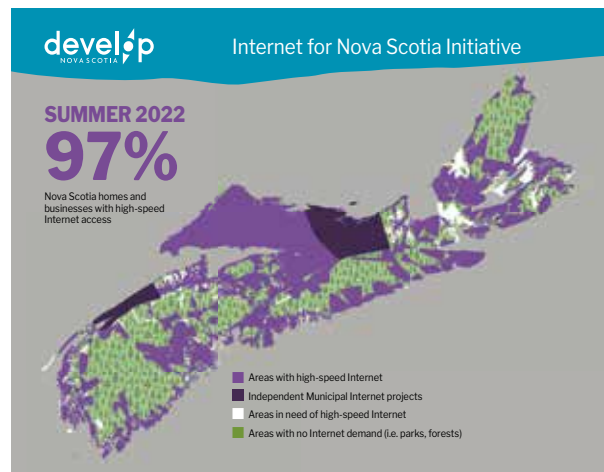
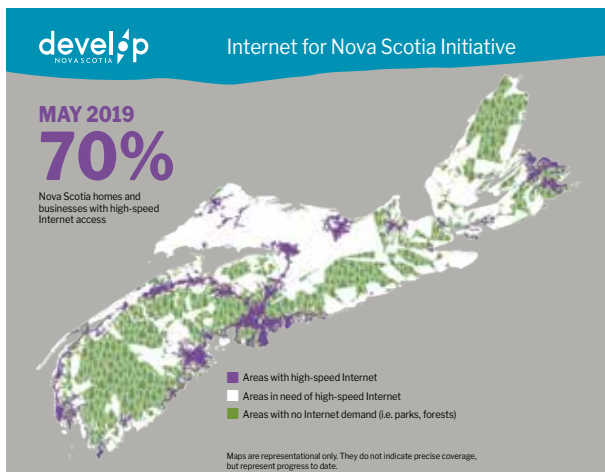
Through this work Develop NS identified additional underserved and captured where possible. There are approximately 4,300 remaining homes and businesses with whom Develop NS is working with qualified providers on potential solutions.

Since the first projects were announced in February 2020, approximately 52,000 (as of January 2022) of the total 90,000 homes and businesses that are part of our agreements with providers now have the network in place to provide new or improved high-speed Internet (**Figure 2-3**).

Destination Reeves Street (Ekistics Planning & Design, and Form: Media, 2015)

This plan presented a Complete Streets vision for Reeves Street - Port Hawkesbury's commercial main street. It aimed to grow the number of businesses, encourage mixed use developments, improve the quality of future developments, encourage façade improvements, and increase the tourism potential of Reeves Street, in addition to improving safety for cyclists, pedestrians, and cars.

Figure 2-3. Internet for Nova Scotia Initiative 2019, with targets for Summer 2022 and End of 2023



Eight big moves were recommended by the plan:

1. Connect Reeves Street with NSCC Greenway;
2. Use signage and landscaping to improve Reeve Street's gateways;
3. Utilize connections between Reeves Street and other destinations;
4. Improve existing active transportation connections along Reeves Street using Complete Street principles and a road diet;
5. Utilize empty lots through infill development and site design standards;
6. Establish lot development standards to improve landscaping and reduce asphalt surfaces;
7. Introduce a façade improvement program for existing buildings;
8. Improve civic branding through wayfinding and signage.

The plan also presented a vision of what Reeves Street could become if the eight big moves were implemented (**Figure 2-4**).

As with any public space improvements including signage and placemaking, the objective is to create an environment to which visitors and residents are drawn, and as a result of which, they are made to feel more relaxed to spend more time and as a result have a much higher propensity to spend money in the respective community.

Inverness Central Avenue Detailed Design (UPLAND Planning and Design)

The redesign of Central Avenue in Inverness is premised on placemaking, active transportation and overall streetscaping enhancements for two kilometres of the community of Inverness's main street. This main street design project builds on the desire of the community to strengthen the identity of the central business district as a tourist destination and to make it a more pleasant place to navigate, both for locals and visitors. The project has developed the following core elements and is slated for construction to commence in 2022:

- » Gateway treatments;
- » Reconfiguring curb lines at intersections to encourage speed reduction;
- » Installation of crosswalk/decorative medians;
- » Sidewalk improvements;
- » The addition of bike lanes; and
- » Landscaping, street furniture design and placemaking.

Figure 2-4. Destination Reeves Street (2015) Design Concept.



Nova Scotia Main Streets Initiative Community Workbook (NS Federation of Municipalities & FBM, 2020)

The Village of St. Peter's was one of three communities involved in the creation of the Main Street Workbook in 2019/2020. The purpose of the Workbook was to explore possibilities for community-based action on Main Streets in Nova Scotia, while providing considerations for government strategies, programs or policies. The seven Principles for Community Main Streets and Policy Considerations that came out of this work were a direct result of community feedback and research.

For the Village of St. Peter's in particular, there was a strong interest coming into the Main Streets session on facade improvement, murals, gateway signage, resolving parking, traffic lights, pedestrian crossings, events, water access, volunteerism, and business organizing. Additional themes expressed in the engagement session included recognition of the strong business community, and the opportunity for the old NSLC building and Irving site at Grenville and Pepperell Streets to become community hubs with centralized parking (**Figure 2-5**).

Figure 2-5. Nova Scotia Main Streets Initiative Community Workbook (2020)



Inverness County Marketing Strategy (2016)

Written in 2016, the Municipality of Inverness Marketing Strategy was intended to guide the research, product development, branding, and marketing direction of 'Canada's Musical Coast'. This strategy aligned with Destination Cape Breton and Tourism Nova Scotia's respective tourism strategies, was based on research evidence, and sought to build on established core experiences, namely:

- » Coastal/Seacoast Experiences
- » Sightseeing and Touring
- » Culture, Entertainment and Heritage
- » Outdoor Activities
- » Major and International Events
- » Experiential Accommodations

Within the strategy, actions involving commercial operators included: piloting new experiences (particularly those related to coastal adventures, music and culture, and culinary experiences), building packages and experiences that support the brand, working with operators to extend the season and creating authentic Cape Breton experiences.

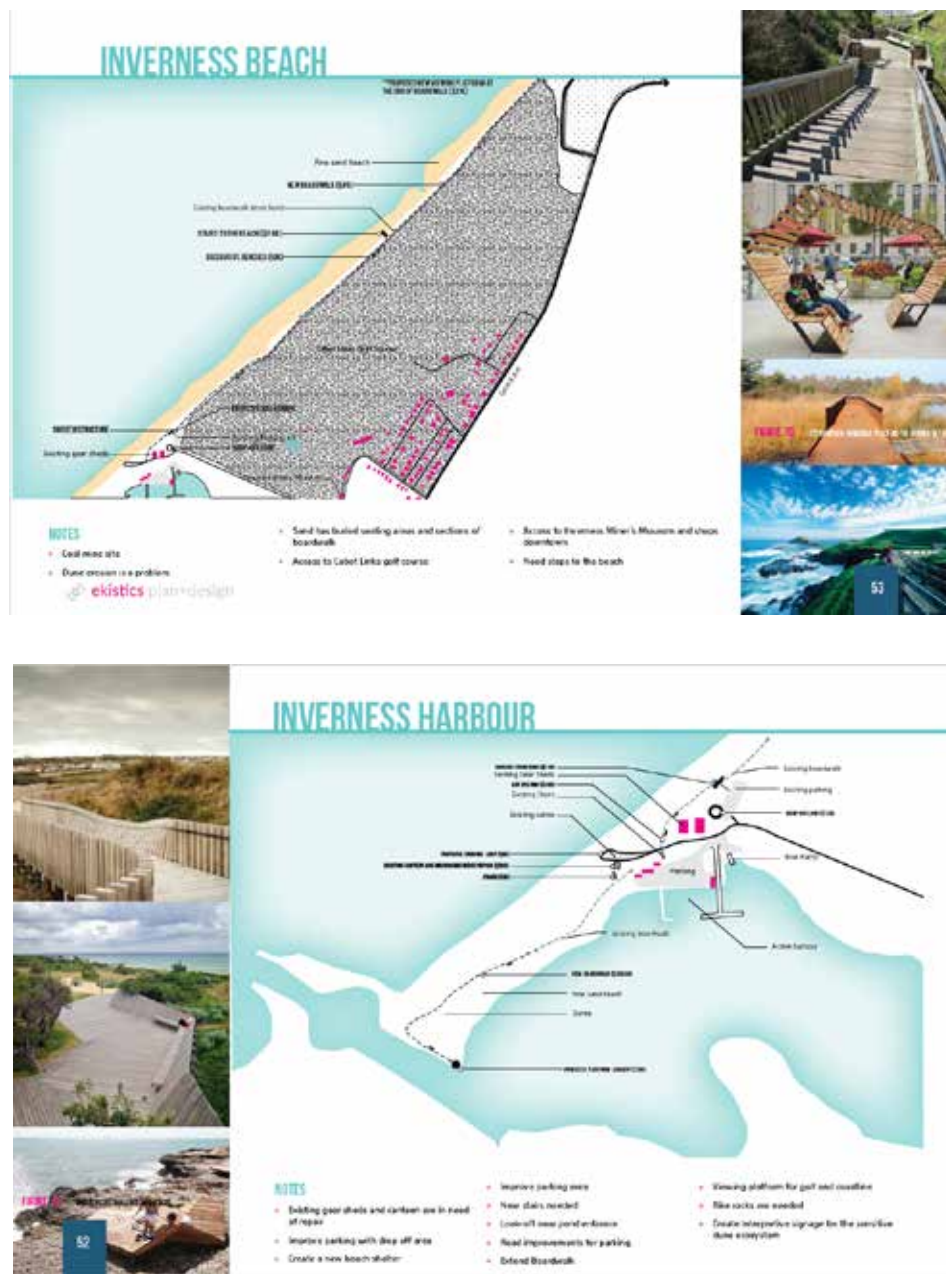
Inverness County Signature Spaces & Signage Strategy (2017)

Signature Spaces and Signage is a place-based strategy which catalogs a network of special places in the County that could be enhanced with specially made signage or other placemaking interventions. The purpose of the strategy is to connect visitors and locals alike to the 33 signature sites unique to the County, and to encourage them to stay longer.

Top destinations in Inverness County included the Inverness Art Centre, Inverness Beach, Cabot Links, and the Cape Breton Highlands National Park.

Inverness Harbour/Beach (**Figure 2-6**) in particular is considered a signature site for the community of Inverness, and it is located on a primary travel route which connects to the iconic Cabot Trail. As a site with strong destination appeal, existing facilities and amenities, and high visitation, the Inverness Harbour/Beach was selected as one of six sites for development in phase 1 (originally proposed for 2017-2020).

Figure 2-6. Inverness County Signature Spaces & Signage Strategy (2017)



Cultural Tourism Strategy for the Nova Scotia Mi'kmaq (2019)

There is growing tourist demand for indigenous culture and cultural experiences. The Cultural Tourism Strategy for the Nova Scotia Mi'kmaq was endorsed in 2019 by the Assembly of Nova Scotia Mi'kmaq Chiefs. The strategy prioritizes proper engagement with Mi'kmaq government leadership (chiefs and councils) and stimulating Mi'kmaq-led initiatives to promote authentic Mi'kmaq experiences. The priority focus areas of the Strategy are:

- » Mi'kmaq Leadership and Governance
- » Authenticity
- » Mi'kmaq Led Development
- » Marketing

The Strategy recognized tourism as an important economic generator which can support local economic development and increase self-reliance. Some of the key activities intended to support Mi'kmaq led development include:

- » Work collaboratively on destination development
- » Provide training, education and development opportunities for Mi'kmaq community members
- » Meet consumer demand by developing and/or adapting authentic, unique and engaging tourism experiences building on the Mi'kmaq Cultural Tourism brand attributes to ensure product and market readiness
- » Support the growth and expansion of emerging and established Indigenous tourism experiences
- » Explore other emerging partnership opportunities with federal and provincial agencies, as well as industry groups and private sector operators

Cape Breton Regulatory Modernization Pilot (2020)

Cape Breton municipalities reviewed the online availability of their bylaws following feedback from businesses. Businesses were also consulted to confirm what information they had identified as difficult to find or was outdated/obsolete.

Key findings:

- » Simple access to the Bylaws is lacking. This includes user confusion when faced with different organizational structures at different municipalities.
- » Lack of similarity. Legal consultants recommended a standard format/language for Bylaws on Cape Breton municipalities.
- » Updated organization and language. Grammar, formatting and language is broadly recommended to be updated.

The following Cape Breton municipalities conducted Bylaw modernization reviews:

- » **Town of Port Hawkesbury:** Ten Bylaws were identified as urgently requiring attention. Many of these Bylaws lacked clear legislative authority. Several Bylaws were tagged for requiring an update/inclusion to grammar, format, typography, clarity or definition of terms. Some Bylaws were not clearly relevant in a modern context.
- » **Inverness County:** Five Bylaws were identified as urgently requiring attention. Some Bylaws conflicted with other active Bylaws covering the same topic/field. Some Bylaws were too geographically restrictive to be useful in a modern context and they also cause potential legal confusion.
- » **Richmond County:** Six Bylaws were identified as urgently requiring attention. Poor formatting made several of the Bylaws unclear. Several Bylaws referenced superseded or repealed legislation.
- » **Victoria County:** Five Bylaws were identified as urgently requiring attention. Formatting and grammar issues created confusion around some Bylaws and their appropriate scope. Obsolete Bylaws were identified to be removed or made consistent with current municipal practice.

Rise Again 2030: Cape Breton Island Destination Development Strategy

With the goal of creating an all-season world class tourism destination, the #RiseAgain2030 strategy by Destination Cape Breton is meant to guide long-term, stable growth of tourism on Cape Breton. Investment in destination advertising from federal government funding and a Cape Breton Island Marketing Levy has been effective at promoting tourism to the island. Growth in tourism has created the need to respond with planning tools to new problems for Cape Breton communities like strong demand for short term rental housing.

The #RiseAgain2030 integrated strategy prioritizes empowering tourism stakeholders identified in regional “clusters” across Cape Breton Island. Stakeholders will be targeted for their collaborative business network capacity to achieve success within their region. Clusters may be differentiated based on the natural and commercial environments they are located within. For example, an adventure tourism cluster was proposed near Ingonish to leverage the potential of the Cape Breton Highlands. Specific tourism “game-changers” identified as early goals for the strategy include stimulating indigenous, cultural, adventure, culinary, and all-season tourism.

Plans and Policies Under Development

Once finalized, the following plans and policies have the potential to shape the future of retail and tourism in Cape Breton:

- » Victoria County Tourism Strategy
- » County of Inverness Growth Management Strategy Study
- » Authentic Mi’kmaw Cultural Tourism Guidelines
- » Richmond County Strategic Plan Refresh
- » Town of Port Hawkesbury Waterfront Development Plan
- » Strait of Canso Gateway Project

2.3 Transportation Context

One of the most significant aspects to successful commercial development relates to patterns of transportation. **Table 2-1** provides data from 2017 and 2020 provincial traffic counts, respectively, documented in the form of Average Annual Daily Traffic (AADT) for main roads in each study area community. Pre-pandemic AADT was between 2,000 to 5,000 vehicles per day in each direction for the communities of St. Peter’s, Inverness, Ingonish and Baddeck, while Port Hawkesbury saw approximately 6,000 AADT in each direction. In the first year of the COVID-19 pandemic, AADT numbers were predictably and noticeably lower. These changes can be attributed to travel restrictions for visitors outside of the Atlantic Bubble and general pandemic uncertainty. Percentage change between 2017 and 2020 ranged from -17% to -34%.

In general, major highway twinning improvements such as those underway between Antigonish and Port Hawkesbury and leading to Cape Breton Island will reduce drive times from the more populous parts of Nova Scotia, which will benefit locations like Port Hawkesbury and St. Peter’s, and others, where these communities may now become more focal stop-and-dine or stop-and-rest locations.

Table 2-1. AADT Vehicle Counts

<i>Direction</i>	2017 (June-Sept)		2020 (June/July)		% Change	
	<i>West</i>	<i>East</i>	<i>West</i>	<i>East</i>	<i>West</i>	<i>East</i>
Port Hawkesbury	6,260	5,940	4,140	4,170	-33.9	-29.8
St. Peter’s	4,360*		1,840	1,870	NA	
Inverness	3,090*		2,540*		-17.8	
Ingonish	2,140*		1,460*		-31.8	
Baddeck	4,760*		3,500*		-26.5	

*Total traffic count (both directions)

While no public transit system exists for the island outside of Sydney, Strait Area Transit provides service between Port Hawkesbury and Inverness. Maritime Bus and Island Shuttle also provide service between Halifax and Sydney. Notable stops include Baddeck, Whycocomagh, Port Hastings, Port Hawkesbury, Antigonish, and Truro.

For those traveling by air, J.A. Douglas McCurdy Sydney Airport is the main regional airport in Cape Breton, and as of February 2022, flights between Halifax, Montreal and Toronto have resumed. Allan J. MacEachen Regional Airport in Port Hastings also services commercial operated and privately owned aircrafts, and is the closest airport to Cabot Links making it popular amongst golfers for private jets.

Port Hastings Rotary

The NS Department of Public Works is in the final stages of preparing to replace the existing Port Hastings rotary with a new roundabout, originally scheduled for 2021/2022 (**Figure 2-7**).

Those traveling over the Canso Causeway toward Port Hawkesbury can expect fewer delays, while those traveling back to the mainland will benefit from storage lanes allowing vehicles to queue while waiting for the swing bridge to close.

Figure 2-7. Port Hastings Proposed Roundabout (NS Department of Public Works, 2021)

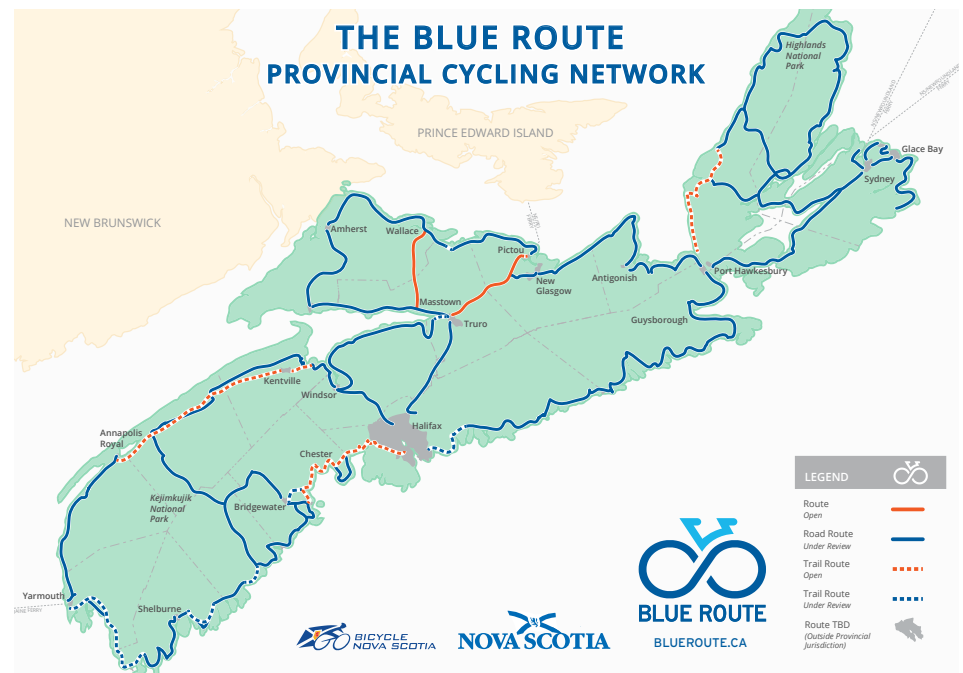


Blue Route

The Blue Route is a province wide network of bicycling infrastructure which, when complete, will enable residents and visitors to travel across Nova Scotia safely by bike (**Figure 2-8**). St.Peter's, Ingonish and Baddeck are located on road portions of the Blue Route, with Inverness being the only community connected by a trail route with Port Hastings (northeast of Port Hawkesbury). This portion of the Blue Route is known as the Celtic Shore Coastal Trail which features 92km of fairly flat and hard-packed trail way.

In June 2021, the Town of Port Hawkesbury with support from the provincial and federal government, announced 7km of new active transportation connections including the Tamarac Off-road Blue Route Connection (0.5km) and Destination Reeves Street (0.7km). This new infrastructure will expand the Blue Route into Port Hawkesbury while also supporting active transportation and the objectives of the Destination Reeves Street (2015) plan.

Figure 2-8. Nova Scotia Blue Route Network (2017)



3.0 Port Hawkesbury Retail Market Assessment

3.1 Introduction

The Town of Port Hawkesbury lies approximately 5km southeast of the Canso Causeway, and is the first major urban center for those arriving to Cape Breton Island by land. Well known for its deep ice free port and strong industrial sectors, the Town also has a concentration of large to medium size retail users along Reeves Street.

In 2019, 10% of visitors to Port Hawkesbury stopped for at least 30 minutes or stayed overnight. The Port Hawkesbury Civic Centre is a major focal point for the community with a 500-seat theater, flexible meeting and conference facilities, 1,000 fixed seat arena, and the J. Franklin Wright Gallery. During the summer months, the Centre also hosts weekly ceilidh's which are staggered with weekly outdoor concerts on the Granville Green. Additional local attractions include Customs House artisan incubator, Port Hawkesbury Community Park, and Strait Area Trails. The Town is also preparing a Waterfront Development Plan and a Marine Innovation Centre along the waterfront with the support of Destination Cape Breton, Develop Nova Scotia, Atlantic Opportunities Agency, and NSCC.

3.2 Trade Area

Port Hawkesbury is the primary service area for the southern communities of Cape Breton Island. In order to create a framework for evaluating retail demand and subsequent gaps in the provision of shops and services, it is necessary to define and identify the Trade Areas from which Port Hawkesbury's retail sales are most frequently and likely to be sourced. The delineated Trade Area recognize drive times, demographics, spending attributes and competition, which collectively portray the market to prospective tenants, developers and investors.

Identifying the Trade Area is important for understanding the total market potential available to current and future retailers. The local and regional residential base has particular demographic and spending habits that provide insight as to the type of compatible retail tenants, the amount of retail floorspace supportable in the market, and the current inflow or outflow of retail sales, and for which categories such inflow or outflow exists.

Major considerations in defining the Retail Trade Area also help sensitize potential market share inputs of corresponding Trade Area retail spending.

Retail Trade Area determinants include:

1. Transportation networks, including streets and highways, which affect access, drive times, commuting and employment distribution patterns;
2. Major infrastructure projects both planned or under development which could affect future travel patterns;
3. Overall community development vision, including an understanding of key nodes' characteristics;
4. Local and regional competitive environment, present and future;
5. Proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;
6. Significant natural and man-made barriers (e.g. water features, highways, industrial areas);
7. De facto barriers resulting from notable socioeconomic differentiation; and
8. Patterns of existing and future residential and commercial development.

For this particular study, the Retail Trade Area is delineated utilizing a combination of drive times and competitive forces including the Town of Antigonish, and the outlying communities of St. Peter's, Inverness, Baddeck and Ingonish. The Trade Area extends southwest within a ~40 minute drive time to encompass smaller communities on the mainland of Nova Scotia who are more likely to visit Port Hawkesbury than Antigonish. Similarly, this Trade Area also includes communities within a ~60 minute drive time north and east of Port Hawkesbury.

The Trade Area for Port Hawkesbury is detailed in **Appendix A** and illustrated in **Figure 3-1**. Estimated for the end of year 2021, Port Hawkesbury's Trade Area population is 24,150 with 58% considered as a Rural Handyman lifestyle cluster (**Figure 3-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be older with a lower household income.

Figure 3-1. Port Hawkesbury Trade Area



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, nor does it reflect the most recent Statistics Canada Federal Census release which has begun to show a much slower rate of decline and in fact is heading towards positive population growth over the next decade. Forecast estimates for the Trade Area suggest that the population could grow from 24,150 to 25,400 at conservative estimates, which bucks the trend of the past 20 years and is indicative of a new future for Cape Breton Island.

3.3 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 2021 year end data.

Trade Area Resident Household Spending

Each of the major five categories of spending (Convenience, Comparison, Leisure, Auto and Online Sales) was assessed at a detailed category-by-category level then aggregated into major categories as shown in **Figure 3-3** for the Port Hawkesbury Trade Area.

The Port Hawkesbury Trade Area spending, as illustrated in **Table 3-1** is estimated at \$289 million in 2021 and is forecast to grow to \$315 million by 2026 and \$342 million by 2031. This demand is premised on Port Hawkesbury growing from its current Trade Area population base of 24,150 to approximately 25,400 by 2031.

Visitor Spending

Because Port Hawkesbury is a service centre for a wider ranging number of communities, it is less driven by Tourism as its Cape Breton Island counterpart communities.

It is however, a primary point of divergence or pit-stop for the “rubber-tire” trade area or passing motorists whose destinations may be the Cabot Trail or Sydney. As noted previously, only 10% of visitors to or through Port Hawkesbury stay for 30 minutes or less.

Figure 3-2. Dominant Lifestyle Cluster in Port Hawkesbury Trade Area



Regardless, of this duration, there is an opportunity for Port Hawkesbury to capture more visitors than they currently do, whether this is through enhanced marketing, streetscape improvements to Reeves St or simply as a benefactor of regional transportation improvements to the highway network leading to Port Hawkesbury.

Estimates of visitor spending in Port Hawkesbury assume that approximately 50,000 annual visitors stop in Port Hawkesbury generating approximately \$1 million dollars annually, wherein the largest spending categories are likely to be food & beverage and auto fuel purchases, as summarized in **Table 2**.

Figure 3-3. Port Hawkesbury Trade Area Resident ONLY Retail Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

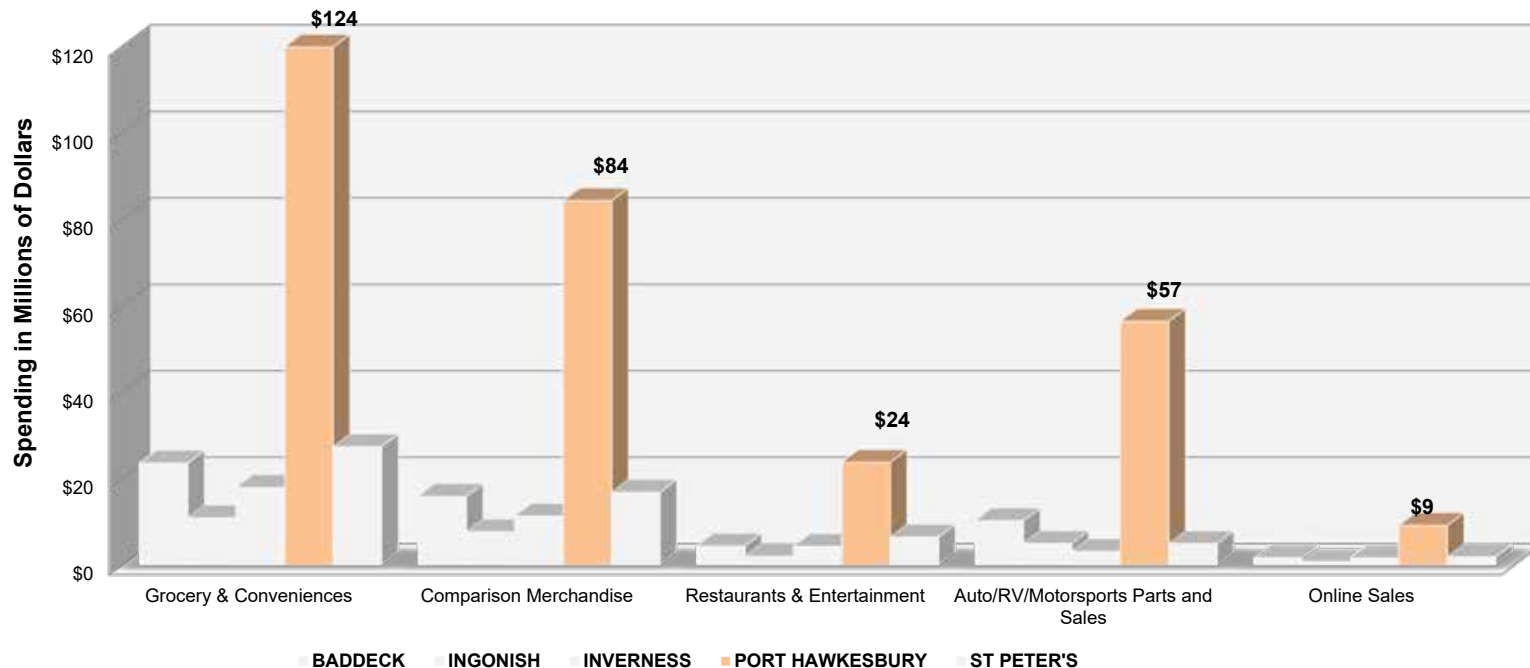


Table 3-1. Port Hawkesbury Trade Area Resident AND Visitor Retail Spending Summary 2021 Y/E estimate

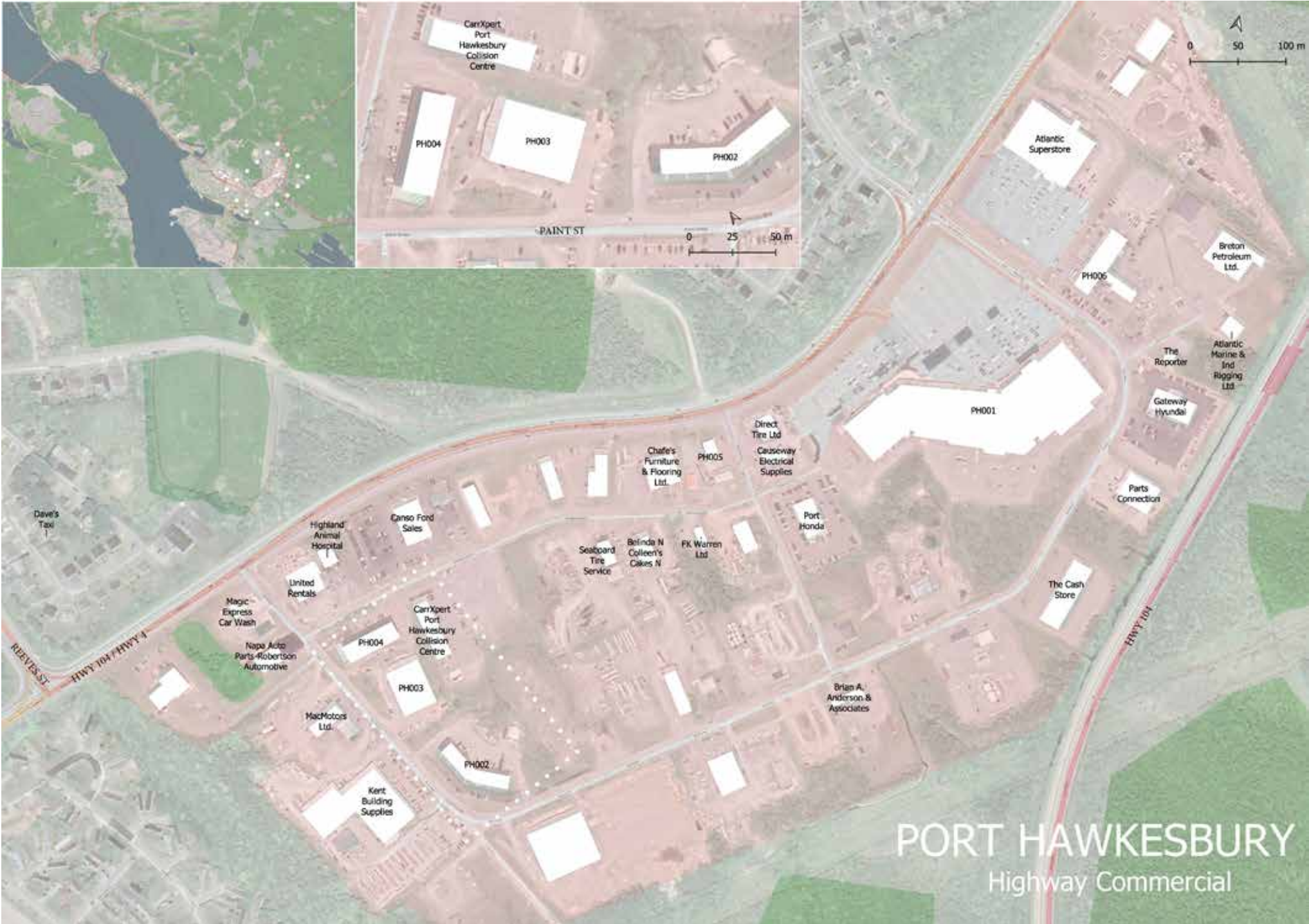
(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category		PORT HAWKESBURY PRIMARY TRADE AREA + VISITOR SPENDING									% Change 2021 to 2031
		2021			2026			2031			
		PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	PORT HAWKESBURY	
		Y VISITOR	Y TRADE AREA	Y TOTAL	Y VISITOR	Y TRADE AREA	Y TOTAL	Y VISITOR	Y TRADE AREA	Y TOTAL	
Aggregate Retail Spending	Aggregate Retail Spending	Visitor + Resident Spending	Aggregate Retail Spending	Aggregate Retail Spending	Visitor + Resident Spending	Aggregate Retail Spending	Aggregate Retail Spending	Visitor + Resident Spending			
Conveniences	Grocery & Convenience	\$50,000	\$79,169,528	\$79,219,528	\$60,095	\$86,274,352	\$86,334,447	\$68,041	\$93,955,707	\$94,023,748	18.7%
	Pharmacy	\$10,000	\$9,076,591	\$9,086,591	\$12,019	\$9,891,141	\$9,903,160	\$13,608	\$10,771,790	\$10,785,398	18.7%
	Alcohol & Tobacco (Incl Cannabis)	\$30,000	\$14,410,428	\$14,440,428	\$36,057	\$15,703,647	\$15,739,704	\$40,825	\$17,101,806	\$17,142,631	18.7%
	Personal Services	\$0	\$20,950,756	\$20,950,756	\$0	\$22,830,917	\$22,830,917	\$0	\$24,863,646	\$24,863,646	18.7%
	Fashion & Accessories	\$60,000	\$14,559,344	\$14,619,344	\$72,113	\$15,865,927	\$15,938,041	\$81,650	\$17,278,535	\$17,360,185	18.7%
	Jewelry	\$10,000	\$1,031,256	\$1,041,256	\$12,019	\$1,123,803	\$1,135,822	\$13,608	\$1,223,860	\$1,237,468	18.8%
Comparison	Health & Beauty	\$0	\$5,408,745	\$5,408,745	\$0	\$5,894,136	\$5,894,136	\$0	\$6,418,914	\$6,418,914	18.7%
	Home Furniture & Décor	\$10,000	\$6,992,769	\$7,002,769	\$12,019	\$7,620,313	\$7,632,332	\$13,608	\$8,298,781	\$8,312,389	18.7%
	Appliances & Electronics	\$0	\$11,679,681	\$11,679,681	\$0	\$12,727,838	\$12,727,838	\$0	\$13,861,049	\$13,861,049	18.7%
	Home Improvement & Gardening	\$0	\$27,150,837	\$27,150,837	\$0	\$29,587,405	\$29,587,405	\$0	\$32,221,691	\$32,221,691	18.7%
	Books & Media	\$10,000	\$3,535,067	\$3,545,067	\$12,019	\$3,852,310	\$3,864,329	\$13,608	\$4,195,297	\$4,208,905	18.7%
	Sporting Goods	\$0	\$2,010,268	\$2,010,268	\$0	\$2,190,674	\$2,190,674	\$0	\$2,385,718	\$2,385,718	18.7%
	Toys & Hobbies	\$20,000	\$2,587,031	\$2,607,031	\$24,038	\$2,819,196	\$2,843,234	\$27,217	\$3,070,201	\$3,097,417	18.8%
	Specialty Retail	\$50,000	\$9,465,987	\$9,515,987	\$60,095	\$10,315,483	\$10,375,578	\$68,041	\$11,233,912	\$11,301,954	18.8%
	Quick Service F&B	\$140,000	\$6,658,072	\$6,798,072	\$168,265	\$7,255,580	\$7,423,845	\$190,516	\$7,901,574	\$8,092,089	19.0%
	Restaurants & Pubs	\$300,000	\$13,824,395	\$14,124,395	\$360,567	\$15,065,022	\$15,425,590	\$408,248	\$16,406,322	\$16,814,570	19.0%
Leisure	Arts & Entertainment	\$90,000	\$796,721	\$886,721	\$108,170	\$868,220	\$976,390	\$122,474	\$945,521	\$1,067,995	20.4%
	Fitness & Leisure	\$10,000	\$2,574,453	\$2,584,453	\$12,019	\$2,805,489	\$2,817,508	\$13,608	\$3,055,273	\$3,068,881	18.7%
	Auto Parts & Accessories and Fuel	\$210,000	\$20,641,958	\$20,851,958	\$252,397	\$22,494,406	\$22,746,803	\$285,773	\$24,497,174	\$24,782,948	18.9%
Auto	Auto/RV/Motorsports Dealership	\$0	\$35,877,991	\$35,877,991	\$0	\$39,097,750	\$39,097,750	\$0	\$42,578,781	\$42,578,781	18.7%
	TOTAL CATEGORIES	\$1,000,000.0	\$288,401,878	\$289,401,878	\$1,201,891.7	\$314,283,610	\$315,485,502	\$1,360,825.4	\$342,265,553	\$343,626,378	18.7%
	TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$790,000.0	\$231,881,929	\$232,671,929	\$949,494.4	\$252,691,454	\$253,640,949	\$1,075,052.1	\$275,189,597	\$276,264,649	18.7%
	TOTAL Online Sales		\$9,272,970								

Figure 3-4. Port Hawkesbury Business Inventory Map for Reeves Street and Neighbourhood Areas (February 2022)



Figure 3-5. Port Hawkesbury Business Inventory Map for Highway Commercial Area (February 2022)



3.4 Retail Inventory

Retail in Port Hawkesbury is primarily located along Reeves Street with anchor tenants like Canadian Tire, Sobeys, Shoppers Drug Mart and TD Bank, as well as major recreation facilities namely the Port Hawkesbury Civic Centre. Similarly, along Trunk Route 4, the Port Hawkesbury Shopping Centre is home to Walmart, Giant Tiger and Pet Value, while the immediate adjacencies include Atlantic Superstore, Toyota and Hyundai dealerships. In the light industrial park surrounding the latter there are other ancillary automotive and construction oriented business, and as well as miscellaneous commercial businesses interspersed therein. A complete business inventory of Reeves Street and the Highway 4 Commercial area are provided in **Figure 3-4** & **Figure 3-5** respectively. **Figure 3-4** also includes neighbourhood commercial uses primarily located along Granville Street, which include most notably a RBC, along with a small contingent of local businesses.

Port Hawkesbury has a total ground level retail inventory (**Figure 3-6**) of approximately 772,712 sf with the Shopping Centre accounting for approximately 30% of the total (**Table 3-2**). The inventory measured against the local trade area it serves equates to a per capita ratio of 32 sf/capita, which is supportive and indicative of the urban-serving “hub” nature of the retail and commercial offering.

In terms of retail health, Port Hawkesbury, while having an older stock of retail buildings, has a very low vacancy at 1.5%. It should be noted that the exact vacancies in the enclosed shopping centre are excluded from this estimate and therefore, and based on anecdotal feedback, vacancy in the shopping centre’s inside component is evident. However, even if there were another 20,000 sf of vacant space in the shopping centre, the impact is not significant enough to bolster the overall vacancy rate beyond 4%, which is an industry benchmark for a healthy retail environment.

Along Reeves Street there are opportunities for some strategic infill development, particularly in the former KFC building and adjacent property facing the Causeway Shopping Centre as well as other smaller lots. Consideration may also be given for the possibility of RBC to relocate near to the recent new TD Bank along Reeves St.

Table 3-2. Port Hawkesbury Retail Inventory Summary

(Source: FBM)

STREETFRONT RETAIL & SERVICES BUSINESS MIX	GROUND LEVEL STREETFRONT INVENTORY SQ. FT.
ALCOHOL & TOBACCO	9,338
ARTS & ENTERTAINMENT	17,463
AUTO PARTS & ACCESSORIES	19,618
AUTO/RV/MOTORSPORTS DEALERSHIP	53,922
BOOKS & MULTI-MEDIA	750
FASHION & FOOTWEAR	1,000
FITNESS & LEISURE	0
FULL SERVICE F&B	36,867
GROCERY, CONVENIENCE & SPECIALTY FOODS	90,857
HEALTH & BEAUTY	0
HOME ELECTRONICS & APPLIANCES	0
HOME FURNISHINGS & DÉCOR	23,419
HOME IMPROVEMENT & GARDENING	50,671
JEWELRY	0
LIMITED SERVICE F&B	27,964
PERSONAL SERVICE	31,190
PHARMACY	17,466
PROFESSIONAL & FINANCIAL SERVICE	98,432
SPECIALTY RETAIL	32,356
SPORTING GOODS & OUTDOOR RECREATION	0
TOYS & HOBBIES	0
VACANT	11,400
PORT HAWKESBURY SHOPPING CENTRE	250,000
TOTAL	772,712

Figure 3-6. Port Hawkesbury Retail Inventory Images (February 2022)



3.5 Retail Demand

Quantifying the future potential retail demand for Port Hawkesbury utilized a more general methodology. Rather than examining the market capture by retail spending, the methodology took 3 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 2031. **Appendix B & C** provides documentation of detailed category spending for the Port Hawkesbury Trade Area.

Inventory Market Share Methodology

The first methodology, as shown in **Table 3-3** 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 Port Hawkesbury, if 100% of the trade area spending were captured, approximately 1.3 million sf of space would be supported. This is not realistic, but from this figure we can calculate that the current Port Hawkesbury (including nearby Port Hastings) inventory of 772,712 sf accounts for a market share of inventory of 60%. 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”. This high level methodology suggests an unmet potential of just under 65,000 sf, which given the vacancy levels in the community and the regional draw with current anchor tenants, is more than reasonable.

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 3-3** recognizes the “current calculated per capita floorspace” of 32.0 and applies a “target per capita” floorspace of 35.0 against the population by 2031, which is reasonable given the regional-serving context of Port Hawkesbury.

Visitor-Driven Demand Floorspace Methodology

The third input or consideration is the nature of tourism. As such, and based on the fact that Port Hawkesbury is less dependent on visitors as it is full time trade area residents, the demand for visitors is limited to just over 6,000 sf

Each of these approaches is then averaged to determine the total floorspace demand. In the case of Port Hawkesbury, the inventory market share methodology yields a demand estimate of 64,158 sf, while the per capita floorspace methodology yields a floorspace demand of 116,223 sf and visitor-driven demand at 6,006 sf. As a result, the combined average new floorspace demand in Port Hawkesbury by 2031 is estimated at 62,131 sf.

Table 3-3. Port Hawkesbury Retail Demand Summary (Source: FBM)

		PORT HAWKESBURY DEMAND ESTIMATE (10-year target to 2031)	
Inventory Market Share Methodology	Current inventory (sf)		772,712
	Current market share by inventory	60.0%	
	Target potential fair market share	65.0%	836,870
	Unmet Potential of fair market share(sf)		64,158
			<hr/>
Per Capita Floorspace Methodology	Current per capita floorspace est (sf/capita)	32.0	
	Target per capita (sf/capita)	35.0	
	Target retail based on per capita (sf)		889,000
	Unmet potential of per capita (sf)		116,288
		<hr/>	
	Visitor-Supported Floorspace Demand Forecast (sf)		5,946
		<hr/>	
TOTAL Resident + Visitor Floorspace Demand (sf)			62,131

3.6 Business Market Opportunities

From a marketing attraction perspective, the demand forecasts for Port Hawkesbury provide insights into the target types, formats and merchandise or brand categories that could or should be pursued to further solidify its place in the market as a regional destination for core goods and services.

The amount of future demand forecast in Port Hawkesbury presents immediate opportunities for action as well as planning for future infill and redevelopment.

Near term considerations should be engaging in discussions with RBC to find out their plans for possible relocation in the community along Reeves Street. With the recent completion of a new TD Bank and realizing that there are vacant lots across from the Causeway Shopping Centre, it would be in RBC's best interest to pursue relocating where they can cluster around like businesses and benefit from high visibility and access to the regional segment.

Unlike other smaller markets in Cape Breton Island, Port Hawkesbury has the opportunity to attract more branded or franchise model retailers in the community, either along Reeves Street or within available vacant spaces in the Port Hawkesbury Shopping Centre.

It is also worth observing that since enclosed mall shopping patterns have declined, the requisite amount of surface parking is no longer needed and therefore, the Port Hawkesbury Shopping Centre could benefit from creating pad site drive through or a smaller multi-tenant building with exposure to the highway. This could be a development in the range of 10,000 to 20,000 sf.

In examining the current business mix and spending patterns, as well as the forecasted demand estimates at over 60,000 sf, the following branded or franchise chains could be pursued for Port Hawkesbury as they are deemed compatible with the demographic composition, spending patterns and would be able to be competitive in the identified trade area:

Limited/Quick Service Food & Beverage:

Burger King (3,000 to 4,000 sf) with drive thru
Mary Brown's (1,500 to 2,000 sf) with drive thru
Popeye's Louisiana Chicken (2,500 - 3,000 sf) with drive thru
Chopped Leaf (1,000 to 1,250 sf)

Full Service Restaurants:

Cora's (1,500 to 2,500 sf)
Montana's Bar & Grill (5,000 to 7,000 sf)
Boston Pizza (5,000 to 7,000 sf)

Grocery & Convenience:

Bulk Barn (5,000 sf)
Supplement King (1,000 sf)
Cobs Bread (800 - 1,200 sf)

General Merchandise

Value Village (25,000 to 35,000 sf)
Dollar Tree (8,000 to 15,000 sf)
Great Canadian Dollar Store (5,000 sf)

Clothing & Fashion

Wearhouse One (2,000 to 3,000 sf)

Sporting Goods & Leisure

Cleve's Source For Sports (4,000 to 7,000 sf)
Sport Chek (10,000 to 15,000 sf)
Fit 4 Less (5,000 sf)
Goodlife Fitness (10,000 sf)

Pharmacy & Personal Services

Great Clips (800 to 1,000 sf)
Sport Clips (800 to 1,200 sf)
Lawton's (7,500 to 12,000 sf)

4.0 St. Peter's Retail Market Assessment

4.1 Introduction

As a community 'Where the Ocean Meets the Inland Sea', St. Peter's has played an important role in supporting the Cape Breton economy by enabling transportation between the Atlantic Ocean and Bras d'Or Lake via their historic canal. The 150 year old canal is a national historic site and local point of pride which is still accessible to small to medium vessels between May and October each year. In 2019, a new retail tourism hub called Canal Landing was announced in partnership with St. Peter's Economic Development Organization, Potlotek First Nation and Parks Canada. Inspired by Nicolas Denys' original trading post site, the Landing is bringing the communities together to support Potlotek youth, craft producers, and artisans. Canal Landing includes a gift shop, guided excursions on land and water, and recreational equipment rentals all aimed to create memorable and authentic experiences for visitors.

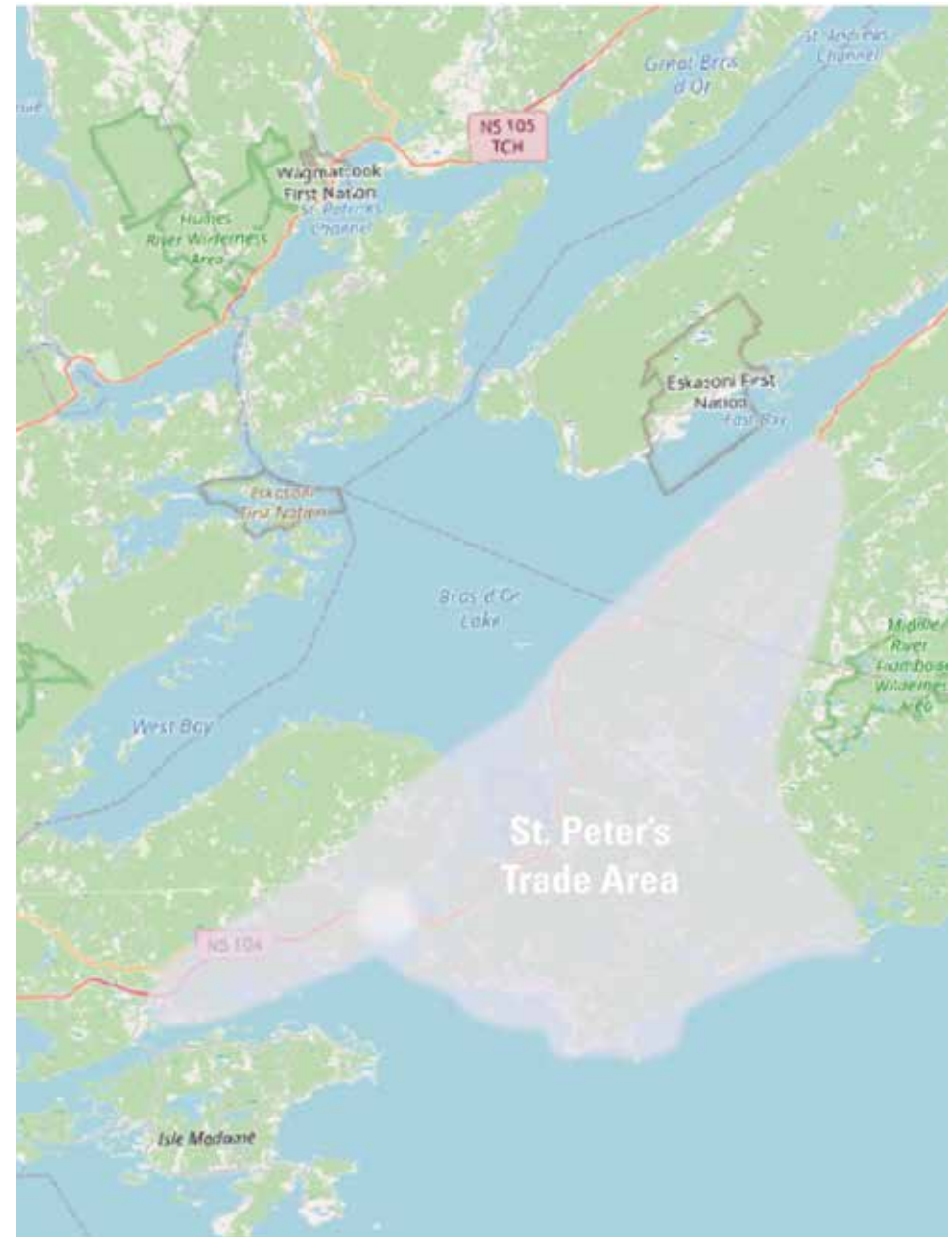
The Village of St. Peter's hosts a number of annual events including the Seaside Lobster Fest and Nicolas Denys Days which aim to bring visitors a taste of Cape Breton Island.

4.2 Trade Area

The Trade Area for St. Peter's is detailed in **Appendix A** and illustrated in **Figure 4-1**. Estimated for the end of year 2021, the St. Peter's Trade Area population is 5,379 with 39% falling into the "Joyful Country" lifestyle cluster (**Figure 4-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be older with a lower household income.

Previous population forecast represented a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline. In particular, current forecasts represent a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline, nor does it reflect the most recent Statistics Canada Federal Census release which has begun to show a much slower rate of decline and in fact is heading towards positive population growth over the next decade.

Figure 4-1. St. Peter's Trade Area



Forecast estimates for the Trade Area suggest that the population could grow from 5,379 to 5,200.

While this still illustrates a declining population, the rate of decline is becoming much less and it is entirely possible that with increasing urban housing prices elsewhere in the province and a desire for rural living increasing (as long as broadband connectivity is reliable and fast), that a community like St. Peter's with established services and a convenient drive to more urban markets like Port Hawkesbury or Sydney will become desirable.

4.3 Retail 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 2021 year end data.

Resident Trade Area Household Spending

Each of the major five categories of spending (Convenience, Comparison, Leisure, Auto and Online Sales) was assessed at a detailed category-by-category level then aggregated into major categories as shown in **Figure 4-3** for the St. Peter's Trade Area.

The St. Peter's Trade Area spending, as illustrated in **Table 4-1** is estimated at \$58 million in 2021 and is forecast to grow to \$60 million by 2026 and \$63 million by 2031.

Visitor Spending

Visitor Spending in St. Peter's is typically associated with day-trip visitors who are passing through the community's main street to or from visiting the picturesque canal, or for specific trips for events such as the annual Pirate Days.

While exact visitation figures to the community are not available, for the purposes of estimating visitor spending a figure of 100,000 visitors has been used.

This figure takes into account the typical visitor volumes at other Cape Breton destinations, such as Baddeck, which has a similar volume, but visitors to Baddeck tend to stay overnight, unlike the visitors to St. Peter's.

Accordingly, as summarized in **Table 4-1**, the estimated visitor spending in St. Peter's, which supplements the smaller local resident trade area, is approximately \$2 million per year on local goods and services in 2021, growing to \$2.4 million in 2026 and \$2.7 million by 2031.

4.4 Retail Inventory

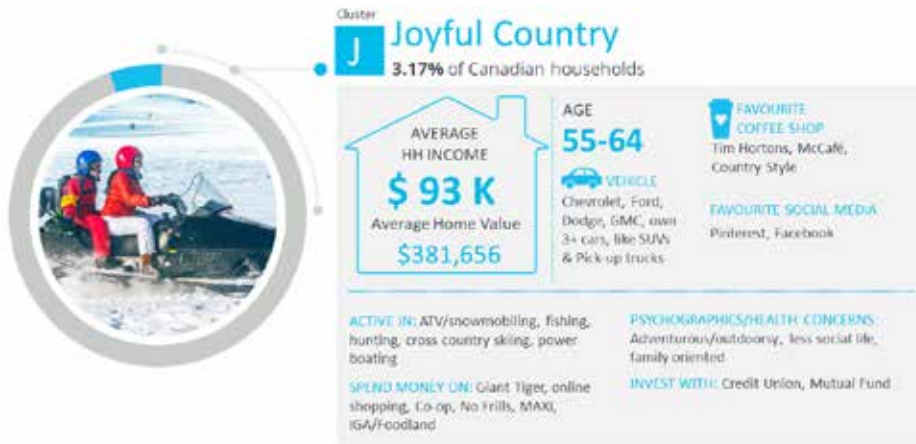
St. Peter's has a concentration of retail and public services along Grenville Street, also referred to as "main street" in the Village Core area between Deraymond St and the Canal. As a small community with clustered main street feel, it provides a strong contingent of day-to-day conveniences as represented on **Figure 4-4** and **Figure 4-5**. St. Peter's has a total ground level retail inventory of approximately 110,074 sf (**Table 4-2**). The inventory measured against the local trade area it serves equates to a per capita ratio of 20.5 sf/capita, which is almost exactly where the community should lie in terms of its retail space offering.

While the inventory in **Table 4-2** may seem heavy on home improvement, this is not uncommon in smaller communities where there is a Home Hardware, as these locally-owned branded businesses typically operate more as general merchandise stores that sell home furnishings, appliances as well as sporting goods and toys. Additionally, in the context of St. Peter's the adjoining business to the Home Hardware is a Great Canadian Dollar store which also has an array of local basic home needs.

The most prominent and notable vacancy includes the former NSLC building, while there are a few prime infill properties that are currently vacant lots along Grenville Street.

The current estimated vacancy rate in St. Peter's is less than 5% and mostly because of the latter NSLC building, though there are a couple other smaller vacant storefronts fronting Grenville Street.

Figure 4-2. Dominant Lifestyle Cluster in St. Peter's Trade Area



Across from the vacant NSLC at the high profile “four-corners” intersection of Grenville Street and Pepperell Street is a vacant lot currently used for surface parking.

Many of the available lots have high profile frontage along St. Peter’s main street and represent prime opportunities for infill.

4.5 Retail Demand

Quantifying the future potential retail demand for St. Peter’s utilized a more general methodology. Rather than examining the market capture by retail spending, the methodology took 3 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 2031. **Appendix B & C** provides documentation of detailed category spending for the St. Peter’s Trade Area.

Figure 4-3. St. Peter’s Trade Area Resident ONLY Retail Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

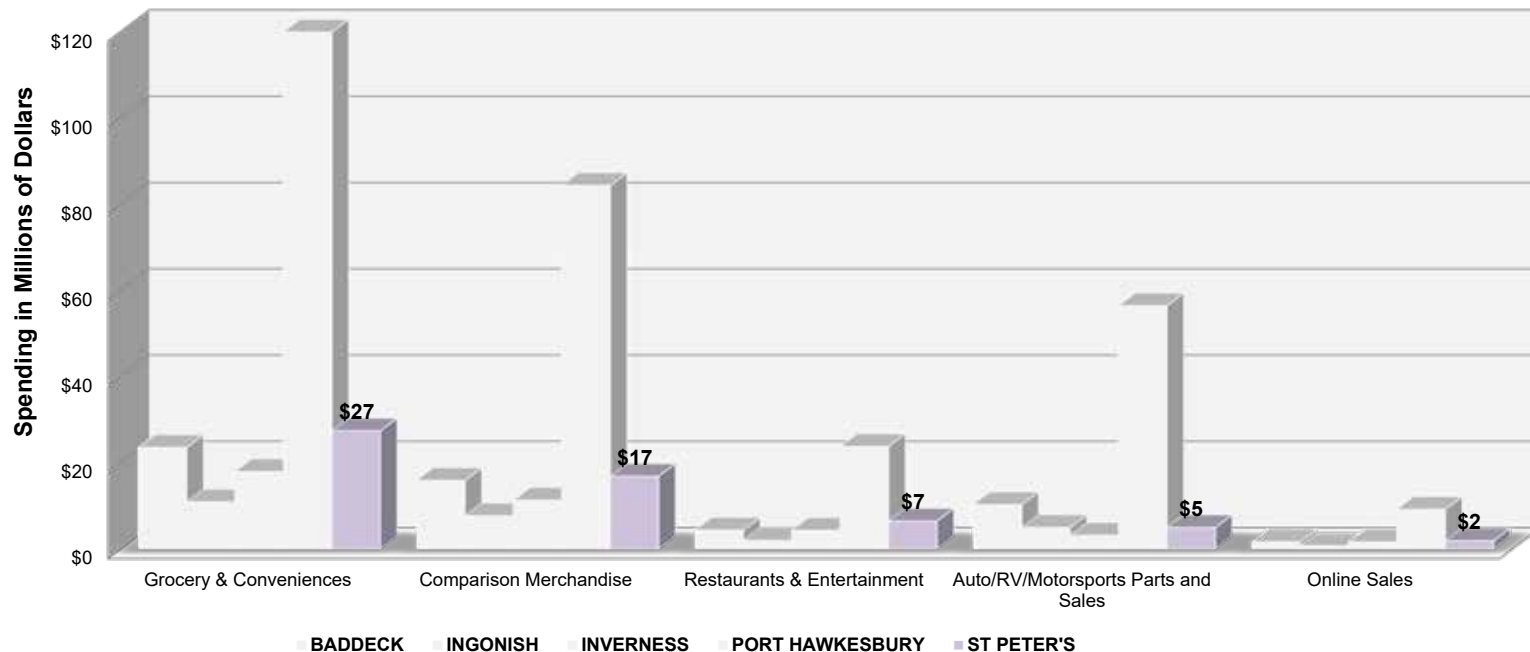


Table 4-1. St. Peter's Trade Area Resident AND Visitor Retail Household Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category		ST. PETER'S PRIMARY TRADE AREA + VISITOR SPENDING									% Change 2021 to 2031
		2021			2026			2031			
		ST. PETER'S VISITOR Aggregate Retail Spending	ST PETER'S TRADE AREA Aggregate Retail Spending	ST PETER'S TOTAL Visitor + Resident Spending	ST. PETER'S VISITOR Aggregate Retail Spending	ST PETER'S TRADE AREA Aggregate Retail Spending	ST. PETER'S TOTAL Visitor + Resident Spending	ST. PETER'S VISITOR Aggregate Retail Spending	ST PETER'S TRADE AREA Aggregate Retail Spending	ST. PETER'S TOTAL Visitor + Resident Spending	
Conveniences	Grocery & Convenience	\$100,000	\$17,881,653	\$17,981,653	\$120,189	\$18,527,008	\$18,647,197	\$136,083	\$19,105,997	\$19,242,079	7.0%
	Pharmacy	\$20,000	\$2,150,127	\$2,170,127	\$24,038	\$2,227,726	\$2,251,764	\$27,217	\$2,297,345	\$2,324,561	7.1%
	Alcohol & Tobacco (Incl Cannabis)	\$60,000	\$3,118,279	\$3,178,279	\$72,113	\$3,230,819	\$3,302,932	\$81,650	\$3,331,785	\$3,413,435	7.4%
	Personal Services	\$0	\$4,325,014	\$4,325,014	\$0	\$4,481,105	\$4,481,105	\$0	\$4,621,145	\$4,621,145	6.8%
	Fashion & Accessories	\$120,000	\$918,710	\$1,038,710	\$144,227	\$951,866	\$1,096,093	\$163,299	\$981,613	\$1,144,912	10.2%
	Jewelry	\$20,000	\$2,923,376	\$2,943,376	\$24,038	\$3,028,882	\$3,052,920	\$27,217	\$3,123,538	\$3,150,754	7.0%
Comparison	Health & Beauty	\$0	\$212,158	\$212,158	\$0	\$219,815	\$219,815	\$0	\$226,685	\$226,685	6.8%
	Home Furniture & Décor	\$20,000	\$1,145,164	\$1,165,164	\$24,038	\$1,186,493	\$1,210,531	\$27,217	\$1,223,572	\$1,250,789	7.3%
	Appliances & Electronics	\$0	\$1,442,118	\$1,442,118	\$0	\$1,494,165	\$1,494,165	\$0	\$1,540,859	\$1,540,859	6.8%
	Home Improvement & Gardening	\$0	\$2,488,428	\$2,488,428	\$0	\$2,578,236	\$2,578,236	\$0	\$2,658,808	\$2,658,808	6.8%
	Books & Media	\$20,000	\$6,217,051	\$6,237,051	\$24,038	\$6,441,426	\$6,465,464	\$27,217	\$6,642,728	\$6,669,944	6.9%
	Sporting Goods	\$0	\$620,959	\$620,959	\$0	\$643,369	\$643,369	\$0	\$663,475	\$663,475	6.8%
Leisure	Toys & Hobbies	\$40,000	\$405,326	\$445,326	\$48,076	\$419,955	\$468,030	\$54,433	\$433,079	\$487,512	9.5%
	Specialty Retail	\$100,000	\$566,409	\$666,409	\$120,189	\$586,851	\$707,040	\$136,083	\$605,191	\$741,273	11.2%
	Quick Service F&B	\$280,000	\$2,008,305	\$2,288,305	\$336,530	\$2,080,786	\$2,417,315	\$381,031	\$2,145,812	\$2,526,844	10.4%
	Restaurants & Pubs	\$600,000	\$1,427,212	\$2,027,212	\$721,135	\$1,478,720	\$2,199,855	\$816,495	\$1,524,932	\$2,341,427	15.5%
	Arts & Entertainment	\$180,000	\$2,942,508	\$3,122,508	\$216,340	\$3,048,704	\$3,265,045	\$244,949	\$3,143,980	\$3,388,928	8.5%
	Fitness & Leisure	\$20,000	\$175,154	\$195,154	\$24,038	\$181,475	\$205,513	\$27,217	\$187,146	\$214,363	9.8%
Auto	Auto Parts & Accessories and Fuel	\$420,000	\$522,507	\$942,507	\$504,794	\$541,365	\$1,046,159	\$571,547	\$558,283	\$1,129,830	19.9%
	Auto/RV/Motorsports Dealership	\$0	\$4,515,874	\$4,515,874	\$0	\$4,678,853	\$4,678,853	\$0	\$4,825,073	\$4,825,073	6.8%
TOTAL CATEGORIES		\$2,000,000.0	\$56,006,332	\$58,006,332	\$2,403,783.3	\$58,027,621	\$60,431,404	\$2,721,650.8	\$59,841,045	\$62,562,696	7.9%
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)		\$1,580,000.0	\$50,967,951	\$52,547,951	\$1,898,988.8	\$52,807,402	\$54,706,391	\$2,150,104.1	\$54,457,690	\$56,607,794	7.7%
TOTAL Online Sales			\$1,971,314								

Figure 4-4. St. Peter's Business Inventory Map (February 2022)



Table 4-2. St. Peter's Retail Inventory Summary

(Source: FBM)

STREETFRONT RETAIL & SERVICES BUSINESS MIX	GROUND LEVEL STREETFRONT INVENTORY SQ. FT.
ALCOHOL & TOBACCO	8,820
ARTS & ENTERTAINMENT	0
AUTO PARTS & ACCESSORIES	7,157
AUTO/RV/MOTORSPORTS DEALERSHIP	0
BOOKS & MULTI-MEDIA	0
FASHION & FOOTWEAR	0
FITNESS & LEISURE	6,426
FULL SERVICE F&B	6,484
GROCERY, CONVENIENCE & SPECIALTY FOODS	11,038
HEALTH & BEAUTY	0
HOME ELECTRONICS & APPLIANCES	750
HOME FURNISHINGS & DÉCOR	0
HOME IMPROVEMENT & GARDENING	20,072
JEWELRY	0
LIMITED SERVICE F&B	10,025
PERSONAL SERVICE	5,423
PHARMACY	1,000
PROFESSIONAL & FINANCIAL SERVICE	16,495
SPECIALTY RETAIL	11,384
SPORTING GOODS & OUTDOOR RECREATION	0
TOYS & HOBBIES	0
VACANT	5,000
TOTAL	110,074

Table 4-3. St. Peter's Retail Demand Summary

(Source: FBM)

		ST. PETER'S DEMAND ESTIMATE (10-year target to 2031)
Inventory Market Share Methodology	Current inventory (sf)	110,074
	Current market share by inventory	47.2%
	Target potential fair market share	50.0% 116,524
	Unmet Potential of fair market share(sf)	6,450
	Per Capita Floorspace Methodology	
Current per capita floorspace est (sf/capita)	20.5	
Target per capita (sf/capita)	20.0	
Target retail based on per capita (sf)	104,000	
Unmet potential of per capita (sf)	-6,074	
Visitor-Supported Floorspace Demand Forecast (sf)		11,893
TOTAL Resident + Visitor Floorspace Demand (sf)		4,090

Figure 4-5. St. Peter's Retail Inventory Images (February 2022)



Inventory Market Share Methodology

The first methodology, as shown in **Table 4-3** 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 St. Peter's, if 100% of the trade area spending were captured, approximately 233,000 sf of space would be supported.

This is not realistic, but from this figure we can calculate that the current St. Peter's inventory of 110,764 sf accounts for a market share of inventory of 47.2%. 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". This high level methodology suggests an unmet potential of just under 6,450 sf. The market share figure of 47% is realistic given that residents of St. Peter's have choices to travel conveniently within a 30-minute drive to either Port Hawkesbury or Sydney for a greater selection of non-urgent conveniences, personal services and bigger ticket items like furniture or automobiles.

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 4-3** recognizes the "current calculated per capita floorspace" of 20.5 and applies a "target per capita" floorspace of 20.0 against the population by 2031. In other words, since St. Peter's currently has a relatively balanced inventory to population mix, there is no need to further push the per capita ratio.

Visitor-Driven Demand Floorspace Methodology

The third input or consideration is the nature of tourism. As such, and based on the fact that St. Peter's is not heavily reliant on visitors as it is full time trade area residents, the demand for visitors is limited to just over 12,000 sf

Each of these approaches is then averaged to determine the total floorspace demand. In the case of St. Peter's, the inventory market share methodology yields a demand estimate of 6,450 sf, while the per

capita floorspace methodology yields a floorspace demand of 188 sf and visitor-driven demand at 12,012 sf. As a result, the combined average new floorspace demand in St. Peter's by 2031 is estimated at 4,090 sf.

4.6 Business Market Opportunities

Demand forecasts for St. Peter's provide insights into the target types, formats and merchandise store types that could or should be pursued to further solidify its place in the market as a regional destination for core goods and services.

When looking at the future conservative demand estimates at 4,100 sf, it is reasonable to see that this amount of ground-oriented, street fronting retail could reasonably be accommodated in a range of owner-occupied or multi-tenant buildings with spaces ranging from 500 sf to 1,500 sf.

In addition to new demand, which could be ideally accommodated on the available infill properties along Grenville Street, the vacant former NSLC Building should be actively pursued for adaptive re-use as a craft brewery/distillery restaurant with an outdoor seating area fronting the main street with exposure to Memorial Park. Even in the interim, the space should be adaptively used as a local indoor weekend market space for home-based businesses to use or as a vendor cooperative to support local food producers, crafters and artisans. This could involve welcoming the Potlotek First Nation to establish an interactive cultural workshop space, perhaps as part of the adaptive re-use or temporary use of the former NSLC Building.

Because St. Peter's is however along a well-traveled vehicle and transport corridor, there is the potential to have interest for another branded quick serve food & beverage operator, like an A&W, most likely at the north end of town near the canal.

5.0 Inverness Retail Market Assessment

5.1 Introduction

The community of Inverness is well known for its sandy beach and boardwalk which are major attractions for visitors going to or from the Cabot Trail and Cape Breton Highlands to the north. With its Mobi-Mats and Mobi-Chairs, Inverness Beach has been touted as one of the most accessible beaches in Atlantic Canada.

For recreational and avid golfers alike, Cabot Links is a popular destination ranked amongst Golf Digest World's 100 Greatest Golf Courses. There are in fact 3 courses; two 18-hole globally acclaimed courses at Cabot Cliffs and Cabot Links, and the Nest, which is a 9-hole par 3. The courses are located with easy access to shops and services. Other recreational opportunities include cycling, which continues to increase in its popularity, for which Inverness is becoming a "base camp" for cycling tour operators. As Cape Breton continues to move forward with an island-wide cycling strategy for both road, trail and mountain bike riders, the Inverness area will continue to grow.

For the food & beverage aficionados, minutes south of Inverness is the world famous Glenora Inn & Distillery, which is a further activity driver for the community of Inverness. Recreationally, Inverness Raceway hosts live horse racing action from June until October, attracting race fans from across the Maritime Provinces. Plans have also been announced for an Inverness Outdoor Recreation Facility, including accessible pathways, as well as pickle ball and basketball courts to serve the entire region for tournaments, inter-school play and tourists alike.

The challenge for Inverness is that each of these visitor components, is highly seasonal, leaving the fall and winter more critically dependent upon local residents for local businesses, some of whom close during this time frame.

For the residents of Inverness, the town has a number of community services including the Inverness Education Centre/Academy and the Inverness Consolidated Hospital which serves western Cape Breton.

Figure 5-1. Inverness Trade Area



5.2 Trade Area

The Trade Area for Inverness is detailed in **Appendix A** and illustrated in **Figure 5-1**.

Estimated for the end of year 2021, the Inverness resident Trade Area population is only 3,485 within which 74% can be categorized as Urban Life in Small Town lifestyle cluster (**Figure 5-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be older with a lower household income, although the visitor profile is that of a much more affluent spending segment.

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. In particular, current forecasts represent a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline, nor does it reflect the most recent Statistics Canada Federal Census release which has begun to show a much slower rate of decline and in fact is heading towards positive population growth over the next decade. Forecast estimates for the Trade Area suggest that the population could grow marginally from 3,485 to approximate 3,500. While this may seem insignificant, it is quite the opposite given the historic population declines seen over the past 20+ years. Inverness, with its pristine coastline beauty and recreational haven, is poised to attract international residents, who may not be full-time residents, but who will acquire property and be affluent, willing spenders and investors in the community at large.

5.3 Retail 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 2021 year end data.

Trade Area Resident Household Spending

Each of the major five categories of spending (Convenience, Comparison, Leisure, Auto and Online Sales) was assessed at a detailed category-by-category level then aggregated into major categories as shown in **Figure 5-3** for the Inverness Trade Area.

The Inverness Trade Area spending, as illustrated in **Table 5-1** is estimated at \$48 million in 2021 and is forecast to grow to \$52 million by 2026 and \$55 million by 2031.

Visitor Spending

Visitor Spending in Inverness has long been a part of the community as a gateway to the Cape Breton Highlands. However over the past decade, Inverness has established itself as not only the gateway, but the launching pad for outdoor recreation and food & beverage exploration.

Consequently domestic and global tourism is redefining Inverness, where more affluent visitors are now spending more time in the local market. Specifically relating to Inverness' golfing mecca, In 2019 alone, 15,000 people played 43,000 rounds of golf, and as of March 2022, over 45,000 rounds have been booked for 2022. Season occupancy for the courses is 97% with 53% already booked for 2023.

Typical tourism figures for Cape Breton Island may not accurately depict the number of annual visitors to Inverness. But realizing the nature of the destination visitor product in the area (i.e. Cabot Cliffs and Glenora Inn & Distillery), our analysis examined data from the golf course in order to provide a best-case estimate of the above noted visitor spending, realizing that the recreational spend and resulting food & beverage spend patterns in Inverness are higher than elsewhere in the Cape Breton Island, even though the volume of visitors may not be as high as some other areas.

INVERNESS GOLFING VISITOR SUMMARY	Cape Breton Resident Golf Rounds	Nova Scotia Resident Golf Rounds	Other Visitor Golf Rounds	TOTAL Golf Rounds
Cabot Links	560	594	19,333	20,487
Cabot Cliffs	854	1,024	20,037	21,915
TOTAL Golf Rounds	1,414	1,618	39,370	42,402
Total Estimated Green Fee \$	\$275,730	\$315,510	\$7,677,150	\$8,268,390

Figure 5-2. Dominant Lifestyle Cluster in Inverness Trade Area



From this baseline, we can start to portray the visitor spending in Inverness. Therefore, spending has been based on an estimated annual visitor base of a conservative 75,000 non-resident visitors staying a minimum of 2 days in Inverness.

Accordingly, as summarized in **Table 5-1**, the estimated visitor spending in Inverness, which supplements the smaller local resident trade area, is approximately \$10.9 million per year on local goods and services and recreational amenities in 2021, growing to \$13.1 million in 2026 and \$14.8 million by 2031.

Figure 5-3. Inverness Trade Area Retail Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

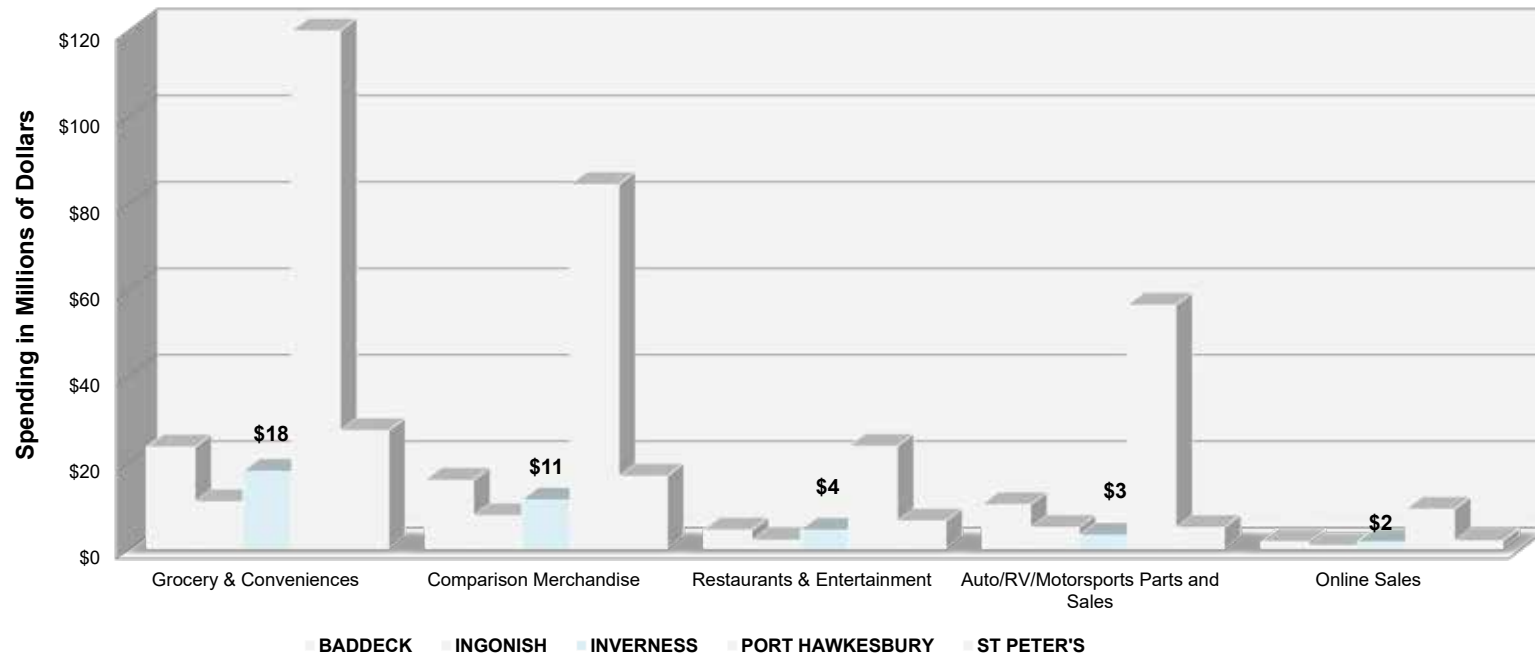


Table 5-1. Inverness Trade Area Resident AND Visitor Retail Household Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category		INVERNESS PRIMARY TRADE AREA + VISITOR SPENDING									% Change 2021 to 2031
		2021			2026			2031			
		INVERNESS VISITOR Aggregate Retail Spending	INVERNESS TRADE AREA Aggregate Retail Spending	INVERNESS TOTAL Visitor + Resident Spending	INVERNESS VISITOR Aggregate Retail Spending	INVERNESS TRADE AREA Aggregate Retail Spending	INVERNESS TOTAL Visitor + Resident Spending	INVERNESS VISITOR Aggregate Retail Spending	INVERNESS TRADE AREA Aggregate Retail Spending	INVERNESS TOTAL Visitor + Resident Spending	
Conveniences	Grocery & Convenience	\$150,000	\$11,643,824	\$11,793,824	\$178,499	\$12,179,396	\$12,357,895	\$202,103	\$12,762,319	\$12,964,422	9.9%
	Pharmacy	\$30,000	\$1,344,351	\$1,374,351	\$35,700	\$1,406,186	\$1,441,886	\$40,421	\$1,473,488	\$1,513,908	10.2%
	Alcohol & Tobacco (Incl Cannabis)	\$90,000	\$2,074,806	\$2,164,806	\$107,099	\$2,170,239	\$2,277,338	\$121,262	\$2,274,110	\$2,395,371	10.7%
	Personal Services	\$0	\$2,984,691	\$2,984,691	\$0	\$3,121,976	\$3,121,976	\$0	\$3,271,398	\$3,271,398	9.6%
	Fashion & Accessories	\$180,000	\$615,424	\$795,424	\$214,199	\$643,731	\$857,930	\$242,523	\$674,541	\$917,064	15.3%
	Jewelry	\$30,000	\$2,032,273	\$2,062,273	\$35,700	\$2,125,749	\$2,161,449	\$40,421	\$2,227,491	\$2,267,911	10.0%
	Health & Beauty	\$0	\$142,324	\$142,324	\$0	\$148,871	\$148,871	\$0	\$155,996	\$155,996	9.6%
Comparison	Home Furniture & Décor	\$30,000	\$752,837	\$782,837	\$35,700	\$787,465	\$823,165	\$40,421	\$825,154	\$865,575	10.6%
	Appliances & Electronics	\$0	\$1,010,791	\$1,010,791	\$0	\$1,057,284	\$1,057,284	\$0	\$1,107,887	\$1,107,887	9.6%
	Home Improvement & Gardening	\$0	\$1,627,274	\$1,627,274	\$0	\$1,702,123	\$1,702,123	\$0	\$1,783,589	\$1,783,589	9.6%
	Books & Media	\$30,000	\$3,920,199	\$3,950,199	\$35,700	\$4,100,513	\$4,136,213	\$40,421	\$4,296,770	\$4,337,190	9.8%
	Sporting Goods	\$0	\$673,093	\$673,093	\$0	\$704,053	\$704,053	\$0	\$737,750	\$737,750	9.6%
	Toys & Hobbies	\$60,000	\$272,294	\$332,294	\$71,400	\$284,818	\$356,218	\$80,841	\$298,450	\$379,291	14.1%
	Specialty Retail	\$150,000	\$371,909	\$521,909	\$178,499	\$389,016	\$567,515	\$202,103	\$407,635	\$609,737	16.8%
Leisure	Quick Service F&B	\$420,000	\$1,449,508	\$1,869,508	\$499,797	\$1,516,180	\$2,015,976	\$565,888	\$1,588,746	\$2,154,634	15.3%
	Restaurants & Pubs	\$900,000	\$941,478	\$1,841,478	\$1,070,993	\$984,782	\$2,055,775	\$1,212,617	\$1,031,915	\$2,244,532	21.9%
	Arts & Entertainment	\$270,000	\$1,911,733	\$2,181,733	\$321,298	\$1,999,666	\$2,320,963	\$363,785	\$2,095,373	\$2,459,158	12.7%
	Fitness & Leisure	\$8,000,000	\$108,536	\$8,108,536	\$9,519,934	\$113,529	\$9,633,462	\$10,778,815	\$118,962	\$10,897,777	34.4%
Auto	Auto Parts & Accessories and Fuel	\$630,000	\$351,722	\$981,722	\$749,695	\$367,900	\$1,117,595	\$848,832	\$385,508	\$1,234,340	25.7%
	Auto/RV/Motorsports Dealership	\$0	\$2,887,130	\$2,887,130	\$0	\$3,019,927	\$3,019,927	\$0	\$3,164,465	\$3,164,465	9.6%
TOTAL CATEGORIES		\$10,970,000	\$37,116,195	\$48,086,195	\$13,054,209	\$38,823,402	\$51,877,612	\$14,780,450	\$40,681,546	\$55,461,996	15.3%
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)		\$10,340,000	\$33,877,343	\$44,217,343	\$12,304,515	\$35,435,575	\$47,740,090	\$13,931,618	\$37,131,573	\$51,063,191	15.5%
TOTAL Online Sales			\$1,720,535								

Figure 5-4. Inverness Business Inventory Map (February 2022)



Table 5-2. Inverness Retail Inventory Summary

(Source: FBM)

STREETFRONT RETAIL & SERVICES BUSINESS MIX	GROUND LEVEL STREETFRONT INVENTORY SQ. FT.
ALCOHOL & TOBACCO	5,985
ARTS & ENTERTAINMENT	0
AUTO PARTS & ACCESSORIES	0
AUTO/RV/MOTORSPORTS DEALERSHIP	0
BOOKS & MULTI-MEDIA	750
FASHION & FOOTWEAR	2,000
FITNESS & LEISURE	5,259
FULL SERVICE F&B	13,458
GROCERY, CONVENIENCE & SPECIALTY FOODS	17,389
HEALTH & BEAUTY	0
HOME ELECTRONICS & APPLIANCES	0
HOME FURNISHINGS & DÉCOR	1,561
HOME IMPROVEMENT & GARDENING	13,726
JEWELRY	0
LIMITED SERVICE F&B	16,062
PERSONAL SERVICE	1,722
PHARMACY	7,360
PROFESSIONAL & FINANCIAL SERVICE	16,375
SPECIALTY RETAIL	8,313
SPORTING GOODS & OUTDOOR RECREATION	0
TOYS & HOBBIES	0
VACANT	6,000
TOTAL	115,960

5.4 Retail Inventory

Commercial businesses in Inverness are clustered along an approximately 1km stretch of Central Avenue, presenting a well defined main street feel with many storefronts located close to the street (**Figure 5-4**).

Larger stores, including Kent Building Supplies and Inverness Co-op, are set back further from the street with parking lots visible to the street (**Figure 5-5**). A variety of day-to-day conveniences are provided in Inverness, with Port Hawkesbury located approximately 75 min drive time away for larger purchases, or Sydney at almost 90 minutes or more, depending on season and road conditions.

Inverness has a total ground level inventory of 115,960 sf (**Table 5-2**). The inventory measured against the local trade it serves equates to a per capita ratio of 33 sf/capita, which indicates that the community does have more retail than a comparably sized community would normally have (i.e. 15 to 20 sf/capita). This however points towards the role that tourism plays in its provision of shops and services.

At the southern end of Central Avenue lies the new three-story mixed use Company House which has 10 local companies (including A Small Town Deli on the ground floor) as well as short-term residential accommodations. With short and long term shared work space available, the Company House can serve as a flexible business incubation space which speaks to evolving work dynamics.

At the northern end of Central Avenue, there is a large undeveloped lot, and a new commercial building (currently partially occupied by Service Canada) which has a unit available for lease. The current estimated vacancy of Inverness is around 5%, but that is mostly attributable to the new building that is currently leasing.

Figure 5-5. Inverness Retail Inventory Images (February 2022)



Table 5-3. Inverness Retail Demand Summary

(Source: FBM)

		INVERNESS DEMAND ESTIMATE (10-year target to 2031)
Inventory Market Share Methodology	Current inventory (sf)	115,960
	Current market share by inventory	73.9%
	Target potential fair market share	75.0%
	Unmet Potential of fair market share(sf)	1,765
Per Capita Floorspace Methodology	Current per capita floorspace est (sf/capita)	33.3
	Target per capita (sf/capita)	30.0
	Target retail based on per capita (sf)	105,000
	Unmet potential of per capita (sf)	-10,960
	Visitor-Supported Floorspace Demand Forecast (sf)	31,903
	TOTAL Resident + Visitor Floorspace Demand (sf)	7,569

5.5 Retail Demand

Quantifying the future potential retail demand for Inverness utilized a more general methodology. Rather than examining the market capture by retail spending, the methodology took 3 approaches and then created an average of the three to determine the approximate demand. Additionally, the demand for this community looks toward a 10-year horizon to the year 2031. **Appendix B & C** provides documentation of detailed category spending for the Inverness Trade Area.

Inventory Market Share Methodology

The first methodology, as shown in **Table 5-3** 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 Inverness, if 100% of the trade area spending were captured, approximately 157,000 sf of space would be supported.

This is not realistic based on the resident population base only, but from this figure we can calculate that the current Inverness inventory of 115,960 sf accounts for a market share of inventory of almost 74%, which is high but again represents the fact that tourism and visitor spending is economic engine for the community. Based on this calculated “current market by inventory” estimate a “target potential market share” is applied at 75% to keep with the current levels.

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”. This high level methodology suggests an unmet potential of only 1,765 sf. The market share figure of 75% is realistic because of the drive times to the nearest urban markets are at least 75 minutes drive time, which means that local necessities are paramount.

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 5-3** recognizes the “current calculated per capita floorspace” of 33 and applies a “target per capita” floorspace of 30, which is realistic for the Inverness resident and tourist market against the population by 2031. This results in a negative amount of space (-4,598 sf), which is simply a stabilization of supportable resident demand.

Visitor-Driven Demand Floorspace Methodology

The third input or consideration is the nature of tourism. As such, and recognizing the economic impact that tourism has for Inverness, demand attributable to the visitors is estimated to be almost 27,500 sf by 2031.

Each of these approaches is then averaged so as to not place too much reliance on tourism, but rather to enable more year-round vibrancy for existing and new businesses in Inverness.

In the case of Inverness, the inventory market share methodology yields a demand estimate of 1,765 sf, while the per capita floorspace methodology yields a floorspace demand of -4,598 sf and visitor-driven demand at 31,903 sf. As a result, the combined average demand in Inverness by 2031 is estimated at 7,569 sf. This figure is seen to be a fair and reasonable amount of space to accommodate fresh new retail additions in the Inverness community by 2031, while not impacting existing businesses and not placing too much over-reliance on seasonal tourism businesses that would be closed in the shoulder or non-peak seasons, and therefore portray the feel of “closed” atmosphere.

5.6 Business Market Opportunities

Inverness should look to a market like Tofino on Vancouver Island as a comparable destination that has embraced the storm-watching season to effectively round out its seasonality, while also becoming a mecca for outdoor pursuits and a refined, locally-sourced and upscale food & beverage culture, while simultaneously embracing the local residents.

With forecasts for conservatively 8,000 to 10,000 sf of new retail floorspace this demand could be divided into units of 1,000 to 3,000 sf which would provide for strategic well-placed merchandise store types. Inverness has the opportunity to become a recreational outfitter destination featuring bike, golf, ski and kayak rentals or instruction. Additionally, the visitor profile would suggest that an upscale “foodie hub” comprised of finer dining would be met with success, as would more upscale cafe bistro concepts. Much like Cheticamp has L’abri cafe, Inverness could notch up the caliber of dining.

Other category opportunities that may have smaller space requirements could include a domestic retailer like Peace by Chocolate may be enticed to set up a seasonal pop-up in the village.

In addition to retail, and as an environmentally prestigious and promoted region, EV Charging stations should be introduced as a further enticement to attract and retain guests and visitors.

6.0 Ingonish Retail Market Assessment

6.1 Introduction

Ingonish is a collection of five coastal communities located along the Cabot Trail in northern Cape Breton. Beginning in the south the communities are Ingonish Ferry, Ingonish Harbour, Ingonish Beach, Ingonish Centre, ending with Ingonish in the north. The Ingonish census division of 2,567 people is administered as part of the Municipality of Victoria County.

Ingonish is home to several iconic tourist attractions like Keltic Lodge, Cape Breton Highland Links, and Destination Cape Smokey which is home to Atlantic Canada's first gondola. Ingonish is encircled by the Cape Breton Highlands National Park and Cape Smokey Provincial Park, requiring visitors to enter and leave a park to access the community. Despite the remote location, 300,906 visitors traveled to the Cape Breton Highlands National Park in 2019-2020. Regaining lost visitor numbers due to the COVID-19 pandemic is essential to maintain the vibrancy of Ingonish.

6.2 Trade Area

The Trade Area for Ingonish is detailed in **Appendix A** and illustrated in **Figure 6-1**. Estimated for the end of year 2021, the Ingonish Trade Area population is 2,279 with 57% falling within the Rural Handyman lifestyle cluster (**Figure 6-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be older with a lower household income. As is the challenge for many smaller Nova Scotian communities, the population in these areas is anticipated to decline by 0.91% per year over the next three years.

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. In particular, current forecasts represent a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline, nor does it reflect the most recent Statistics Canada Federal Census release which has begun to show a much slower rate of decline, though because of Ingonish's somewhat isolated context, the decline may still transpire, but at slower rates than in the past.

Figure 6-1. Ingonish Trade Area



Forecast estimates for the Trade Area suggest that the population could remain relatively stable, with a marginal decline from 2,279 to approximate 2,000 in 2031.

There is an expectation that seasonal second-home properties will become more common in the Ingonish area, as evidenced by the recent surge in recreational property prices and property acquisitions/interest from out-of-province and international home-seekers.

6.3 Retail 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 2021 year end data.

Trade Area Resident Household Spending

Each of the major five categories of spending (Convenience, Comparison, Leisure, Auto and Online Sales) was assessed at a detailed category-by-category level then aggregated into major categories as shown in **Figure 6-3** for the Ingonish Trade Area.

The Ingonish Trade Area spending, as illustrated in **Table 6-1** is estimated at \$28 million in 2021 and is forecast to grow to \$30 million by 2026 and \$31 million by 2031.

Visitor Spending

Because of Ingonish's location on the Cabot Trail and as the last community before/after the Provincial Park gates, the community is a popular rest stop for overnight visitors.

Estimates for the Cape Breton Highlands for 2018-2019 indicated that there were 295,456 visitors. Typically, the visitors of Ingonish are roughly mirrored by the Cape Breton Highlands visitors, since they go through the Ingonish area.

Ingonish has a number of accommodations formats that comprise the various Ingonish areas including north Ingonish and Ingonish Beach; the latter of which is where visitor destinations such as Keltic Lodge and Cape Smokey are located.

Accordingly, as summarized in **Table 6-1**, and for the purposes of this study, we used an estimated annual visitor catchment for Ingonish of 150,000 visitors with a total duration averaging 1 day. Even though there are a number of accommodations in the area, the current offering of shops and services is somewhat limited, as evidenced in the forthcoming retail inventory. Consequently, the resulting estimated visitor spending in Ingonish, which supplements the smaller local resident trade area, is approximately \$3.0 million per year on local goods and services and recreational amenities in 2021, growing to \$3.6 million in 2026 and \$4.1 million by 2031.

Unlike Inverness, which has more concentrated cluster of retail activity, the dispersed nature of business in Ingonish is a factor in the current limited ability to intercept visitor spending. If however, retail activity can become more concentrated or actively promoted, such as at a base village at Cape Smokey, then there is a strong opportunity to intercept visitors and have them spend more in Ingonish.

6.4 Retail Inventory

Retail in Ingonish is primarily located in Ingonish proper (referred to as Ingonish-north in figure **Figure 6-4**) with its Freshmart and Rona, and Ingonish Beach (**Figure 6-5**), with its Home Hardware, Canada Post, Scotiabank and NSLC. The dispersed nature of the community means visitors and residents often rely on vehicles to travel between stores. There is a high number of seasonal accommodations providers in Ingonish, as well as seasonal food vendors (**Figure 6-6**). Basic essentials are provided in Ingonish, however residents must travel to larger urban centres like Sydney for larger purchases.

Ingonish has a total ground level inventory of 51,929 sf for Ingonish North\Ingonish Beach (**Table 6-2**). The inventory measured against the local trade area it serves equates to a per capita ratio of 22.8 sf/capita, which is actually fair and balanced with the size of the resident trade area.

Vacancy is estimated to be zero in Ingonish, but the biggest challenge faced is the inconsistency of business hours and staffing.

Figure 6-2. Dominant Lifestyle Cluster in Ingonish Trade Area



6.5 Retail Demand

Quantifying the future potential retail demand for Ingonish utilized a more general methodology. Rather than examining the market capture by retail spending, the methodology took 3 approaches and then created an average of the three to determine the approximate demand. Additionally, the demand for this community looks toward a 10-year horizon to the year 2031. **Appendix B & C** provides documentation of detailed category spending for the Ingonish Trade Area.

Inventory Market Share Methodology

The first methodology, as shown in **Table 6-3** 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.

Figure 6-3. Ingonish Trade Area Resident ONLY Retail Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

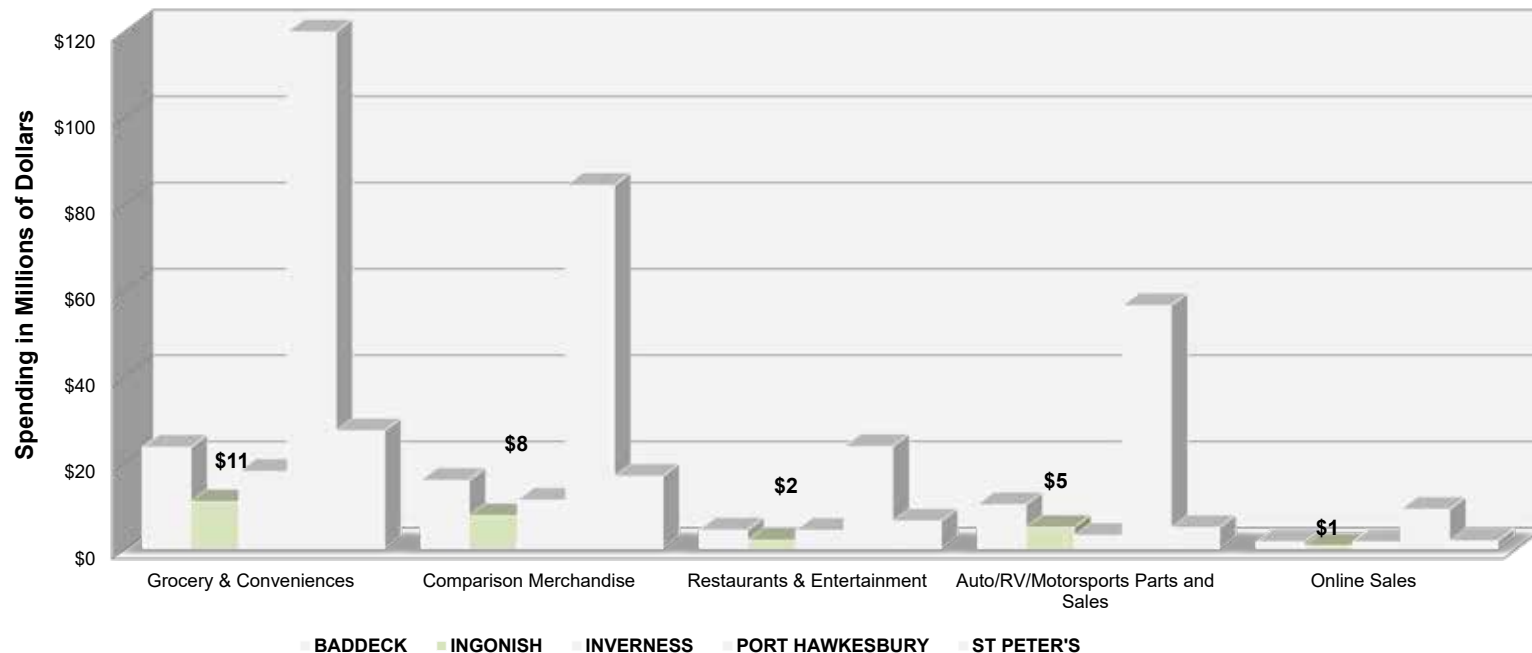


Table 6-1. Ingonish Trade Area Resident AND Visitor Retail Household Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category		INGONISH PRIMARY TRADE AREA + VISITOR SPENDING								
		2021			2026			2031		
		INGONISH VISITOR Aggregate Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INGONISH TOTAL Visitor + Resident Spending	INGONISH VISITOR Aggregate Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INGONISH TOTAL Visitor + Resident Spending	INGONISH VISITOR Aggregate Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INGONISH TOTAL Visitor + Resident Spending
Conveniences	Grocery & Convenience	\$150,000	\$7,047,853	\$7,197,853	\$180,284	\$7,209,647	\$7,389,930	\$204,124	\$7,273,127	\$7,477,251
	Pharmacy	\$30,000	\$796,651	\$826,651	\$36,057	\$814,939	\$850,996	\$40,825	\$822,115	\$862,940
	Alcohol & Tobacco (Incl Cannabis)	\$90,000	\$1,322,419	\$1,412,419	\$108,170	\$1,352,777	\$1,460,947	\$122,474	\$1,364,688	\$1,487,162
	Personal Services	\$0	\$1,855,410	\$1,855,410	\$0	\$1,898,004	\$1,898,004	\$0	\$1,914,716	\$1,914,716
	Fashion & Accessories	\$180,000	\$1,289,134	\$1,469,134	\$216,340	\$1,318,728	\$1,535,068	\$244,949	\$1,330,339	\$1,575,288
	Jewelry	\$30,000	\$89,721	\$119,721	\$36,057	\$91,781	\$127,838	\$40,825	\$92,589	\$133,414
Comparison	Health & Beauty	\$0	\$467,817	\$467,817	\$0	\$478,557	\$478,557	\$0	\$482,770	\$482,770
	Home Furniture & Décor	\$30,000	\$615,668	\$645,668	\$36,057	\$629,802	\$665,859	\$40,825	\$635,347	\$676,172
	Appliances & Electronics	\$0	\$1,049,764	\$1,049,764	\$0	\$1,073,863	\$1,073,863	\$0	\$1,083,318	\$1,083,318
	Home Improvement & Gardening	\$0	\$2,673,007	\$2,673,007	\$0	\$2,734,370	\$2,734,370	\$0	\$2,758,446	\$2,758,446
	Books & Media	\$30,000	\$303,840	\$333,840	\$36,057	\$310,815	\$346,872	\$40,825	\$313,552	\$354,377
	Sporting Goods	\$0	\$192,566	\$192,566	\$0	\$196,986	\$196,986	\$0	\$198,721	\$198,721
	Toys & Hobbies	\$60,000	\$236,323	\$296,323	\$72,113	\$241,748	\$313,862	\$81,650	\$243,877	\$325,526
	Specialty Retail	\$150,000	\$867,699	\$1,017,699	\$180,284	\$887,619	\$1,067,902	\$204,124	\$895,434	\$1,099,558
	Quick Service F&B	\$420,000	\$594,084	\$1,014,084	\$504,794	\$607,722	\$1,112,517	\$571,547	\$613,073	\$1,184,620
	Restaurants & Pubs	\$900,000	\$1,179,948	\$2,079,948	\$1,081,702	\$1,207,035	\$2,288,738	\$1,224,743	\$1,217,663	\$2,442,406
Leisure	Arts & Entertainment	\$270,000	\$66,405	\$336,405	\$324,511	\$67,929	\$392,440	\$367,423	\$68,527	\$435,950
	Fitness & Leisure	\$30,000	\$236,877	\$266,877	\$36,057	\$242,315	\$278,371	\$40,825	\$244,448	\$285,273
	Auto Parts & Accessories and Fuel	\$630,000	\$1,871,226	\$2,501,226	\$757,192	\$1,914,183	\$2,671,374	\$857,320	\$1,931,037	\$2,788,357
Auto	Auto/RV/Motorsports Dealership	\$0	\$3,198,614	\$3,198,614	\$0	\$3,272,043	\$3,272,043	\$0	\$3,300,853	\$3,300,853
	TOTAL CATEGORIES	\$3,000,000	\$25,955,027	\$28,955,027	\$3,605,675	\$26,550,861	\$30,156,536	\$4,082,476	\$26,784,640	\$30,867,116
	TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$2,370,000	\$20,885,187	\$23,255,187	\$2,848,483	\$21,364,636	\$24,213,119	\$3,225,156	\$21,552,751	\$24,777,907
	TOTAL Online Sales		\$836,120							

Figure 6-4. Ingonish North Business Inventory Map (February 2022)



Figure 6-5. Ingonish Beach Business Inventory Map (February 2022)



Table 6-2. Ingonish Retail Inventory Summary

(Source: FBM)

STREETFRONT RETAIL & SERVICES BUSINESS MIX	GROUND LEVEL STREETFRONT INVENTORY SQ. FT.
ALCOHOL & TOBACCO	6,191
ARTS & ENTERTAINMENT	0
AUTO PARTS & ACCESSORIES	0
AUTO/RV/MOTORSPORTS DEALERSHIP	0
BOOKS & MULTI-MEDIA	0
FASHION & FOOTWEAR	0
FITNESS & LEISURE	0
FULL SERVICE F&B	12,436
GROCERY, CONVENIENCE & SPECIALTY FOODS	9,366
HEALTH & BEAUTY	715
HOME ELECTRONICS & APPLIANCES	0
HOME FURNISHINGS & DÉCOR	0
HOME IMPROVEMENT & GARDENING	11,038
JEWELRY	0
LIMITED SERVICE F&B	5,682
PERSONAL SERVICE	0
PHARMACY	0
PROFESSIONAL & FINANCIAL SERVICE	5,045
SPECIALTY RETAIL	0
SPORTING GOODS & OUTDOOR RECREATION	1,456
TOYS & HOBBIES	0
VACANT	0
TOTAL	51,929

In the case of Ingonish, if 100% of the trade area spending were captured, approximately 109.153 sf of space would be supported.

This is not realistic based on the resident population base only, but from this figure we can calculate that the current Inverness inventory of 51,929 sf accounts for a market share of inventory of just under 48%, which is more representative of the market, recognizing that residents will likely make semi-frequent journey's to Sydney for retail shops and services, as well as stocking up on grocery and convenience items.

A nominal increase in market share could help support some new retail, but the competitive pull of Sydney as well as Baddeck is as much a consideration as is the low permanent population base. 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". This high level methodology suggests an unmet potential of only 2,647 sf.

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 6-3** recognizes the "current calculated per capita floorspace" of 22.8 and applies a "target per capita" floorspace of 20, which is realistic for the Ingonish resident and tourist market against the population by 2031. This results in a negative amount of space (-4,461 sf), which is simply a stabilization of supportable resident demand.

Visitor-Driven Demand Floorspace Methodology

The third input or consideration is the nature of tourism. As such, and recognizing the economic impact that tourism has for Ingonish, as with Inverness, new floorspace demand attributable to the visitors is estimated to be approximately 17,839 sf by 2031.

Each of these approaches is then averaged so as to create sufficient opportunity to capture visitor spending that isn't fully being capture today, as well as some additional year-round local support with the goal of enabling more year-round vibrancy for existing and new businesses in Ingonish.

Table 6-3. Ingonish Retail Demand Summary

(Source: FBM)

		INGONISH DEMAND ESTIMATE (10-year target to 2031)
Inventory Market Share Methodology	Current inventory (sf)	51,929
	Current market share by inventory	47.6%
	Target potential fair market share	50.0%
		54,576
	Unmet Potential of fair market share(sf)	2,647
Per Capita Floorspace Methodology	Current per capita floorspace est (sf/capita)	22.8
	Target per capita (sf/capita)	20.0
	Target retail based on per capita (sf)	40,000
	Unmet potential of per capita (sf)	-11,929
Visitor-Supported Floorspace Demand Forecast (sf)		17,839
TOTAL Resident + Visitor Floorspace Demand (sf)		2,853

In the case of Ingonish, the inventory market share methodology yields a demand estimate of 2,647 sf, while the per capita floorspace methodology yields a floorspace demand of -11,929 sf and visitor-driven demand at 17,839 sf. As a result, the combined average new floorspace demand in Ingonish by 2031 is estimated at 2,853 sf. This figure is seen to be low, yet a fair and reasonable amount of space to accommodate fresh new retail additions in the Ingonish community by 2031.

The single biggest consideration for Ingonish is in creating the necessary attraction to which the visitors staying in accommodations can visit and spend money.

6.6 Business Market Opportunities

On the basis of the current locations and provision of retail in Ingonish, this amount of retail space, albeit limited should be a consideration as part of a resort village at Cape Smokey’s base where the activity and visibility to passing motorists would be attractive and convenient, as well as central to the majority of the accommodations in the area within a 10-minute drive time.

Even though the demand forecast based on current and near term growth dynamics suggests relatively limited demand, a village type development at Cape Smokey in the range of 15,000 sf would be supported by the visitor volume that has historically not stopped in the area. Furthermore, with the recent gondola opening and adjacent amenity package of alpine and waterfront, Cape Smokey is the single most significant catalyst to attracting and retaining visitor spending that would exceed the conservative forecasts in this study.

Tourism, as opposed to local trade area growth will be the backbone of any successful retail provision in Ingonish.

In addition to retail, and since Ingonish is at the entry to the National Park, it is recommended that either at Cape Smokey or in the core village area, that an EV Charging station be introduced as a further enticement to guests and visitors.

Figure 6-6. Ingonish Retail Inventory Images



7.0 Baddeck Retail Market Assessment

7.1 Introduction

Baddeck is a village of about 800 people in southern Victoria County. Centrally located on Cape Breton Island, the town is nestled on the north shore of the Bras d'Or lake, itself designated a UNESCO Biosphere Reserve since 2011. Baddeck is the boating centre of Bras d'Or Lake with 111 mooring spots, 22 of which are reserved for commercial use like boat tours. Baddeck is home to the Alexander Graham Bell National Historic Site which saw 86,302 visitors in 2018-2019 season. Victoria County Memorial Hospital is also located in Baddeck.

The Village of Baddeck (village commission) is currently in the process of deciding whether to join with the surrounding Victoria County. In November 2021 the council voted to dissolve, but at December special public engagement meeting, the public voted unanimously in favour of maintaining the village commission. Investigations into financial irregularities with the village commission will delay the final dissolution decision.

7.2 Trade Area

The Trade Area for Baddeck is detailed in **Appendix A** and illustrated in **Figure 7-1**. Estimated for the end of year 2021, the Baddeck Trade Area population is 6,265 with 55% falling within the Joyful County lifestyle segment (**Figure 7-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be slightly younger with a lower household income.

Unlike many smaller Nova Scotian communities, which until recently have been facing population decline, the population in the Baddeck Trade Area is anticipated to increase by 2031 to an estimated 7,245 residents.

7.3 Retail 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 2021 year end data.

Figure 7-1. Baddeck Trade Area

(Source: FBM)



Trade Area Resident Household Spending

Each of the major five categories of spending (Convenience, Comparison, Leisure, Auto and Online Sales) was assessed at a detailed category-by-category level then aggregated into major categories as shown in **Figure 7-3** for the Baddeck Trade Area.

The Baddeck Trade Area spending, as illustrated in **Table 7-1** is estimated at \$58 million in 2021 and is forecast to grow to \$68 million by 2026 and \$80 million by 2031. This growth is driven by expected population growth in the area. Spending by the local resident base does however have the choice to travel on a semi-frequent basis to retailers in Port Hawkesbury or Sydney for larger bulk convenience or bigger ticket purchases.

Visitor Spending

Baddeck's natural lakefront amenity is not only a tourist destination for its beauty, but also as the home of the Alexander Graham Bell Museum. Additionally, the "main street" in Baddeck is compact and walkable to both of the above destinations and has a strong mix of local and visitor-oriented shops and services.

While Baddeck does not have as many traditional hotel accommodations, it does have a number of accommodation formats and because of all these factors, Baddeck benefits from significant visitor volume as well as multiple night stays.

With data from the Alexander Graham Bell Museum placing annual visitation at 85,000, for the purposes of this study, we used an estimated annual visitor catchment for Baddeck of 100,000 visitors with a total duration averaging 2 days.

With a very strong roster of shops and restaurants in Baddeck, the retention of visitor spending is likely quite high. Consequently, the resulting estimated visitor spending in Baddeck which supplements the smaller, yet strong local resident trade area, is approximately \$4.0 million per year on local goods and services and recreational amenities in 2021, growing to \$4.8 million in 2026 and \$5.4 million by 2031.

7.4 Retail Inventory

Baddeck has a strong cluster of retail business along Chebucto Street with many seasonal accommodations located a short walking distance away (**Figure 7-4**). Storefronts are positioned near the street creating an enjoyable main street feel for residents and visitors alike. Baddeck also provides a number of day-to-day services through stores like the Co-op, Pharmasave, East Coast Credit Union, and NSLC (**Figure 7-5**). Outside of the local area, there are also some other destinations, which include some roadside glass blowing galleries as well as the increasingly popular Big Spruce Brewing.

Baddeck has a total ground level inventory of 97,072 sf (**Table 7-2**), with near zero vacancy, thus illustrating the strength, resilience and balance of the local inventory. The inventory measured against the local trade area it serves equates to a per capita ratio of 15.4 sf/capita, which is stable, but has room for upward growth given the low vacancy and strong visitation factors.

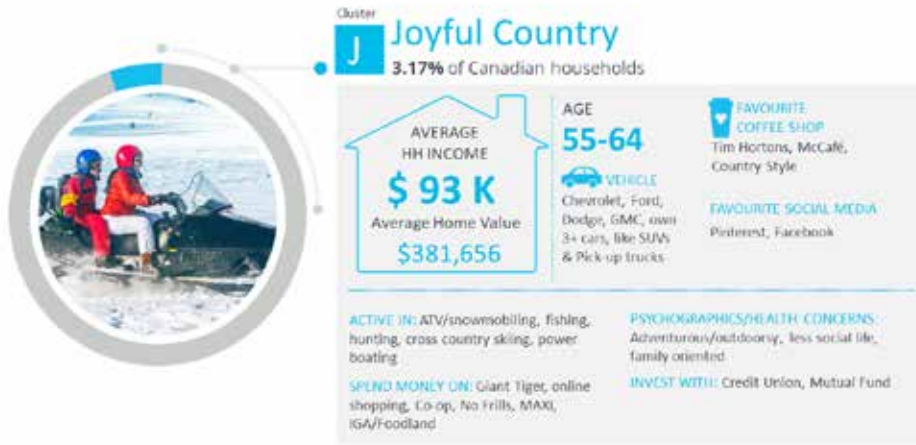
7.5 Retail Demand

Quantifying the future potential retail demand for Baddeck utilized a more general methodology. Rather than examining the market capture by retail spending, the methodology took 3 approaches and then created an average of the three to determine the approximate demand. Additionally, the demand for this community looks toward a 10-year horizon to the year 2031. **Appendix B & C** provides documentation of detailed category spending for the Baddeck Trade Area.

Inventory Market Share Methodology

The first methodology, as shown in **Table 7-3** 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.

Figure 7-2. Dominant Lifestyle Cluster in Baddeck Trade Area



In the case of Baddeck, if 100% of the trade area spending were captured, approximately 260,372 sf of space would be supported.

This is not realistic based on the resident population base only, but from this figure we can calculate that the current Inverness inventory of 97,072 sf accounts for a market share of inventory of just under 38%, which is more representative of the market, recognizing that residents will likely make semi-frequent journey's to Port Hawkesbury or Sydney for retail shops and services, as well as stocking up on grocery and convenience items.

A nominal increase in market share to 40% could help support some new retail, without hindering existing businesses. 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". This high level methodology suggests an unmet potential of 7,077 sf.

Figure 7-3. Baddeck Trade Area Retail Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)

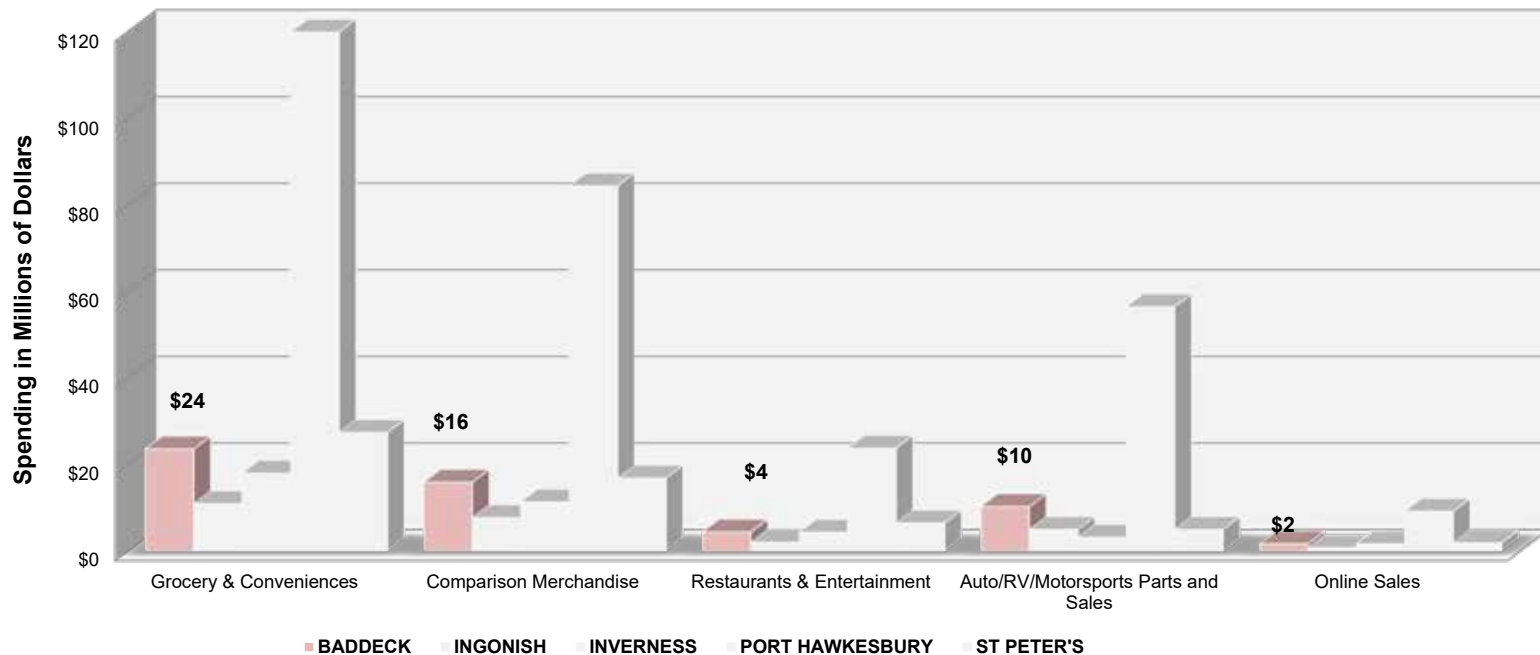


Table 7-1. Baddeck Trade Area Resident AND Visitor Retail Household Spending Summary 2021 Y/E estimate

(Source: FBM)

Retail Spending by Merchandise Category		BADDECK PRIMARY TRADE AREA + VISITOR SPENDING								
		2021			2026			2031		
		BADDECK VISITOR Aggregate Retail Spending	BADDECK TRADE AREA Aggregate Retail Spending	BADDECK TOTAL Visitor + Resident Spending	BADDECK VISITOR Aggregate Retail Spending	BADDECK TRADE AREA Aggregate Retail Spending	BADDECK TOTAL Visitor + Resident Spending	BADDECK VISITOR Aggregate Retail Spending	BADDECK TRADE AREA Aggregate Retail Spending	BADDECK TOTAL Visitor + Resident Spending
Conveniences	Grocery & Convenience	\$200,000	\$15,149,642	\$15,349,642	\$240,378	\$17,634,293	\$17,874,671	\$272,165	\$20,860,481	\$21,132,646
	Pharmacy	\$40,000	\$1,803,325	\$1,843,325	\$48,076	\$2,099,084	\$2,147,159	\$54,433	\$2,483,110	\$2,537,543
	Alcohol & Tobacco (Incl Cannabis)	\$120,000	\$2,671,082	\$2,791,082	\$144,227	\$3,109,159	\$3,253,386	\$163,299	\$3,677,978	\$3,841,277
	Personal Services	\$0	\$4,038,460	\$4,038,460	\$0	\$4,700,796	\$4,700,796	\$0	\$5,560,806	\$5,560,806
	Fashion & Accessories	\$240,000	\$2,704,946	\$2,944,946	\$288,454	\$3,148,577	\$3,437,031	\$326,598	\$3,724,608	\$4,051,206
Comparison	Jewelry	\$40,000	\$198,474	\$238,474	\$48,076	\$231,025	\$279,101	\$54,433	\$273,292	\$327,725
	Health & Beauty	\$0	\$1,046,188	\$1,046,188	\$0	\$1,217,771	\$1,217,771	\$0	\$1,440,561	\$1,440,561
	Home Furniture & Décor	\$40,000	\$1,310,753	\$1,350,753	\$48,076	\$1,525,726	\$1,573,802	\$54,433	\$1,804,857	\$1,859,290
	Appliances & Electronics	\$0	\$2,180,983	\$2,180,983	\$0	\$2,538,680	\$2,538,680	\$0	\$3,003,131	\$3,003,131
	Home Improvement & Gardening	\$0	\$5,384,005	\$5,384,005	\$0	\$6,267,020	\$6,267,020	\$0	\$7,413,570	\$7,413,570
	Books & Media	\$40,000	\$608,338	\$648,338	\$48,076	\$708,110	\$756,186	\$54,433	\$837,659	\$892,092
	Sporting Goods	\$0	\$393,544	\$393,544	\$0	\$458,089	\$458,089	\$0	\$541,896	\$541,896
	Toys & Hobbies	\$80,000	\$462,980	\$542,980	\$96,151	\$538,912	\$635,063	\$108,866	\$637,505	\$746,371
	Specialty Retail	\$200,000	\$1,695,120	\$1,895,120	\$240,378	\$1,973,132	\$2,213,510	\$272,165	\$2,334,116	\$2,606,281
	Quick Service F&B	\$560,000	\$1,210,103	\$1,770,103	\$673,059	\$1,408,569	\$2,081,628	\$762,062	\$1,666,266	\$2,428,328
Leisure	Restaurants & Pubs	\$1,200,000	\$2,662,471	\$3,862,471	\$1,442,270	\$3,099,136	\$4,541,406	\$1,632,990	\$3,666,122	\$5,299,112
	Arts & Entertainment	\$360,000	\$145,875	\$505,875	\$432,681	\$169,800	\$602,481	\$489,897	\$200,865	\$690,762
	Fitness & Leisure	\$40,000	\$447,694	\$487,694	\$48,076	\$521,120	\$569,195	\$54,433	\$616,458	\$670,891
Auto	Auto Parts & Accessories and Fuel	\$840,000	\$4,114,770	\$4,954,770	\$1,009,589	\$4,789,623	\$5,799,212	\$1,143,093	\$5,665,883	\$6,808,976
	Auto/RV/Motorsports Dealership	\$0	\$6,244,969	\$6,244,969	\$0	\$7,269,189	\$7,269,189	\$0	\$8,599,085	\$8,599,085
TOTAL CATEGORIES		\$4,000,000	\$54,473,723	\$58,473,723	\$4,807,567	\$63,407,808	\$68,215,374	\$5,443,302	\$75,008,248	\$80,451,550
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)		\$3,160,000	\$44,113,983	\$47,273,983	\$3,797,978	\$51,348,996	\$55,146,974	\$4,300,208	\$60,743,280	\$65,043,488
TOTAL Online Sales			\$1,754,060							

Figure 7-4. Baddeck Business Inventory Map (February 2022)



Table 7-2. Baddeck Retail Inventory Summary

STREETFRONT RETAIL & SERVICES BUSINESS MIX	GROUND LEVEL STREETFRONT INVENTORY SQ. FT.
BUSINESS MIX	0
ARTS & ENTERTAINMENT	0
AUTO PARTS & ACCESSORIES	0
AUTO/RV/MOTORSPORTS DEALERSHIP	0
BOOKS & MULTI-MEDIA	0
FASHION & FOOTWEAR	1,100
FITNESS & LEISURE	0
FULL SERVICE F&B	14,929
GROCERY, CONVENIENCE & SPECIALTY FOODS	15,430
HEALTH & BEAUTY	0
HOME ELECTRONICS & APPLIANCES	0
HOME FURNISHINGS & DÉCOR	1,748
HOME IMPROVEMENT & GARDENING	15,500
JEWELRY	0
LIMITED SERVICE F&B	10,115
PERSONAL SERVICE	5,441
PHARMACY	4,000
PROFESSIONAL & FINANCIAL SERVICE	8,158
SPECIALTY RETAIL	17,151
SPORTING GOODS & OUTDOOR RECREATION	3,500
TOYS & HOBBIES	0
VACANT	0
TOTAL	97,072

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 7-3** recognizes the “current calculated per capita floorspace” of 15.4 and applies a “target per capita” floorspace of 20, which is realistic for the growing Baddeck resident and tourist market against the population by 2031.

This results in future demand for 47,928 sf, which could be challenging, but would in all likelihood be incrementally added over time.

Visitor-Driven Demand Floorspace Methodology

The third input or consideration is the nature of tourism. As such, and recognizing the economic impact that tourism has for Baddeck, demand attributable to the visitors is estimated to be approximately 24,042 sf by 2031.

Each of these approaches is then averaged so as to create sufficient opportunity to further entrench the area as a visitor destination, while balancing this with the necessary year-round resident support.

In the case of Baddeck, the inventory market share methodology yields a demand estimate of 7,077 sf, while the per capita floorspace methodology yields a floorspace demand of 47,928 sf and visitor-driven demand at 24,042 sf. As a result, the combined average new floorspace demand in Baddeck by 2031 is estimated at 26,264 sf. This figure is seen to be a fair and reasonable amount of space to accommodate fresh new retail additions in Baddeck by 2031, particularly as the area is expected to grow with more permanent full-time residents.

Table 7-3. Baddeck Retail Demand Methodology

(Source: FBM)

		BADDECK DEMAND ESTIMATES (10-year target to 2031)
Inventory Market Share Methodology	Current inventory (sf)	97,072
	Current market share by inventory	37.3%
	Target potential fair market share	40.0%
	Unmet Potential of fair market share(sf)	7,077
	Visitor-Supported Floorspace Demand Forecast (sf)	
Per Capita Floorspace Methodology	Current per capita floorspace est (sf/capita)	15.4
	Target per capita (sf/capita)	20.0
	Target retail based on per capita (sf)	145,000
	Unmet potential of per capita (sf)	47,928
TOTAL Resident + Visitor Floorspace Demand (sf)		26,264

7.6 Business Market Opportunities

Baddeck benefits from having a compact collection of shops and services closely walkable to the water’s edge as well as being a major tourist destination. While there are not a lot of major infill redevelopment opportunities along the main street, the waterfront along Water Street presents a distinct opportunity to create a boardwalk type atmosphere comprising a mix of specialty shops and casual dining restaurant, still within a convenient and comfortable walk of main street. Signage from the core main street to Water Street and waterfront should be more prominent as part of any future additional commercial components.

Baddeck is somewhat unique in that two of its most prominent businesses are a home decor store in a heritage building and an outdoor apparel store. These stores are strong in their place and could be supported by non-competing, but complementary store types, such as women’s apparel or fashion accessories, or nautical-specific apparel.

Since there is also an active environment of local farming in the area, one option may be to create a seasonally-adaptive, quasi-enclosed space on the waterfront for a public market/farmer’s market, similar to the example of the Hubbards Barn in Hubbards, NS. This type of facility could become a local and regional destination as well as serve as an ideal rental facility for community and/or private events such as weddings.

Because of the growing, more permanent residential segment that exists today and is forecast to grow, there may also be an opportunity for another financial institution, such as TD or Scotiabank.

Lastly, leverage the proximity of the Wagmatcook First Nation to invite them to establish an interactive cultural workshop space in the village or as part of any new community space.

Figure 7-5. Baddeck Retail Inventory Images (February 2022)



8.0 Key Findings Summary

8.1 Retail Market Analysis Key Findings

Port Hawkesbury

From a marketing attraction perspective, the demand forecasts for Port Hawkesbury provide insights into the target types, formats and merchandise or brand categories that could or should be pursued to further solidify its place in the market as a regional destination for core goods and services.

The amount of future demand forecast in Port Hawkesbury presents immediate opportunities for action as well as planning for future infill and redevelopment.

Near term considerations should be engaging in discussions with RBC to find out their plans for possible relocation in the community along Reeves Street. With the recent completion of a new TD Bank and realizing that there are vacant lots across from the Causeway Shopping Centre, it would be in RBC's best interest to pursue relocating where they can cluster around like businesses and benefit from high visibility and access to the regional segment.

Unlike other smaller markets in Cape Breton Island, Port Hawkesbury has the opportunity to attract more branded or franchise model retailers in the community, either along Reeves Street or within available vacant spaces in the Port Hawkesbury Shopping Centre.

It is also worth observing that since enclosed mall shopping patterns have declined, the requisite amount of surface parking is no longer needed and therefore, the Port Hawkesbury Shopping Centre could benefit from creating pad site drive through or a smaller multi-tenant building with exposure to the highway. This could be a development in the range of 10,000 to 20,000 sf.

In examining the current business mix and spending patterns, as well as the forecasted demand estimates at over 60,000 sf, the following branded or franchise chains could be pursued for Port Hawkesbury as they are deemed compatible with the demographic composition, spending patterns and would be able to be competitive in the identified trade area:

Limited/Quick Service Food & Beverage:

Burger King (3,000 to 4,000 sf) with drive thru
Mary Brown's (1,500 to 2,000 sf) with drive thru
Popeye's Louisiana Chicken (2,500 - 3,000 sf) with drive thru
Chopped Leaf (1,000 to 1,250 sf)

Full Service Restaurants:

Cora's (1,500 to 2,500 sf)
Montana's Bar & Grill (5,000 to 7,000 sf)
Boston Pizza (5,000 to 7,000 sf)
IHOP (4,000 to 6,000 sf)

Grocery & Convenience:

Bulk Barn (5,000 sf)
Supplement King (1,000 sf)
Cobs Bread (800 - 1,200 sf)

General Merchandise

Value Village (25,000 to 35,000 sf)
Dollar Tree (8,000 to 15,000 sf)
Great Canadian Dollar Store (5,000 sf)

Clothing & Fashion

Wearhouse One (2,000 to 3,000 sf)

Sporting Goods & Leisure

Cleve's Source For Sports (4,000 to 7,000 sf)
Sport Chek (10,000 to 15,000 sf)
Fit 4 Less (5,000 sf)
Goodlife Fitness (10,000 sf)

Pharmacy & Personal Services

Great Clips (800 to 1,000 sf)
Sport Clips (800 to 1,200 sf)
Lawton's (7,500 to 12,000 sf)

St. Peter's

Demand forecasts for St. Peter's provide insights into the target types, formats and merchandise store types that could or should be pursued to further solidify its place in the market as a regional destination for core goods and services.

When looking at the future conservative demand estimates at 4,100 sf, it is reasonable to see that this amount of ground-oriented, street fronting retail could reasonably be accommodated in a range of owner-occupied or multi-tenant buildings with spaces ranging from 500 sf to 1,500 sf.

In addition to new demand, which could be ideally accommodated on the available infill properties along Grenville Street, the vacant former NSLC Building should be actively pursued for adaptive re-use as a craft brewery/distillery restaurant with an outdoor seating area fronting the main street with exposure to Memorial Park. Even in the interim, the space should be adaptively used as a local indoor weekend market space for home-based businesses to use or as a vendor cooperative to support local food producers, crafters and artisans. This could involve welcoming the Potlotek First Nation to establish an interactive cultural workshop space, perhaps as part of the adaptive re-use or temporary use of the former NSLC Building.

Because St. Peter's is however along a well-traveled vehicle and transport corridor, there is the potential to have interest for another branded quick serve food & beverage operator, like an A&W, most likely at the north end of town near the canal.

Inverness

Inverness should look to a market like Tofino on Vancouver Island as a comparable destination that has embraced the storm-watching season to effectively round out its seasonality, while also becoming a mecca for outdoor pursuits and a refined, locally-sourced and upscale food & beverage culture, while simultaneously embracing the local residents.

With forecasts for conservatively 8,000 to 10,000 sf of new retail floorspace this demand could be divided into units of 1,000 to 3,000 sf which would provide for strategic well-placed merchandise store types. Inverness has the opportunity to become a recreational outfitter destination featuring bike, golf, ski and kayak rentals or instruction. Additionally, the visitor profile would suggest that an upscale "foodie hub" comprised of finer dining would be met with success, as would more upscale cafe bistro concepts. Much like Cheticamp has L'abri cafe, Inverness could notch up the caliber of dining.

Other category opportunities that may have smaller space requirements could include a domestic retailer like Peace by Chocolate may be enticed to set up a seasonal pop-up in the village.

In addition to retail, and as an environmentally prestigious and promoted region, EV Charging stations should be introduced as a further enticement to attract and retain guests and visitors.

Ingonish

On the basis of the current locations and provision of retail in Ingonish, this amount of retail space, albeit limited should be a consideration as part of a resort village at Cape Smokey's base where the activity and visibility to passing motorists would be attractive and convenient, as well as central to the majority of the accommodations in the area within a 10-minute drive time.

Even though the demand forecast based on current and near term growth dynamics suggests relatively limited demand, a village type development at Cape Smokey in the range of 15,000 sf would be supported by the visitor volume that has historically not stopped in the area. Furthermore, with the recent gondola opening and adjacent amenity package of alpine and waterfront, Cape Smokey is the single most significant catalyst to attracting and retaining visitor spending that would exceed the conservative forecasts in this study.

Tourism, as opposed to local trade area growth will be the backbone of any successful retail provision in Ingonish.

In addition to retail, and since Ingonish is at the entry to the National Park, it is recommended that either at Cape Smokey or in the core village area, that an EV Charging station be introduced as a further enticement to guests and visitors.

Baddeck

Baddeck benefits from having a compact collection of shops and services closely walkable to the water's edge as well as being a major tourist destination. While there are not a lot of major infill redevelopment opportunities along the main street, the waterfront along Water Street presents a distinct opportunity to create a boardwalk type atmosphere comprising a mix of specialty shops and casual dining restaurant, still within a convenient and comfortable walk of main street. Signage from the core main street to Water Street and waterfront should be more prominent as part of any future additional commercial components.

Baddeck is somewhat unique in that two of its most prominent businesses are a home decor store in a heritage building and an outdoor apparel store. These stores are strong in their place and could be supported by non-competing, but complementary store types, such as women's apparel or fashion accessories, or nautical-specific apparel.

Since there is also an active environment of local farming in the area, one option may be to create a seasonally-adaptive, quasi-enclosed space on the waterfront for a public market/farmer's market, similar to the example of the Hubbards Barn in Hubbards, NS. This type of facility could become a local and regional destination as well as serve as an ideal rental facility for community and/or private events such as weddings.

Because of the growing, more permanent residential segment that exists today, there may also be an opportunity for another financial institution, such as TD or Scotiabank.

Lastly, leverage the proximity of the Wagmatcook First Nation to invite them to establish an interactive cultural workshop space in the village or as part of any new community space.

8.2 Overall Positioning Strategy

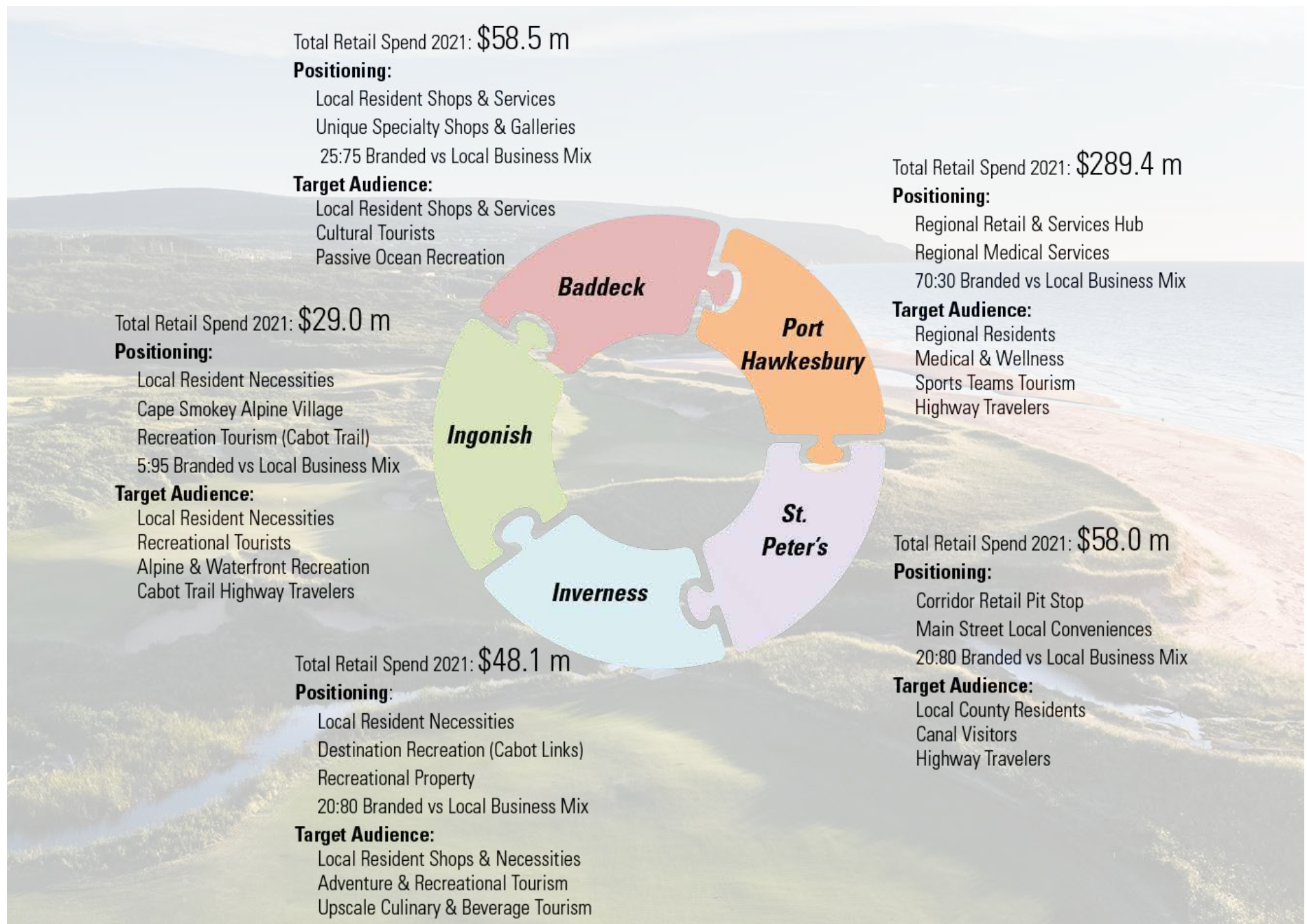
To visually portray the previously articulated summaries for each respective community, the diagram presented in **Figure 8-1** shows how each of the communities can play its part as an overall puzzle piece. In this regard, each community can have a unique positioning strategy that works to create individual appeal for the Cape Breton region as part of an overall regional resident and visitor consumer "trail".

Each community has established and emerging strengths that can be captured by a corresponding merchandise and store type mix to garner stronger resident spending retention as well as greater visitor spending attraction.

Throughout Cape Breton Island, there are a number of strategies underway ranging from high speed Internet to streetscaping and destination tourism all of which have their place in pushing the boundaries for where the future can be.

With recent StatsCan census results revealing a noticeable positive direction in population forecasts across Nova Scotia including many Cape Breton communities, full-time resident and changing demographic profiles are setting the stage for resurgent retail activity across the island. Signs of positive population growth due to affordable quality of life, and aggressive immigration and retention efforts by the province of Nova Scotia and Cape Breton Island are already being seen and felt in communities like Baddeck, Inverness, Port Hawkesbury and St. Peter's, where declining population rates are no longer the case.

Figure 8-1. Retail Positioning Strategy & Target Markets Summary



APPENDIX
Retail Market Analysis
Cape Breton Regional
Enterprise Network & Cape
Breton Partnership

April 2022

Appendix A: Detailed Trade Area Demographics

(Source: Manifold Data Mining Inc. and FBM, 2021/2022)

Attribute	Baddeck Trade Area			Ingonish Trade Area			Inverness Trade Area			Port Hawkesbury Trade Area			St. Peter's Trade Area		
	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
SUMMARY															
Total population	6,265			2,279			3,485			24,150			5,379		
Total population age 15 and over	5,175			1,942			3,011			20,977			4,800		
Total number of private households	2,316			1,049			1,677			10,610			2,536		
Average number of persons in private households	2.54		117	2.11		97	2.05		94	2.23		103	2.00		92
Total population in private households	5,872			2,210			3,444			23,703			5,066		
Total number of census families in private households	1,564			670			1,021			7,377			1,659		
Average number of persons per census family	3.17		118	2.77		103	2.61		97	2.68		100	2.52		94
Total population in families	4,953			1,860			2,666			19,752			4,184		
Total number of labour force age 15 and over	2,656			1,112			1,602			11,256			2,166		
Land area (square km)	570.09			323.09			589.00			4,457.86			786.27		
Inhabited area (square km)	1,640.81			987.82			560.69			3,131.58			773.77		
POPULATION AGE															
Population age 0-14	1,090	17.4%	124	336	14.8%	105	474	13.6%	97	3,173	13.1%	94	579	10.8%	77
Population age 15-24	836	13.4%	119	264	11.6%	103	378	10.8%	97	3,141	13.0%	116	588	10.9%	98
Population age 25-34	609	9.7%	78	192	8.5%	67	312	9.0%	72	2,243	9.3%	74	468	8.7%	69
Population age 35-44	628	10.0%	85	234	10.3%	87	326	9.4%	79	2,253	9.3%	79	457	8.5%	72
Population age 45-54	659	10.5%	84	272	11.9%	95	339	9.7%	77	2,969	12.3%	98	642	11.9%	95
Population age 55-64	925	14.8%	94	402	17.7%	113	542	15.6%	99	3,804	15.8%	101	843	15.7%	100
Population age 65+	1,518	24.2%	109	578	25.4%	114	1,114	32.0%	144	6,567	27.2%	123	1,800	33.5%	151
DWELLING															
Total number of occupied private dwellings	2,316			1,049			1,677			10,610			2,536		
Average dwelling value \$	\$280,136		92	\$299,758		99	\$228,354		75	\$224,316		74	\$237,515		78
Home owners	1,637	70.7%	104	915	87.2%	128	1,428	85.1%	125	8,579	80.9%	118	2,023	79.8%	117
Home tenants	289	12.5%	40	134	12.8%	41	250	14.9%	48	1,674	15.8%	51	389	15.4%	49
Band housing	390	16.8%	2,903	0	0.0%	0	0	0.0%	0	358	3.4%	581	124	4.9%	841
HOUSEHOLDS															
One-family households	1,455	62.8%	97	706	67.3%	104	1,015	60.5%	93	6,882	64.9%	100	1,651	65.1%	101
Multiple-family households	46	2.0%	152	21	2.0%	155	28	1.7%	127	207	2.0%	149	43	1.7%	129
Non-family households	729	31.5%	93	278	26.5%	78	593	35.3%	104	3,133	29.5%	87	765	30.2%	89
EDUCATION															
Total population aged 15 years and over by highest certificate, diploma, or degree	5,175			1,942			3,011			20,977			4,800		
No certificate, diploma, or degree	1,107	21.4%	110	660	34.0%	174	592	19.7%	101	4,679	22.3%	114	1,263	26.3%	135
High school diploma or equivalent	1,311	25.3%	99	556	28.6%	112	568	18.9%	74	4,554	21.7%	85	979	20.4%	80
Post-secondary certificate, diploma, or degree	2,756	53.3%	97	727	37.4%	68	1,851	61.5%	112	11,745	56.0%	102	2,557	53.3%	97
Apprenticeship or trades certificate or diploma	719	13.9%	143	248	12.8%	131	552	18.3%	189	3,280	15.6%	161	706	14.7%	151
College, CEGEP or other non-university certificate or diploma	979	18.9%	88	261	13.4%	63	781	25.9%	121	5,126	24.4%	114	1,128	23.5%	110
University certificate or diploma below bachelor level	162	3.1%	128	38	2.0%	79	76	2.5%	103	611	2.9%	118	127	2.7%	108
University certificate, diploma, or degree at bachelor level or above	896	17.3%	81	180	9.3%	43	442	14.7%	69	2,728	13.0%	61	596	12.4%	58
Bachelor's degree	599	11.6%	81	111	5.7%	40	296	9.8%	69	1,761	8.4%	59	345	7.2%	50

Attribute	Baddeck Trade Area			Ingonish Trade Area			Inverness Trade Area			Port Hawkesbury Trade Area			St. Peter's Trade Area			
	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index	
INCOME																
Average family income \$	\$93,005		85	\$86,510		79	\$107,366		98	\$100,987		92	\$91,863		84	
Average household income \$	\$75,079		85	\$73,473		83	\$83,860		94	\$83,370		94	\$79,106		89	
Average income population age 15 and over (\$)	\$41,947		87	\$40,789		85	\$45,923		95	\$44,695		93	\$43,673		91	
Population with income Under \$10,000 (including loss)	751	14.5%	133	170	8.8%	80	294	9.8%	89	2,531	12.1%	110	510	10.6%	97	
Population with income \$10,000 to \$19,999	922	17.8%	110	298	15.3%	95	593	19.7%	122	3,842	18.3%	113	916	19.1%	118	
Population with income \$20,000 to \$29,999	833	16.1%	107	413	21.3%	141	549	18.2%	121	3,399	16.2%	107	822	17.1%	114	
Population with income \$30,000 to \$39,999	764	14.8%	114	373	19.2%	148	447	14.9%	115	2,851	13.6%	105	666	13.9%	107	
Population with income \$40,000 to \$49,999	555	10.7%	102	223	11.5%	109	322	10.7%	101	2,171	10.4%	98	487	10.1%	96	
Population with income \$50,000 to \$59,999	358	6.9%	88	131	6.7%	85	228	7.6%	96	1,534	7.3%	93	336	7.0%	89	
Population with income \$60,000 to \$69,999	216	4.2%	72	94	4.9%	83	125	4.2%	71	1,016	4.8%	83	243	5.1%	87	
Population with income \$70,000 to \$79,999	152	2.9%	64	65	3.3%	73	114	3.8%	83	820	3.9%	86	189	3.9%	86	
Population with income \$80,000 to \$89,999	119	2.3%	63	33	1.7%	47	76	2.5%	70	615	2.9%	81	145	3.0%	83	
Population with income \$90,000 to \$99,999	85	1.6%	65	16	0.8%	33	52	1.7%	68	397	1.9%	75	89	1.9%	73	
Population with income \$100,000 and over	207	4.0%	69	46	2.4%	41	124	4.1%	71	963	4.6%	79	207	4.3%	74	
Population with income \$100,000 to \$149,999	130	2.5%	78	28	1.4%	44	81	2.7%	83	606	2.9%	89	101	2.1%	65	
Population with income \$150,000 and over	77	1.5%	58	18	0.9%	36	43	1.4%	55	358	1.7%	66	106	2.2%	85	
PROJECTIONS																
Annual population growth in the period: Next 3 years			0.8%			-0.9%			-0.7%			-0.1%			-0.7%	
Annual household growth in the period: Next 3 years			1.3%	126		-0.4%	-44		-0.1%	-13		0.4%	40		-0.3%	-26
Annual family growth in the period: Next 3 years			1.0%			-1.3%			-0.3%			0.2%			-0.7%	
Annual population growth in the period: Next 5 years			1.3%	382		-1.3%	-394		-1.1%	-318		-0.1%	-33		-1.0%	-312
Annual household growth in the period: Next 5 years			2.0%	226		-0.6%	-63		-0.1%	-11		0.7%	79		-0.3%	-33
Annual family growth in the period: Next 5 years			1.6%	431		-1.9%	-531		-0.4%	-114		0.3%	89		-1.0%	-272
Annual population growth in the period: 5 to 10 years from current year			1.5%	484		-1.5%	-497		-1.3%	-403		-0.1%	-39		-1.1%	-355
Annual household growth in the period: 5 to 10 years from current year			2.3%	276		-0.8%	-99		-0.3%	-38		0.7%	80		-0.4%	-48
Annual family growth in the period: 5 to 10 years from current year			1.9%	571		-2.1%	-612		-0.5%	-150		0.4%	112		-1.0%	-303
POPULATION GROWTH																
Current year total population	6,265			2,279			3,485			24,150			5,379			
3-Year Projections - Total population	6,541		1.45%	2,177		-1.51%	3,359		-1.22%	24,051		-0.14%	5,187		-1.20%	
5-Year Projections - Total population	6,698		1.35%	2,134		-1.31%	3,306		-1.05%	24,065		-0.07%	5,109		-1.02%	
10-Year Projections - Total population	7,254		1.61%	1,975		-1.54%	3,105		-1.25%	23,988		-0.06%	4,837		-1.09%	
HOUSEHOLD GROWTH																
Current year total number of households	2,316			1,049			1,677			10,610			2,536			
3-Year Projections - Total number of households	2,471			1,026			1,666			10,835			2,504			
5-Year Projections - Total number of households	2,565			1,021			1,669			11,001			2,500			
10-Year Projections - Total number of households	2,887			980			1,644			11,399			2,453			
FAMILY GROWTH																
Current year total number of census families	1,564			670			1,021			7,377			1,659			
3-Year Projections - Total number of census families	1,651			627			1,005			7,456			1,602			
5-Year Projections - Total number of census families	1,701			609			1,000			7,516			1,580			
10-Year Projections - Total number of census families	1,887			548			975			7,684			1,500			
HOUSEHOLD INCOME GROWTH																
Current year average household income	\$75,079		85	\$73,473		83	\$83,860		94	\$83,370		94	\$79,106		89	
3-Year Projections - Average household income	\$79,960		84	\$79,742		84	\$91,992		97	\$89,592		95	\$82,643		87	
5-Year Projections - Average household income	\$86,481		84	\$89,479		87	\$104,117		101	\$98,698		96	\$87,955		85	
10-Year Projections - Average household income	\$105,109		86	\$110,008		90	\$131,633		107	\$119,623		97	\$98,717		80	
POPULATION GROWTH ALTERNATE FORECASTS																
Current year total population	6,265			2,279			3,485			24,150			5,379			
3-Year Projections - Total population (modified projection estimates)	6,541		1.45%	2,177		-1.51%	3,381		-1.00%	24,332		0.25%	5,219		-1.00%	
5-Year Projections - Total population (modified projection estimates)	6,698		1.35%	2,134		-1.31%	3,399		-0.50%	24,760		0.50%	5,246		-0.50%	
10-Year Projections - Total population (modified projection estimates)	7,254		1.61%	1,975		-1.54%	3,485		0.50%	25,385		0.50%	5,378		0.50%	

Appendix B: Detailed Resident Trade Area Spending

Port Hawkesbury, St. Peter's, Inverness, Ingonish & Baddeck 2021

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category	2021		2021		2021		2021		2021	
	BADDECK TRADE AREA Per Household Retail Spending	BADDECK TRADE AREA Aggregate Retail Spending	INGONISH TRADE AREA Per Household Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INVERNESS TRADE AREA Household Retail Spending	INVERNESS TRADE AREA Aggregate Retail Spending	PORT HAWKESBURY TRADE AREA ANNUAL Household Retail Spending	PORT HAWKESBURY TRADE AREA ANNUAL Aggregate Retail Spending	ST. PETER'S TRADE AREA ANNUAL Household Retail Spending	ST PETER'S TRADE AREA ANNUAL Aggregate Retail Spending
Grocery & Convenience	\$6,541	\$15,149,642	\$6,719	\$7,047,853	\$6,943	\$11,643,824	\$7,462	\$79,169,528	\$7,051	\$17,881,653
Pharmacy	\$779	\$1,803,325	\$759	\$796,651	\$802	\$1,344,351	\$855	\$9,076,591	\$848	\$2,150,127
Alcohol & Tobacco	\$1,153	\$2,671,082	\$1,261	\$1,322,419	\$1,237	\$2,074,806	\$1,358	\$14,410,428	\$1,230	\$3,118,279
Personal Services	\$1,744	\$4,038,460	\$1,769	\$1,855,410	\$1,780	\$2,984,691	\$1,975	\$20,950,756	\$1,705	\$4,325,014
Fashion & Accessories	\$1,168	\$2,704,946	\$1,229	\$1,289,134	\$367	\$615,424	\$1,372	\$14,559,344	\$362	\$918,710
Jewelry	\$86	\$198,474	\$86	\$89,721	\$1,212	\$2,032,273	\$97	\$1,031,256	\$1,153	\$2,923,376
Health & Beauty	\$452	\$1,046,188	\$446	\$467,817	\$85	\$142,324	\$510	\$5,408,745	\$84	\$212,158
Home Furniture & Décor	\$566	\$1,310,753	\$587	\$615,668	\$449	\$752,837	\$659	\$6,992,769	\$452	\$1,145,164
Appliances & Electronics	\$942	\$2,180,983	\$1,001	\$1,049,764	\$603	\$1,010,791	\$1,101	\$11,679,681	\$569	\$1,442,118
Home Improvement & Gardening	\$2,325	\$5,384,005	\$2,548	\$2,673,007	\$970	\$1,627,274	\$2,559	\$27,150,837	\$981	\$2,488,428
Books & Media	\$263	\$608,338	\$290	\$303,840	\$2,338	\$3,920,199	\$333	\$3,535,067	\$2,452	\$6,217,051
Sporting Goods	\$170	\$393,544	\$184	\$192,566	\$401	\$673,093	\$189	\$2,010,268	\$245	\$620,959
Toys & Hobbies	\$200	\$462,980	\$225	\$236,323	\$162	\$272,294	\$244	\$2,587,031	\$160	\$405,326
Specialty Retail	\$732	\$1,695,120	\$827	\$867,699	\$222	\$371,909	\$892	\$9,465,987	\$223	\$566,409
Quick Service F&B	\$522	\$1,210,103	\$566	\$594,084	\$864	\$1,449,508	\$628	\$6,658,072	\$792	\$2,008,305
Restaurants & Pubs	\$1,150	\$2,662,471	\$1,125	\$1,179,948	\$561	\$941,478	\$1,303	\$13,824,395	\$563	\$1,427,212
Arts & Entertainment	\$63	\$145,875	\$63	\$66,405	\$1,140	\$1,911,733	\$75	\$796,721	\$1,160	\$2,942,508
Fitness & Leisure	\$193	\$447,694	\$226	\$236,877	\$65	\$108,536	\$243	\$2,574,453	\$69	\$175,154
Auto Parts & Accessories	\$1,777	\$4,114,770	\$1,784	\$1,871,226	\$210	\$351,722	\$1,946	\$20,641,958	\$206	\$522,507
Auto/RV/Motorsports Dealership	\$2,696	\$6,244,969	\$3,049	\$3,198,614	\$1,722	\$2,887,130	\$3,382	\$35,877,991	\$1,781	\$4,515,874
TOTAL CATEGORIES	\$23,521	\$54,473,723	\$24,743	\$25,955,027	\$22,132	\$37,116,195	\$27,182.1	\$288,401,878	\$22,084.5	\$56,006,332
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$19,047	\$44,113,983	\$19,910	\$20,885,187	\$20,201	\$33,877,343	\$21,855.0	\$231,881,929	\$20,097.8	\$50,967,951
TOTAL Online Sales	\$757	\$1,754,060	\$797	\$836,120	\$1,026	\$1,720,535	\$874	\$9,272,970	\$777	\$1,971,314

Port Hawkesbury, St. Peter's, Inverness, Ingonish & Baddeck 2026

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category	2026		2026		2026		2026		2026	
	BADDECK TRADE AREA Per Household Retail Spending	BADDECK TRADE AREA Aggregate Retail Spending	INGONISH TRADE AREA Per Household Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INVERNESS TRADE AREA Household Retail Spending	INVERNESS TRADE AREA Aggregate Retail Spending	PORT HAWKESBURY TRADE AREA ANNUAL Household Retail Spending	PORT HAWKESBURY TRADE AREA ANNUAL Aggregate Retail Spending	ST. PETER'S TRADE AREA ANNUAL Household Retail Spending	ST PETER'S TRADE AREA ANNUAL Aggregate Retail Spending
Grocery & Convenience	\$6,875	\$17,634,293	\$7,061	\$7,209,647	\$7,297	\$12,179,396	\$7,842.4	\$86,274,352	\$7,410.8	\$18,527,008
Pharmacy	\$818	\$2,099,084	\$798	\$814,939	\$843	\$1,406,186	\$899.1	\$9,891,141	\$891.1	\$2,227,726
Alcohol & Tobacco	\$1,212	\$3,109,159	\$1,325	\$1,352,777	\$1,300	\$2,170,239	\$1,427.5	\$15,703,647	\$1,292.3	\$3,230,819
Personal Services	\$1,833	\$4,700,796	\$1,859	\$1,898,004	\$1,871	\$3,121,976	\$2,075.3	\$22,830,917	\$1,792.4	\$4,481,105
Fashion & Accessories	\$1,228	\$3,148,577	\$1,292	\$1,318,728	\$386	\$643,731	\$1,442.2	\$15,865,927	\$380.7	\$951,866
Jewelry	\$90	\$231,025	\$90	\$91,781	\$1,274	\$2,125,749	\$102.2	\$1,123,803	\$1,211.6	\$3,028,882
Health & Beauty	\$475	\$1,217,771	\$469	\$478,557	\$89	\$148,871	\$535.8	\$5,894,136	\$87.9	\$219,815
Home Furniture & Décor	\$595	\$1,525,726	\$617	\$629,802	\$472	\$787,465	\$692.7	\$7,620,313	\$474.6	\$1,186,493
Appliances & Electronics	\$990	\$2,538,680	\$1,052	\$1,073,863	\$633	\$1,057,284	\$1,157.0	\$12,727,838	\$597.7	\$1,494,165
Home Improvement & Gardening	\$2,443	\$6,267,020	\$2,678	\$2,734,370	\$1,020	\$1,702,123	\$2,689.5	\$29,587,405	\$1,031.3	\$2,578,236
Books & Media	\$276	\$708,110	\$304	\$310,815	\$2,457	\$4,100,513	\$350.2	\$3,852,310	\$2,576.6	\$6,441,426
Sporting Goods	\$179	\$458,089	\$193	\$196,986	\$422	\$704,053	\$199.1	\$2,190,674	\$257.3	\$643,369
Toys & Hobbies	\$210	\$538,912	\$237	\$241,748	\$171	\$284,818	\$256.3	\$2,819,196	\$168.0	\$419,955
Specialty Retail	\$769	\$1,973,132	\$869	\$887,619	\$233	\$389,016	\$937.7	\$10,315,483	\$234.7	\$586,851
Quick Service F&B	\$549	\$1,408,569	\$595	\$607,722	\$908	\$1,516,180	\$659.5	\$7,255,580	\$832.3	\$2,080,786
Restaurants & Pubs	\$1,208	\$3,099,136	\$1,182	\$1,207,035	\$590	\$984,782	\$1,369.4	\$15,065,022	\$591.5	\$1,478,720
Arts & Entertainment	\$66	\$169,800	\$67	\$67,929	\$1,198	\$1,999,666	\$78.9	\$868,220	\$1,219.5	\$3,048,704
Fitness & Leisure	\$203	\$521,120	\$237	\$242,315	\$68	\$113,529	\$255.0	\$2,805,489	\$72.6	\$181,475
Auto Parts & Accessories	\$1,867	\$4,789,623	\$1,875	\$1,914,183	\$220	\$367,900	\$2,044.8	\$22,494,406	\$216.5	\$541,365
Auto/RV/Motorsports Dealership	\$2,834	\$7,269,189	\$3,205	\$3,272,043	\$1,809	\$3,019,927	\$3,554.0	\$39,097,750	\$1,871.5	\$4,678,853
TOTAL CATEGORIES	\$24,720	\$63,407,808	\$26,005	\$26,550,861	\$23,261	\$38,823,402	\$28,568.6	\$314,283,610	\$23,211.0	\$58,027,621
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$20,019	\$51,348,996	\$20,925	\$21,364,636	\$21,232	\$35,435,575	\$22,969.9	\$252,691,454	\$21,123.0	\$52,807,402
TOTAL Online Sales	\$796	\$2,041,738	\$838	\$855,314	\$1,078	\$1,799,673	\$918.6	\$10,105,144	\$817.0	\$2,042,459

Port Hawkesbury, St. Peter's, Inverness, Ingonish & Baddeck 2031

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category	2031		2031		2031		2031		2031	
	BADDECK TRADE AREA Per Household Retail Spending	BADDECK TRADE AREA Aggregate Retail Spending	INGONISH TRADE AREA Per Household Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INVERNESS TRADE AREA Household Retail Spending	INVERNESS TRADE AREA Aggregate Retail Spending	PORT HAWKESBURY TRADE AREA ANNUAL Household Retail Spending	PORT HAWKESBURY TRADE AREA ANNUAL Aggregate Retail Spending	ST. PETER'S TRADE AREA ANNUAL Household Retail Spending	ST. PETER'S TRADE AREA ANNUAL Aggregate Retail Spending
Grocery & Convenience	\$7,226	\$20,860,481	\$7,422	\$7,273,127	\$7,670	\$12,762,319	\$8,242.5	\$93,955,707	\$7,788.8	\$19,105,997
Pharmacy	\$860	\$2,483,110	\$839	\$822,115	\$886	\$1,473,488	\$945.0	\$10,771,790	\$936.5	\$2,297,345
Alcohol & Tobacco	\$1,274	\$3,677,978	\$1,393	\$1,364,688	\$1,367	\$2,274,110	\$1,500.3	\$17,101,806	\$1,358.2	\$3,331,785
Personal Services	\$1,926	\$5,560,806	\$1,954	\$1,914,716	\$1,966	\$3,271,398	\$2,181.2	\$24,863,646	\$1,883.9	\$4,621,145
Fashion & Accessories	\$1,290	\$3,724,608	\$1,357	\$1,330,339	\$405	\$674,541	\$1,515.8	\$17,278,535	\$400.2	\$981,613
Jewelry	\$95	\$273,292	\$94	\$92,589	\$1,339	\$2,227,491	\$107.4	\$1,223,860	\$1,273.4	\$3,123,538
Health & Beauty	\$499	\$1,440,561	\$493	\$482,770	\$94	\$155,996	\$563.1	\$6,418,914	\$92.4	\$226,685
Home Furniture & Décor	\$625	\$1,804,857	\$648	\$635,347	\$496	\$825,154	\$728.0	\$8,298,781	\$498.8	\$1,223,572
Appliances & Electronics	\$1,040	\$3,003,131	\$1,105	\$1,083,318	\$666	\$1,107,887	\$1,216.0	\$13,861,049	\$628.2	\$1,540,859
Home Improvement & Gardening	\$2,568	\$7,413,570	\$2,815	\$2,758,446	\$1,072	\$1,783,589	\$2,826.7	\$32,221,691	\$1,083.9	\$2,658,808
Books & Media	\$290	\$837,659	\$320	\$313,552	\$2,582	\$4,296,770	\$368.0	\$4,195,297	\$2,708.0	\$6,642,728
Sporting Goods	\$188	\$541,896	\$203	\$198,721	\$443	\$737,750	\$209.3	\$2,385,718	\$270.5	\$663,475
Toys & Hobbies	\$221	\$637,505	\$249	\$243,877	\$179	\$298,450	\$269.3	\$3,070,201	\$176.6	\$433,079
Specialty Retail	\$808	\$2,334,116	\$914	\$895,434	\$245	\$407,635	\$985.5	\$11,233,912	\$246.7	\$605,191
Quick Service F&B	\$577	\$1,666,266	\$626	\$613,073	\$955	\$1,588,746	\$693.2	\$7,901,574	\$874.8	\$2,145,812
Restaurants & Pubs	\$1,270	\$3,666,122	\$1,243	\$1,217,663	\$620	\$1,031,915	\$1,439.3	\$16,406,322	\$621.7	\$1,524,932
Arts & Entertainment	\$70	\$200,865	\$70	\$68,527	\$1,259	\$2,095,373	\$82.9	\$945,521	\$1,281.7	\$3,143,980
Fitness & Leisure	\$214	\$616,458	\$249	\$244,448	\$71	\$118,962	\$268.0	\$3,055,273	\$76.3	\$187,146
Auto Parts & Accessories	\$1,963	\$5,665,883	\$1,970	\$1,931,037	\$232	\$385,508	\$2,149.1	\$24,497,174	\$227.6	\$558,283
Auto/RV/Motorsports Dealership	\$2,979	\$8,599,085	\$3,368	\$3,300,853	\$1,902	\$3,164,465	\$3,735.3	\$42,578,781	\$1,967.0	\$4,825,073
TOTAL CATEGORIES	\$25,981	\$75,008,248	\$27,331	\$26,784,640	\$24,448	\$40,681,546	\$30,025.9	\$342,265,553	\$24,395.0	\$59,841,045
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$21,040	\$60,743,280	\$21,993	\$21,552,751	\$22,315	\$37,131,573	\$24,141.6	\$275,189,597	\$22,200.4	\$54,457,690
TOTAL Online Sales	\$837	\$2,415,274	\$880	\$862,845	\$1,133	\$1,885,808	\$965.4	\$11,004,846	\$858.7	\$2,106,288

Appendix C: Detailed Visitor Spending

Port Hawkesbury, St. Peter's, Inverness, Ingonish & Baddeck 2021

(Source: Province of Nova Scotia, Cabot Cliffs and FBM)

Retail Spending by Merchandise Category	2021		2021		2021		2021		2021	
	BADDECK Visitor Spending	BADDECK Aggregate Visitor Retail Spending	INGONISH Visitor Spending	INGONISH Aggregate Visitor Retail Spending	INVERNESS Visitor Spending	INVERNESS Aggregate Visitor Retail Spending	PORT HAWKESBURY Visitor Spending	PORT HAWKESBURY Aggregate Visitor Retail Spending	ST. PETER'S Visitor Spending	ST PETER'S Aggregate Visitor Retail Spending
Grocery & Convenience	\$1.0	\$200,000	\$1.0	\$150,000	\$1.0	\$150,000	\$1.0	\$50,000	\$1.0	\$100,000
Pharmacy	\$0.2	\$40,000	\$0.2	\$30,000	\$0.2	\$30,000	\$0.2	\$10,000	\$0.2	\$20,000
Alcohol & Tobacco	\$0.6	\$120,000	\$0.6	\$90,000	\$0.6	\$90,000	\$0.6	\$30,000	\$0.6	\$60,000
Personal Services	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Fashion & Accessories	\$1.2	\$240,000	\$1.2	\$180,000	\$1.2	\$180,000	\$1.2	\$60,000	\$1.2	\$120,000
Jewelry	\$0.2	\$40,000	\$0.2	\$30,000	\$0.2	\$30,000	\$0.2	\$10,000	\$0.2	\$20,000
Health & Beauty	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Furniture & Décor	\$0.2	\$40,000	\$0.2	\$30,000	\$0.2	\$30,000	\$0.2	\$10,000	\$0.2	\$20,000
Appliances & Electronics	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Improvement & Gardening	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Books & Media	\$0.2	\$40,000	\$0.2	\$30,000	\$0.2	\$30,000	\$0.2	\$10,000	\$0.2	\$20,000
Sporting Goods	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Toys & Hobbies	\$0.4	\$80,000	\$0.4	\$60,000	\$0.4	\$60,000	\$0.4	\$20,000	\$0.4	\$40,000
Specialty Retail	\$1.0	\$200,000	\$1.0	\$150,000	\$1.0	\$150,000	\$1.0	\$50,000	\$1.0	\$100,000
Quick Service F&B	\$2.8	\$560,000	\$2.8	\$420,000	\$2.8	\$420,000	\$2.8	\$140,000	\$2.8	\$280,000
Restaurants & Pubs	\$6.0	\$1,200,000	\$6.0	\$900,000	\$6.0	\$900,000	\$6.0	\$300,000	\$6.0	\$600,000
Arts & Entertainment	\$1.8	\$360,000	\$1.8	\$270,000	\$1.8	\$270,000	\$1.8	\$90,000	\$1.8	\$180,000
Fitness & Leisure	\$0.2	\$40,000	\$0.2	\$30,000	\$53.3	\$8,000,000	\$0.2	\$10,000	\$0.2	\$20,000
Auto Parts & Accessories & Fuel	\$4.2	\$840,000	\$4.2	\$630,000	\$4.2	\$630,000	\$4.2	\$210,000	\$4.2	\$420,000
Auto/RV/Motorsports Dealership	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
TOTAL CATEGORIES	\$20	\$4,000,000	\$20	\$3,000,000	\$20	\$10,970,000	\$20	\$1,000,000	\$20	\$2,000,000

Port Hawkesbury, St. Peter's, Inverness, Ingonish & Baddeck 2026

(Source: Province of Nova Scotia, Cabot Cliffs and FBM)

Retail Spending by Merchandise Category	2026		2026		2026		2026		2026	
	BADDECK Visitor Spending	BADDECK Aggregate Visitor Retail Spending	INGONISH Visitor Spending	INGONISH Aggregate Visitor Retail Spending	INVERNESS Visitor Spending	INVERNESS Aggregate Visitor Retail Spending	PORT HAWKESBURY Visitor Spending	PORT HAWKESBURY Aggregate Visitor Retail Spending	ST. PETER'S Visitor Spending	ST PETER'S Aggregate Visitor Retail Spending
Grocery & Convenience	\$1.1	\$237,998	\$1.1	\$178,499	\$1.1	\$178,499	\$1.1	\$59,500	\$1.1	\$118,999
Pharmacy	\$0.2	\$47,600	\$0.2	\$35,700	\$0.2	\$35,700	\$0.2	\$11,900	\$0.2	\$23,800
Alcohol & Tobacco	\$0.6	\$142,799	\$0.6	\$107,099	\$0.6	\$107,099	\$0.6	\$35,700	\$0.6	\$71,400
Personal Services	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Fashion & Accessories	\$1.3	\$285,598	\$1.3	\$214,199	\$1.3	\$214,199	\$1.3	\$71,400	\$1.3	\$142,799
Jewelry	\$0.2	\$47,600	\$0.2	\$35,700	\$0.2	\$35,700	\$0.2	\$11,900	\$0.2	\$23,800
Health & Beauty	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Furniture & Décor	\$0.2	\$47,600	\$0.2	\$35,700	\$0.2	\$35,700	\$0.2	\$11,900	\$0.2	\$23,800
Appliances & Electronics	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Improvement & Gardening	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Books & Media	\$0.2	\$47,600	\$0.2	\$35,700	\$0.2	\$35,700	\$0.2	\$11,900	\$0.2	\$23,800
Sporting Goods	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Toys & Hobbies	\$0.4	\$95,199	\$0.4	\$71,400	\$0.4	\$71,400	\$0.4	\$23,800	\$0.4	\$47,600
Specialty Retail	\$1.1	\$237,998	\$1.1	\$178,499	\$1.1	\$178,499	\$1.1	\$59,500	\$1.1	\$118,999
Quick Service F&B	\$2.9	\$666,395	\$2.9	\$499,797	\$2.9	\$499,797	\$2.9	\$166,599	\$2.9	\$333,198
Restaurants & Pubs	\$6.3	\$1,427,990	\$6.3	\$1,070,993	\$6.3	\$1,070,993	\$6.3	\$356,998	\$6.3	\$713,995
Arts & Entertainment	\$1.9	\$428,397	\$1.9	\$321,298	\$1.9	\$321,298	\$1.9	\$107,099	\$1.9	\$214,199
Fitness & Leisure	\$0.2	\$47,600	\$0.2	\$35,700	\$56.1	\$9,519,934	\$0.2	\$11,900	\$0.2	\$23,800
Auto Parts & Accessories & Fuel	\$4.4	\$999,593	\$4.4	\$749,695	\$4.4	\$749,695	\$4.4	\$249,898	\$4.4	\$499,797
Auto/RV/Motorsports Dealership	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
TOTAL CATEGORIES	\$21.0	\$4,759,967	\$21.0	\$3,569,975	\$76.9	\$13,054,209	\$21.0	\$1,189,992	\$21.0	\$2,379,983

Port Hawkesbury, St. Peter's, Inverness, Ingonish & Baddeck 2031

(Source: Province of Nova Scotia, Cabot Cliffs and FBM)

Retail Spending by Merchandise Category	2031		2031		2031		2031		2031	
	BADDECK Visitor Spending	BADDECK Aggregate Visitor Retail Spending	INGONISH Visitor Spending	INGONISH Aggregate Visitor Retail Spending	INVERNESS Visitor Spending	INVERNESS Aggregate Visitor Retail Spending	PORT HAWKESBURY Visitor Spending	PORT HAWKESBURY Aggregate Visitor Retail Spending	ST. PETER'S Visitor Spending	ST PETER'S Aggregate Visitor Retail Spending
Grocery & Convenience	\$1.1	\$269,470	\$1.1	\$202,103	\$1.1	\$202,103	\$1.1	\$67,368	\$1.1	\$134,735
Pharmacy	\$0.2	\$53,894	\$0.2	\$40,421	\$0.2	\$40,421	\$0.2	\$13,474	\$0.2	\$26,947
Alcohol & Tobacco	\$0.7	\$161,682	\$0.7	\$121,262	\$0.7	\$121,262	\$0.7	\$40,421	\$0.7	\$80,841
Personal Services	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Fashion & Accessories	\$1.3	\$323,364	\$1.3	\$242,523	\$1.3	\$242,523	\$1.3	\$80,841	\$1.3	\$161,682
Jewelry	\$0.2	\$53,894	\$0.2	\$40,421	\$0.2	\$40,421	\$0.2	\$13,474	\$0.2	\$26,947
Health & Beauty	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Furniture & Décor	\$0.2	\$53,894	\$0.2	\$40,421	\$0.2	\$40,421	\$0.2	\$13,474	\$0.2	\$26,947
Appliances & Electronics	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Improvement & Gardening	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Books & Media	\$0.2	\$53,894	\$0.2	\$40,421	\$0.2	\$40,421	\$0.2	\$13,474	\$0.2	\$26,947
Sporting Goods	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Toys & Hobbies	\$0.4	\$107,788	\$0.4	\$80,841	\$0.4	\$80,841	\$0.4	\$26,947	\$0.4	\$53,894
Specialty Retail	\$1.1	\$269,470	\$1.1	\$202,103	\$1.1	\$202,103	\$1.1	\$67,368	\$1.1	\$134,735
Quick Service F&B	\$3.1	\$754,517	\$3.1	\$565,888	\$3.1	\$565,888	\$3.1	\$188,629	\$3.1	\$377,259
Restaurants & Pubs	\$6.6	\$1,616,822	\$6.6	\$1,212,617	\$6.6	\$1,212,617	\$6.6	\$404,206	\$6.6	\$808,411
Arts & Entertainment	\$2.0	\$485,047	\$2.0	\$363,785	\$2.0	\$363,785	\$2.0	\$121,262	\$2.0	\$242,523
Fitness & Leisure	\$0.2	\$53,894	\$0.2	\$40,421	\$58.9	\$10,778,815	\$0.2	\$13,474	\$0.2	\$26,947
Auto Parts & Accessories & Fuel	\$4.6	\$1,131,776	\$4.6	\$848,832	\$4.6	\$848,832	\$4.6	\$282,944	\$4.6	\$565,888
Auto/RV/Motorsports Dealership	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
TOTAL CATEGORIES	\$22.1	\$5,389,407	\$22.1	\$4,042,056	\$80.8	\$14,780,450	\$22.1	\$1,347,352	\$22.1	\$2,694,704

Appendix D: Detailed Retail Inventory by Community

NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE CATEGORY	TENANT NAME	BUSINESS ADDRESS	STREET NAME	SIZE (SF)	COMMUNITY
487210	Scenic and sightseeing transportation, water	TOURISM SERVICE	Amoeba Sailing Tours			0	Baddeck
453310	Used merchandise stores	SPECIALTY RETAIL	Antiques Boutique - Baddeck			1,578	Baddeck
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Aphrodite Gift Shop			2,069	Baddeck
721111	Hotels	ACCOMMODATIONS	Auberge Gisele's Inn			20,076	Baddeck
444130	Hardware stores	HOME IMPROVEMENT & GARDENING	Baddeck Building Supplies Co Ltd		22 Twining St	8,000	Baddeck
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Baddeck Celtic Gifts & Tartans			8,253	Baddeck
721191	Bed and breakfast	ACCOMMODATIONS	Baddeck Inn			6,253	Baddeck
722511	Full-service restaurants	FULL SERVICE F&B	Baddeck Lobster Suppers			3,141	Baddeck
713930	Marinas	NON-COMMERCIAL	Baddeck Marine			5,171	Baddeck
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Bayside Haven Vacation Home			789	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	Bean There Café		503 Chebucto St	1,100	Baddeck
721191	Bed and breakfast	ACCOMMODATIONS	Beira's Retreat			2,710	Baddeck
713910	Golf courses and country clubs	NON-COMMERCIAL	Bell Bay Golf Club			19,129	Baddeck
722511	Full-service restaurants	FULL SERVICE F&B	Bell Buoy Restaurant			3,012	Baddeck
721191	Bed and breakfast	ACCOMMODATIONS	Bell View Luxury Suites			2,218	Baddeck
713930	Marinas	NON-COMMERCIAL	Bras D'or Yacht Club			6,046	Baddeck
621320	Offices of optometrists	PROFESSIONAL & FINANCIAL SERVICE	Burns Vision Center		503 Chebucto St	0	Baddeck
561520	Tour operators	TOURISM SERVICE	Cabot Discovery Tours		43 Old Margaree Rd	0	Baddeck
721114	Hotels	ACCOMMODATIONS	Cabot Trail Motel & Cabot Restaurant			18,519	Baddeck
491110	Postal service	INSTITUTIONAL / PUBLIC SERVICE	Canada Post			2,527	Baddeck
812115	Beauty salons	PERSONAL SERVICE	Carol Campbell's Hair Studio Entrenous		503 Chebucto St	1,100	Baddeck
721111	Hotels	ACCOMMODATIONS	Ceilidh Country Lodge			14,236	Baddeck
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Co-op - Baddeck		48 Twining St	13,593	Baddeck
721191	Bed and breakfast	ACCOMMODATIONS	Dunlop Inn			1,379	Baddeck
522130	Local credit unions	PROFESSIONAL & FINANCIAL SERVICE	East Coast Credit Union			3,781	Baddeck
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Flying Kite Artisan Shop		507 Chebucto St	2,000	Baddeck
721111	Hotels	ACCOMMODATIONS	Green Highlander Lodge			1,197	Baddeck
541212	Offices of accountants	PROFESSIONAL & FINANCIAL SERVICE	H&R Block		387 Shore Rd	0	Baddeck
812115	Beauty salons	PERSONAL SERVICE	Hair Salon 36			3,241	Baddeck
531212	Offices of real estate brokers	PROFESSIONAL & FINANCIAL SERVICE				1,339	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	High wheeler Café		466 Chebucto St	1,500	Baddeck
444130	Hardware stores	HOME IMPROVEMENT & GARDENING	Home Hardware		491 Chebucto St	7,500	Baddeck
721113	Resorts	ACCOMMODATIONS	Inverary Resort			13,857	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	Julius Bakery Ltd		48 Twining St	1,250	Baddeck
721113	Resorts	ACCOMMODATIONS	Kildare Landing by Cape Breton Resorts			5,541	Baddeck
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Lakeside Boutique			3,251	Baddeck
722511	Full-service restaurants	FULL SERVICE F&B	Lakeside Restaurant			3,134	Baddeck
721111	Hotels	ACCOMMODATIONS	Lynwood Inn			8,656	Baddeck
721111	Hotels	ACCOMMODATIONS	Macaulay's Hill Farm			1,642	Baddeck
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	Macleod Lorway Insurance		503 Chebucto St	0	Baddeck
541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	Matthew F Hart Law			0	Baddeck
811112	General automotive repair	AUTO SERVICE	Morrison Motors		387 Shore Rd	0	Baddeck
445120	Convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Needs Convenience Baddeck			1,837	Baddeck
445310	Beer, wine and liquor stores	ALCOHOL & TOBACCO	NSLC			6,472	Baddeck
442298	All other home furnishings stores	HOME FURNISHINGS & DÉCOR	Our Seaside Home Décor			1,748	Baddeck
624210	Community food services	INSTITUTIONAL / PUBLIC SERVICE	Pan Cape Breton Food Hub			780	Baddeck
448120	Women's clothing stores	FASHION & FOOTWEAR	Patchouli Accessories Boutique		503 Chebucto St	1,100	Baddeck
446110	Pharmacies and drug stores	PHARMACY	Pharmasave Stone's		491 Chebucto St	4,000	Baddeck
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	RBC			3,038	Baddeck
447190	Other gasoline stations	AUTO FUEL WITH CONVENIENCE	S.J. MACRAE & SON			3,227	Baddeck
721111	Hotels	ACCOMMODATIONS	Silver Dart Lodge			23,778	Baddeck
721114	Hotels	ACCOMMODATIONS	Telegraph House & Motel			10,187	Baddeck
722511	Full-service restaurants	FULL SERVICE F&B	The Freight Shed			1,736	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	The Frozen Spoon		507 Chebucto St	750	Baddeck
812910	Pet care (except veterinary) services	PERSONAL SERVICE	The Golden Collar		503 Chebucto St	1,100	Baddeck
451119	All other sporting goods stores	SPORTING GOODS & OUTDOOR RECREATION	The Outdoor Store		479 Chebucto St	3,500	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	Tim Hortons			2,000	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	Tom's Pizza			3,515	Baddeck
721191	Bed and breakfast	ACCOMMODATIONS	Water's Edge Inn & Gallery			3,044	Baddeck
722511	Full-service restaurants	FULL SERVICE F&B	Wong's Restaurant		466 Chebucto St	2,500	Baddeck
721191	Bed and breakfast	ACCOMMODATIONS	Worn Door Step		43 Old Margaree Rd	0	Baddeck
722511	Full-service restaurants	FULL SERVICE F&B	Yellow Cello Cafe & Pizza			1,406	Baddeck
722512	Limited-service eating places	LIMITED SERVICE F&B	Andrew's Pizzeria		37092 Cabot Trail Rd	1,555	Ingonish
722512	Limited-service eating places	LIMITED SERVICE F&B	Bean Barn Café		36743 Cabot Trail Rd	1,136	Ingonish
722512	Limited-service eating places	LIMITED SERVICE F&B	Brookside Take Out		36188 Cabot Trail Rd	2,191	Ingonish

NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE CATEGORY	TENANT NAME	BUSINESS ADDRESS	STREET NAME	SIZE (SF)	COMMUNITY
491110	Postal service	INSTITUTIONAL / PUBLIC SERVICE	Canada Post		37813 Cabot Trail Rd	1,634	Ingonish
491110	Postal service	INSTITUTIONAL / PUBLIC SERVICE	Canada Post			622	Ingonish
713910	Golf courses and country clubs	NON-COMMERCIAL	Cape Breton Highland Links			59,275	Ingonish
447190	Other gasoline stations	AUTO FUEL WITH CONVENIENCE	Caper Gas Service Station			1,226	Ingonish
721111	Hotels	ACCOMMODATIONS				4,670	Ingonish
721211	Recreational vehicle (RV) parks and campgrounds	ACCOMMODATIONS	Ceilidh's Variety & Campground		35597 Cabot Trail Rd	1,079	Ingonish
445292	Confectionery and nut stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Clay's Confectionary Shop			500	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Coastal Dream Vacation Rental		36785 Cabot Trail Rd	1,779	Ingonish
722410	Drinking places (alcoholic beverages)	FULL SERVICE F&B	Coastal Restaurant & Pub		36404 Cabot Trail Rd	5,080	Ingonish
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Doucette's Market & Eatery			1,500	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Driftwood Lodge		36139 Cabot Trail Rd	1,606	Ingonish
451119	All other sporting goods stores	SPORTING GOODS & OUTDOOR RECREATION	Earth Ocean Outfitting outdoor store		36667 Cabot Trail Rd	1,456	Ingonish
721113	Resorts	ACCOMMODATIONS	Glenghorm Beach Resort		36743 Cabot Trail Rd	30,496	Ingonish
446120	Cosmetics, beauty supplies and perfume stores	HEALTH & BEAUTY	Groovy Goat Farm & Soap Company		36028 Cabot Trail Rd	715	Ingonish
445291	Baked goods stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Happiness Is Homemade		Highland St	1,119	Ingonish
452991	Home and auto supplies stores	HOME IMPROVEMENT & GARDENING	Home Hardware Building Centre			5,484	Ingonish
722330	Mobile food services	LIMITED SERVICE F&B	Hot on the Trail Mobile Foods		33 Smiths Hill Rd	300	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Ingonish Chalets		36784 Cabot Trail Rd	16,376	Ingonish
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Ingonish Freshmart		36346 Cabot Trail Rd	5,360	Ingonish
447190	Other gasoline stations	AUTO FUEL WITH CONVENIENCE	Irving Oil		35688 Cabot Trail Rd	1,460	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Knotty Pine Cottages			7,449	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Lantern Hill & Hollow		36845 Cabot Trail Rd	7,917	Ingonish
722511	Full-service restaurants	FULL SERVICE F&B	Main Street Restaurant			4,822	Ingonish
445310	Beer, wine and liquor stores	ALCOHOL & TOBACCO	NSLC Select			6,191	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Power Brook Accommodations			1,441	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Rocky Bay Cottages		33 Miltons Lane	3,372	Ingonish
445220	Fish and seafood markets	GROCERY, CONVENIENCE & SPECIALTY FOODS	Rod's Lobsters and Fish Market		36450 Cabot Trail Rd	887	Ingonish
444110	Home centres	HOME IMPROVEMENT & GARDENING	RONA Donovan Building Centre		35954 Cabot Trail Rd	5,554	Ingonish
721191	Bed and breakfast	ACCOMMODATIONS	Salty Roses & Periwinkle Café		36056 Cabot Trail Rd	2,369	Ingonish
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	Scotiabank			5,045	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Sea Breeze Cottages And Motel		36104 Cabot Trail Rd	2,921	Ingonish
722511	Full-service restaurants	FULL SERVICE F&B	Seagull Restaurant		35963 Cabot Trail Rd	2,534	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Seascape Coastal Retreat		36086 Cabot Trail Rd	10,982	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Skyline Cabins			5,124	Ingonish
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Sleepy Hollow Cottages		30 Snow Rd	2,746	Ingonish
722512	Limited-service eating places	LIMITED SERVICE F&B	Sugar Witch Cakes			500	Ingonish
721191	Bed and breakfast	ACCOMMODATIONS	The Island Inn and Bed & Breakfast			2,773	Ingonish
721191	Bed and breakfast	ACCOMMODATIONS	The Williams' Beach House		36905 Cabot Trail Rd	2,458	Ingonish
722512	Limited-service eating places	LIMITED SERVICE F&B	A Small Town Deli		15751 Central Avenue	2,408	Inverness
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	AA Munro Insurance		15759 Central Avenue	500	Inverness
541920	Photographic services	BOOKS & MULTI-MEDIA	Betty Ann Cameron Photography			750	Inverness
713910	Golf courses and country clubs	NON-COMMERCIAL	Cabot Cape Breton			71,291	Inverness
721198	All other traveller accommodation	FITNESS & LEISURE	Cabot Mines Golf House			3,259	Inverness
491110	Postal service	INSTITUTIONAL / PUBLIC SERVICE	Canada Post			3,400	Inverness
453920	Art dealers	HOME FURNISHINGS & DÉCOR	Cape Breton Gallery			1,561	Inverness
531212	Offices of real estate brokers	PROFESSIONAL & FINANCIAL SERVICE	Cape Breton Realty		15759 Central Avenue	500	Inverness
713940	Fitness and recreational sports centres	FITNESS & LEISURE	Caper Gym and Fitness Inc			2,000	Inverness
621510	Medical and diagnostic laboratories	PROFESSIONAL & FINANCIAL SERVICE	Ceilidh Denture Clinic		27 James Street	1,000	Inverness
722511	Full-service restaurants	FULL SERVICE F&B	Coal Miners Café			1,692	Inverness
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Co-op			17,389	Inverness
721191	Bed and breakfast	ACCOMMODATIONS	Dusky Diamonds			1,435	Inverness
487210	Scenic and sightseeing transportation, water	TOURISM SERVICE	Eagle Eye Outfitters			1,043	Inverness
522321	Central credit unions	PROFESSIONAL & FINANCIAL SERVICE	East Coast Credit Union			2,883	Inverness
446110	Pharmacies and drug stores	PHARMACY	Freeman's Pharmacy – PharmaChoice			5,552	Inverness
	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Glenora Distillery Gift Shop			750	Inverness
722511	Full-service restaurants	FULL SERVICE F&B	Glenora Distillery Restaurant			2,500	Inverness
541940	Veterinary services	PROFESSIONAL & FINANCIAL SERVICE	Highland Animal Hospital			4,233	Inverness
722512	Limited-service eating places	LIMITED SERVICE F&B	Inverness Beach Hut Eatery			3,826	Inverness
621310	Offices of chiropractors	PROFESSIONAL & FINANCIAL SERVICE	Inverness Chiropractic			1,500	Inverness
484210	Used household and office goods moving	NON-COMMERCIAL	Inverness Freight			0	Inverness
812116	Unisex hair salons	PERSONAL SERVICE	Isabel MacEachern's Beauty Salon		15907 Central Avenue	1,722	Inverness
722512	Limited-service eating places	LIMITED SERVICE F&B	Ivan's Daughters General Store (Ivan's Greco)		15812 Central Avenue	1,070	Inverness
444110	Home centres	HOME IMPROVEMENT & GARDENING	Kent Building Supplies			13,726	Inverness
722512	Limited-service eating places	LIMITED SERVICE F&B	Little Red Wagon			500	Inverness
541212	Offices of accountants	PROFESSIONAL & FINANCIAL SERVICE	Miller Accounting		16 Forest Street	500	Inverness

NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE CATEGORY	TENANT NAME	BUSINESS ADDRESS	STREET NAME	SIZE (SF)	COMMUNITY
		VACANT	New Building			6,000	Inverness
445310	Beer, wine and liquor stores	ALCOHOL & TOBACCO	NSLC Select			5,985	Inverness
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Quincy Street Market			1,488	Inverness
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	RBC			3,044	Inverness
722512	Limited-service eating places	LIMITED SERVICE F&B	Reel Pizza & Sub Shop			2,697	Inverness
722512	Limited-service eating places	LIMITED SERVICE F&B	Robin's Donuts	15896 Central Avenue		3,151	Inverness
312120	Breweries	FULL SERVICE F&B	Route 19 Brewing			6,214	Inverness
453110	Florists	SPECIALTY RETAIL	Seaview Flowers, Gifts and Boutique			2,575	Inverness
445120	Convenience stores	PHARMACY	The [Inverness] Pantry Provisions and Conveniences	15938 Central Avenue		1,807	Inverness
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	The Bear Paw	15788 Central Avenue		1,500	Inverness
511110	Newspaper publishers	INSTITUTIONAL / PUBLIC SERVICE	The Inverness Oran			2,302	Inverness
448150	Clothing accessories stores	FASHION & FOOTWEAR	The Opulent Alpaca	15755 Central Avenue		2,000	Inverness
621210	Offices of dentists	PROFESSIONAL & FINANCIAL SERVICE	Tri Harbour Dental Corporation			2,216	Inverness
447190	Other gasoline stations	AUTO FUEL WITH CONVENIENCE	Ultramar			2,340	Inverness
722512	Limited-service eating places	LIMITED SERVICE F&B	Westside Café			2,410	Inverness
722511	Full-service restaurants	FULL SERVICE F&B	Whit's Public House			3,053	Inverness
452999	All other miscellaneous general merchandise stores	SPECIALTY RETAIL	Your Dollar Store with More			2,000	Inverness
515110	Radio broadcasting	INSTITUTIONAL / PUBLIC SERVICE	101.5 CIGO FM (The Hawk)			6,665	Port Hawkesbury
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	3C Wealth Partners	811 Reeves St		1,737	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	A & W			2,833	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	A1 Pizza			3,251	Port Hawkesbury
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	AA Munro Insurance	326 Granville St		1,430	Port Hawkesbury
488331	Marine salvage services	NON-COMMERCIAL	Atlantic Marine & Ind Rigging Ltd			3,426	Port Hawkesbury
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Atlantic Superstore			50,062	Port Hawkesbury
442110	Furniture stores	HOME FURNISHINGS & DÉCOR	B&B Furniture Warehouse	649 Reeves St		2,000	Port Hawkesbury
332910	Metal valve manufacturing	NON-COMMERCIAL	B&N Distributors	15 Paint St		0	Port Hawkesbury
445291	Baked goods stores	LIMITED SERVICE F&B	Belinda N Colleen's Cakes N			5,705	Port Hawkesbury
517310	Wired and wireless telecommunications carriers (except satellite)	SPECIALTY RETAIL	Bell Aliant	811 Reeves St		1,000	Port Hawkesbury
621340	Offices of physical, occupational, and speech therapists and audiologists	PROFESSIONAL & FINANCIAL SERVICE	Beltone Hearing Aid Clinic	622 Reeves St		0	Port Hawkesbury
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	BMO	622 Reeves St		3,888	Port Hawkesbury
621390	Offices of all other health practitioners	PROFESSIONAL & FINANCIAL SERVICE	Boudreau Denture Clinic			3,625	Port Hawkesbury
721192	Housekeeping cottages and cabins	ACCOMMODATIONS	Breton House			698	Port Hawkesbury
454311	Heating oil dealers	NON-COMMERCIAL	Breton Petroleum Ltd.			18,094	Port Hawkesbury
524111	Direct individual life, health and medical insurance carriers	PROFESSIONAL & FINANCIAL SERVICE	Breton Wealth Management	301 Pitt St		3,497	Port Hawkesbury
541370	Surveying and mapping (except geophysical) services	NON-COMMERCIAL	Brian A. Anderson & Associates			3,342	Port Hawkesbury
541330	Engineering services	NON-COMMERCIAL	Bruce Chisholm Logging & Logistics			0	Port Hawkesbury
413410	Cannabis merchant wholesalers	ALCOHOL & TOBACCO	Bulk Marijuana Seeds			500	Port Hawkesbury
452991	Home and auto supplies stores	AUTO PARTS & ACCESSORIES	Bumper to Bumper	622 Reeves St		3,360	Port Hawkesbury
621320	Offices of optometrists	PROFESSIONAL & FINANCIAL SERVICE	Burns Vision Centre	714 Reeves St		1,500	Port Hawkesbury
811121	Automotive body, paint and interior repair and maintenance	AUTO SERVICE	C&C Automotive Repair	11 Paint St		0	Port Hawkesbury
911390	Other Federal labour, employment and immigration services	INSTITUTIONAL / PUBLIC SERVICE	Canada Food Inspection	811 Reeves St		4,000	Port Hawkesbury
911390	Other Federal labour, employment and immigration services	INSTITUTIONAL / PUBLIC SERVICE	Canada Marine Safety	811 Reeves St		4,000	Port Hawkesbury
491110	Postal service	INSTITUTIONAL / PUBLIC SERVICE	Canada Post			6,414	Port Hawkesbury
452110	Department stores	GENERAL MERCHANDISE	Canadian Tire			29,653	Port Hawkesbury
447110	Gasoline stations with convenience stores	AUTO FUEL WITH CONVENIENCE	Canadian Tire Gas+			7,995	Port Hawkesbury
441110	New car dealers	AUTO/RV/MOTORSPORTS DEALERSHIP	Canso Ford Sales			12,544	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	Captain Paulie's Sports Bar & Grill	622 Reeves St		3,149	Port Hawkesbury
811121	Automotive body, paint and interior repair and maintenance	AUTO SERVICE	CarrXpert Port Hawkesbury Collision Centre			10,287	Port Hawkesbury
453310	Used merchandise stores	SPECIALTY RETAIL	Cathy's Consignment Boutique	15 Paint St		1,000	Port Hawkesbury
444190	Other building material dealers	HOME IMPROVEMENT & GARDENING	Causeway Electrical Supplies			3,277	Port Hawkesbury
621320	Offices of optometrists	PROFESSIONAL & FINANCIAL SERVICE	Causeway Optical	811 Reeves St		3,000	Port Hawkesbury
812114	Barber shops	PERSONAL SERVICE	Celtic Clipper Barber Shop			750	Port Hawkesbury
442210	Floor covering stores	HOME FURNISHINGS & DÉCOR	Chafe's Furniture & Flooring Ltd.			10,812	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	China King Buffet Restaurant	825 Reeves St		2,594	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	Country Kitchen Restaurant			12,346	Port Hawkesbury
811121	Automotive body, paint and interior repair and maintenance	AUTO SERVICE	CSN Hughie's			10,116	Port Hawkesbury
711511	Independent visual artists and artisans	SPECIALTY RETAIL	Customs House Artisan Incubator			2,062	Port Hawkesbury
812116	Unisex hair salons	PERSONAL SERVICE	Cutting Edge Studio	47 Paint St		0	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	Dairy Queen Grill & Chill			2,996	Port Hawkesbury
485310	Taxi service	NON-COMMERCIAL	Dave's Taxi			0	Port Hawkesbury
812210	Funeral homes	INSTITUTIONAL / PUBLIC SERVICE	Dennis Haverstock Funeral Homes Ltd.			7,725	Port Hawkesbury
811199	All other automotive repair and maintenance	AUTO PARTS & ACCESSORIES	Direct Tire Ltd			4,464	Port Hawkesbury
452999	All other miscellaneous general merchandise stores	SPECIALTY RETAIL	Dollarama	47 Paint St		0	Port Hawkesbury
722511	Full-service restaurants	ARTS & ENTERTAINMENT	Dooly's Billiard Room	622 Reeves St		6,790	Port Hawkesbury
522130	Local credit unions	PROFESSIONAL & FINANCIAL SERVICE	East Coast Credit Union	714 Reeves St		8,000	Port Hawkesbury

NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE CATEGORY	TENANT NAME	BUSINESS ADDRESS	STREET NAME	SIZE (SF)	COMMUNITY
52291	Consumer lending	PROFESSIONAL & FINANCIAL SERVICE	easyfinancial Services		47 Paint St	0	Port Hawkesbury
541514	Computer systems design and related services (except video game design and development)	PROFESSIONAL & FINANCIAL SERVICE	eLantec IT Consulting			0	Port Hawkesbury
541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	EMM Law Firm			3,333	Port Hawkesbury
532111	Passenger car rental	NON-COMMERCIAL	Enterprise Rent-A-Car		46 Paint St	0	Port Hawkesbury
444210	Outdoor power equipment stores	NON-COMMERCIAL	Evanston Contracting and Repair		11 Paint St	0	Port Hawkesbury
488511	Marine shipping agencies	NON-COMMERCIAL	FK Warren Ltd			1,982	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	Fleur de-Lis Tea Room and Dining Room		622 Reeves St	2,335	Port Hawkesbury
721191	Bed and breakfast	ACCOMMODATIONS	Gagnon House Bed & Breakfast			1,077	Port Hawkesbury
441110	New car dealers	AUTO/RV/MOTORSPORTS DEALERSHIP	Gateway Hyundai			11,260	Port Hawkesbury
452110	Department stores	GENERAL MERCHANDISE	Giant Tiger		47 Paint St	0	Port Hawkesbury
453110	Florists	SPECIALTY RETAIL	Glorious Floral Designs		47 Paint St	0	Port Hawkesbury
611510	Technical and trade schools	INSTITUTIONAL / PUBLIC SERVICE	Grampus Inc.		206 Pitt St	0	Port Hawkesbury
541213	Tax preparation services	PROFESSIONAL & FINANCIAL SERVICE	H&R Block		47 Paint St	0	Port Hawkesbury
812115	Beauty salons	PERSONAL SERVICE	Hairington's Hair Co			1,649	Port Hawkesbury
453910	Pet and pet supplies stores	SPECIALTY RETAIL	Harbellas Pet Supplies and Spaw		622 Reeves St	2,335	Port Hawkesbury
721114	Motels	ACCOMMODATIONS	Harbourview Motel & Accommodations			4,576	Port Hawkesbury
721111	Hotels	ACCOMMODATIONS	Hearthstone Inn			0	Port Hawkesbury
541940	Veterinary services	PROFESSIONAL & FINANCIAL SERVICE	Highland Animal Hospital			3,255	Port Hawkesbury
443143	Appliance, television and other electronics stores	SPECIALTY RETAIL	Highland Cellular		47 Paint St	0	Port Hawkesbury
621340	Offices of physical, occupational, and speech therapists and audiologists	PROFESSIONAL & FINANCIAL SERVICE	Highland Hearing Clinic Ltd		920 Reeves St	1,000	Port Hawkesbury
541215	Bookkeeping, payroll and related services	PROFESSIONAL & FINANCIAL SERVICE	HML Bookkeeping Services		208 Napean St	0	Port Hawkesbury
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	IG Wealth Management		811 Reeves St	1,500	Port Hawkesbury
621310	Offices of chiropractors	PROFESSIONAL & FINANCIAL SERVICE	In Motion Chiropractic Centre			1,562	Port Hawkesbury
453999	All other miscellaneous store retailers (except beer and wine-making supplies stores)	SPECIALTY RETAIL	Island Hemp			500	Port Hawkesbury
812210	Funeral homes	INSTITUTIONAL / PUBLIC SERVICE	J.F. Green Funeral Services Limited			2,797	Port Hawkesbury
541920	Photographic services	BOOKS & MULTI-MEDIA	Jack Ronalds Photography		208 Reynolds St	750	Port Hawkesbury
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Jacky's Asian Store		622 Reeves St	2,335	Port Hawkesbury
811199	All other automotive repair and maintenance	AUTO SERVICE	Jamo's Auto and Wash			4,341	Port Hawkesbury
444110	Home centres	HOME IMPROVEMENT & GARDENING	Kent Building Supplies			47,394	Port Hawkesbury
812190	Other personal care services	PERSONAL SERVICE	Kosmetikos Salon & Spa			17,824	Port Hawkesbury
541430	Graphic design services	PROFESSIONAL & FINANCIAL SERVICE	Lupin Design Studio		114 Kennedy St	0	Port Hawkesbury
445120	Convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	MacIsaac's Variety Store			2,363	Port Hawkesbury
721191	Bed and breakfast	ACCOMMODATIONS	MacKenzie House Tourist Home B&B			1,184	Port Hawkesbury
524129	Other direct insurance (except life, health and medical) carriers	PROFESSIONAL & FINANCIAL SERVICE	MacLeod Lorway Insurance		920 Reeves St	3,000	Port Hawkesbury
811111	General automotive repair	AUTO SERVICE	MacMotors Ltd.			5,127	Port Hawkesbury
721191	Bed and breakfast	ACCOMMODATIONS	Maggie's B&B			2,493	Port Hawkesbury
811192	Car washes	AUTO SERVICE	Magic Express Car Wash			1,940	Port Hawkesbury
339950	Sign manufacturing	NON-COMMERCIAL	Maple Signs & Engraving		2 Macintosh Ave	0	Port Hawkesbury
721111	Hotels	ACCOMMODATIONS	Maritime Inn Port Hawkesbury			14,637	Port Hawkesbury
561510	Travel agencies	TOURISM SERVICE	Maritime Travel		47 Paint St	0	Port Hawkesbury
448140	Family clothing stores	FASHION & FOOTWEAR	Marks		47 Paint St	0	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	McDonald's			5,096	Port Hawkesbury
561722	Janitorial services (except window cleaning)	PERSONAL SERVICE	Megan Boudreau - The Cleaning Lady			500	Port Hawkesbury
441110	New car dealers	AUTO/RV/MOTORSPORTS DEALERSHIP	Midway Motors			2,542	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	Miller's			6,971	Port Hawkesbury
811210	Electronic and precision equipment repair and maintenance	PERSONAL SERVICE	Mitchell Computer Repairs		45 Napean St	500	Port Hawkesbury
812115	Beauty salons	PERSONAL SERVICE	Nani's Esthetics and Laser Center			3,098	Port Hawkesbury
441310	Automotive parts and accessories stores	AUTO SERVICE	Napa Auto Parts-Robertson Automotive			5,163	Port Hawkesbury
445120	Convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Needs Convenience			750	Port Hawkesbury
238910	Site preparation contractors	NON-COMMERCIAL	Norvon Enterprises			3,367	Port Hawkesbury
445310	Beer, wine and liquor stores	PROFESSIONAL & FINANCIAL SERVICE	Nova Scotia Health Authority		708 Reeves St	22,836	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	NSLC		622 Reeves St	8,838	Port Hawkesbury
441310	Automotive parts and accessories stores	AUTO PARTS & ACCESSORIES	Papa's Pub & Eatery		714 Reeves St	3,500	Port Hawkesbury
453910	Pet and pet supplies stores	SPECIALTY RETAIL	Parts Connection			11,794	Port Hawkesbury
541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	Pet Valu		47 Paint St	0	Port Hawkesbury
441110	New car dealers	PROFESSIONAL & FINANCIAL SERVICE	Pickup MacDowell Law Office			1,579	Port Hawkesbury
713990	Other amusement and recreation industries	AUTO/RV/MOTORSPORTS DEALERSHIP	Port Honda			8,259	Port Hawkesbury
541110	Offices of lawyers	ARTS & ENTERTAINMENT	Power Play Entertainment Centre		622 Reeves St	10,673	Port Hawkesbury
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	R. Fourgere Law Inc		298 Reeves St	0	Port Hawkesbury
531212	Offices of real estate brokers	PROFESSIONAL & FINANCIAL SERVICE	RBC			4,808	Port Hawkesbury
812114	Barber shops	PROFESSIONAL & FINANCIAL SERVICE	REMAX			700	Port Hawkesbury
442110	Furniture stores	PERSONAL SERVICE	Sandi's Barber Shop		811 Reeves St	1,000	Port Hawkesbury
522111	Personal and commercial banking industry	HOME FURNISHINGS & DÉCOR	Schwartz Furniture			10,607	Port Hawkesbury
811199	All other automotive repair and maintenance	PROFESSIONAL & FINANCIAL SERVICE	Scotiabank		622 Reeves St	4,485	Port Hawkesbury
		AUTO SERVICE	Seaboard Tire Service			3,416	Port Hawkesbury

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812190	Other personal care services	PERSONAL SERVICE	Secrets Spa & Hair Design			2,552	Port Hawkesbury
911390	Other Federal labour, employment and immigration services	INSTITUTIONAL / PUBLIC SERVICE	Service Canada	811 Reeves St		5,000	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	Shindigs Pub			3,471	Port Hawkesbury
812310	Coin-operated laundries and dry cleaners	PERSONAL SERVICE	Ship Harbour Suds	506 Church St		1,261	Port Hawkesbury
446110	Pharmacies and drug stores	PHARMACY	Shoppers Drug Mart	622 Reeves St		15,466	Port Hawkesbury
323119	Other printing	SPECIALTY RETAIL	Snow's Econoprint			1,635	Port Hawkesbury
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Sobeys	622 Reeves St		35,347	Port Hawkesbury
561799	All other services to buildings and dwellings	NON-COMMERCIAL	Sound Source Pro Audio & Lighting			0	Port Hawkesbury
811122	Automotive glass replacement shops	AUTO SERVICE	Speedy Glass Signs and Accessories			0	Port Hawkesbury
621340	Offices of physical, occupational, and speech therapists and audiologists	PROFESSIONAL & FINANCIAL SERVICE	Stephanie Beaton Physiotherapy			0	Port Hawkesbury
811121	Automotive body, paint and interior repair and maintenance	AUTO SERVICE	Strait Car Care	649 Reeves St		5,234	Port Hawkesbury
541940	Veterinary services	PROFESSIONAL & FINANCIAL SERVICE	Strait Veterinary Hospital	714 Reeves St		2,000	Port Hawkesbury
812114	Barber shops	PERSONAL SERVICE	Styles & Staches Salon Services	622 Reeves St		1,057	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	Subway			1,828	Port Hawkesbury
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	TD Canada Trust			2,801	Port Hawkesbury
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	TD Canada Trust Branch and ATM	298 Reeves St		0	Port Hawkesbury
812910	Pet care (except veterinary) services	PERSONAL SERVICE	The Dog Place Inc.	98 Reeves St		1,000	Port Hawkesbury
453310	Used merchandise stores	SPECIALTY RETAIL	The Bargain Shop (tbls)	622 Reeves St		21,299	Port Hawkesbury
722511	Full-service restaurants	FULL SERVICE F&B	The Carriage House	825 Reeves St		2,500	Port Hawkesbury
522390	Other activities related to credit intermediation	PROFESSIONAL & FINANCIAL SERVICE	The Cash Store			16,896	Port Hawkesbury
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	The Co-operators	811 Reeves St		2,000	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	The GrooveBox			750	Port Hawkesbury
446110	Pharmacies and drug stores	PHARMACY	The Medicine Shoppe Pharmacy	708 Reeves St		2,000	Port Hawkesbury
511110	Newspaper publishers	INSTITUTIONAL / PUBLIC SERVICE	The Reporter (Advocate Media Inc)			1,687	Port Hawkesbury
621499	All other out-patient care centres	PROFESSIONAL & FINANCIAL SERVICE	the Snore Shop	298 Reeves St		0	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	Tim Hortons			3,326	Port Hawkesbury
722512	Limited-service eating places	LIMITED SERVICE F&B	Tim Hortons	920 Reeves St		2,178	Port Hawkesbury
441110	New car dealers	AUTO/RV/MOTORSPORTS DEALERSHIP	Tri-Mac Toyota	46 Paint St		19,317	Port Hawkesbury
532120	Truck, utility trailer and recreational vehicle (RV) rental and leasing	NON-COMMERCIAL	U-Haul			0	Port Hawkesbury
447190	Other gasoline stations	AUTO FUEL WITH CONVENIENCE	Ultramar			1,595	Port Hawkesbury
813930	Labour organizations	NON-COMMERCIAL	Unifor			3,658	Port Hawkesbury
532410	Construction, transportation, mining, and forestry machinery and equipment rental and leasing	NON-COMMERCIAL	United Rentals			10,864	Port Hawkesbury
VACANT		VACANT	VACANT (FORMER KFC)	Reeves St		2,800	Port Hawkesbury
VACANT		VACANT	VACANT UNIT 10	811 Reeves St		1,000	Port Hawkesbury
VACANT		VACANT	VACANT UNIT 6	811 Reeves St		2,000	Port Hawkesbury
VACANT		VACANT	VACANT UNIT 80.1	622 Reeves St		5,600	Port Hawkesbury
446130	Optical goods stores	SPECIALTY RETAIL	Vogue Optical	622 Reeves St		1,525	Port Hawkesbury
532410	Construction, transportation, mining, and forestry machinery and equipment rental and leasing	NON-COMMERCIAL	Wajax	15 Paint St		0	Port Hawkesbury
452110	Department stores	GENERAL MERCHANDISE	Walmart Supercentre	47 Paint St		0	Port Hawkesbury
532410	Construction, transportation, mining, and forestry machinery and equipment rental and leasing	NON-COMMERCIAL	Woodys Crane Rentals			2,371	Port Hawkesbury
448199	All other clothing stores	FASHION & FOOTWEAR	Workman's Port Hastings			1,000	Port Hawkesbury
453310	Used merchandise stores	SPECIALTY RETAIL	Worth The Wait Consignments	2 Macintosh Ave		1,000	Port Hawkesbury
236110	Residential building construction	NON-COMMERCIAL	All County Construction Limited			1,500	St. Peter's
812116	Unisex hair salons	PERSONAL SERVICE	Alyson's Styling Boutique			1,000	St. Peter's
442291	Window treatment stores	HOME IMPROVEMENT & GARDENING	Amy's Fabrications			1,500	St. Peter's
445120	Convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	B&E General Store	9394 Pepperell St		2,200	St. Peter's
524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	Bluenose Insurance Brokers			961	St. Peter's
721111	Hotels	ACCOMMODATIONS	Bras d'Or Lakes Inn			9,959	St. Peter's
		PROFESSIONAL & FINANCIAL SERVICE	Bras d'Or Physiotherapy			0	St. Peter's
443146	Audio and video recordings stores	HOME ELECTRONICS & APPLIANCES	C & M Video 2000	10054 Grenville St		750	St. Peter's
491110	Postal service	INSTITUTIONAL / PUBLIC SERVICE	Canada Post			1,688	St. Peter's
621210	Offices of dentists	PROFESSIONAL & FINANCIAL SERVICE	Canal Dental	9943 Grenville St		750	St. Peter's
332810	Coating, engraving, cold and heat treating and allied activities	SPECIALTY RETAIL	Canal Trophy & Engraving	10054 Grenville St		1,000	St. Peter's
531212	Offices of real estate brokers	PROFESSIONAL & FINANCIAL SERVICE	Cape Breton Realty			500	St. Peter's
487210	Scenic and sightseeing transportation, water	TOURISM SERVICE	Cape Breton Sailing Charters	10101 Grenville St		0	St. Peter's
611690	All other schools and instruction	FITNESS & LEISURE	Cape Breton Sailing School			1,763	St. Peter's
447190	Other gasoline stations	AUTO FUEL WITH CONVENIENCE	Caper Gas Station (S & M Services)	10015 Grenville St		500	St. Peter's
452991	Home and auto supplies stores	AUTO PARTS & ACCESSORIES	Carquest Auto Parts -St. Peter's Automotive			4,443	St. Peter's
812116	Unisex hair salons	PERSONAL SERVICE	Carrie's Custom Cuts	9971 Grenville St		750	St. Peter's
722330	Mobile food services	LIMITED SERVICE F&B	Chubby's Lunch			1,000	St. Peter's
713940	Fitness and recreational sports centres	FITNESS & LEISURE	Circle of Gym Fitness Centre			4,663	St. Peter's
621320	Offices of optometrists	PROFESSIONAL & FINANCIAL SERVICE	Coastal Vision Clinic			1,461	St. Peter's
811210	Electronic and precision equipment repair and maintenance	AUTO SERVICE	Cutters Edge Small Engine Repair	10015 Grenville St		0	St. Peter's
		LIMITED SERVICE F&B	Diddle's Cafe and Bakery			0	St. Peter's
522321	Central credit unions	PROFESSIONAL & FINANCIAL SERVICE	East Coast Credit Union			3,052	St. Peter's

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812115	Beauty salons	PERSONAL SERVICE	Edwina's Hair Design			1,000	St. Peter's
448310	Jewellery stores	JEWELRY	Encore Jewellery	10101 Grenville St		0	St. Peter's
311920	Coffee and tea manufacturing	SPECIALTY RETAIL	Fire & Stone Coffee Roasters and Pottery Studio			0	St. Peter's
445110	Supermarkets and other grocery (except convenience) stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Foodland - Village Grocery			8,838	St. Peter's
541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	Front Line Law Inc.	10036 Grenville St		2,815	St. Peter's
453999	All other miscellaneous store retailers (except beer and wine-making supplies stores)	SPECIALTY RETAIL	Glad Tidings Christmas Shoppe	9969 Grenville St		1,634	St. Peter's
452999	All other miscellaneous general merchandise stores	SPECIALTY RETAIL	Great Canadian Dollar Store			5,000	St. Peter's
561730	Landscaping services	NON-COMMERCIAL	Green Butler Landscape Services			0	St. Peter's
444220	Nursery stores and garden centres	HOME IMPROVEMENT & GARDENING	Greenhouse Co-Op Ltd			10,572	St. Peter's
541430	Graphic design services	PROFESSIONAL & FINANCIAL SERVICE	Greg Silver Graphic Design	10101 Grenville St		0	St. Peter's
531212	Offices of real estate brokers	PROFESSIONAL & FINANCIAL SERVICE	Harvey Realities Ltd.			704	St. Peter's
812210	Funeral homes	INSTITUTIONAL / PUBLIC SERVICE	Haverstock Dennis Funeral Homes Ltd			2,137	St. Peter's
446191	Food (health) supplement stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	It's Only Natural General Nutrition			0	St. Peter's
811121	Automotive body, paint and interior repair and maintenance	AUTO SERVICE	J.P.L. AUTO			2,801	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	Jiggs Take-Out			3,033	St. Peter's
541810	Advertising agencies	PROFESSIONAL & FINANCIAL SERVICE	Joe Pop Images (Graphic Promotions)	9394 Pepperell St		0	St. Peter's
812114	Barber shops	PERSONAL SERVICE	Joey's Barber Shop			473	St. Peter's
621390	Offices of all other health practitioners	PROFESSIONAL & FINANCIAL SERVICE	Kin Excel Pedorthic and Bracing Clinic	9971 Grenville St		0	St. Peter's
722511	Full-service restaurants	FULL SERVICE F&B	Louie's Cosy Corner			2,787	St. Peter's
722511	Full-service restaurants	FULL SERVICE F&B	MacBouch Restaurant & Lounge			3,697	St. Peter's
446110	Pharmacies and drug stores	PHARMACY	MacDonnell Guardian Pharmacy	10024 Grenville St		1,000	St. Peter's
453999	All other miscellaneous store retailers (except beer and wine-making supplies stores)	SPECIALTY RETAIL	Maclsaac Kiltmakers			500	St. Peter's
811412	Appliance repair and maintenance	PERSONAL SERVICE	Mike's Appliance Repair			1,000	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	New Orleans Pizza	10041 Grenville St		500	St. Peter's
445310	Beer, wine and liquor stores	ALCOHOL & TOBACCO	NSLC			8,820	St. Peter's
621499	All other out-patient care centres	PROFESSIONAL & FINANCIAL SERVICE	OceanView Wellness Centre	10041 Grenville St		2,000	St. Peter's
811199	All other automotive repair and maintenance	AUTO PARTS & ACCESSORIES	OK Tire Ltd.			2,714	St. Peter's
721111	Hotels	ACCOMMODATIONS	Pepperell Place Inn / Yellow Seabird B&B Inn	9383 Grenville St		3,020	St. Peter's
522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	RBC			2,578	St. Peter's
531130	Self-storage mini-warehouses	NON-COMMERCIAL	Richmond County Self Storage			2,511	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	Robin's Donuts	10041 Grenville St		600	St. Peter's
812190	Other personal care services	PERSONAL SERVICE	Sisters By The Sea Spa	9943 Grenville St		750	St. Peter's
444110	Home centres	HOME IMPROVEMENT & GARDENING	St. Peter's Home Hardware			8,000	St. Peter's
453220	Gift, novelty and souvenir stores	SPECIALTY RETAIL	Steff's Celtic Gift Shop	10041 Grenville St		1,750	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	Student Ice Cream			500	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	Subway	10041 Grenville St		1,750	St. Peter's
812310	Coin-operated laundries and dry cleaners	PERSONAL SERVICE	Sudzzz Laundromat			450	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	The Farmer's Pantry			1,299	St. Peter's
722512	Limited-service eating places	LIMITED SERVICE F&B	Tim Hortons			1,342	St. Peter's
453110	Florists	SPECIALTY RETAIL	Timeless Floral & Finds	10041 Grenville St		1,500	St. Peter's
811199	All other automotive repair and maintenance	AUTO SERVICE	Toulouse Auto Repair Ltd.			1,604	St. Peter's
454311	Heating oil dealers	NON-COMMERCIAL	Ultramar	10024 Grenville St		0	St. Peter's
		VACANT	VACANT (BESIDE TIM HORTON'S)			1,000	St. Peter's
		VACANT	VACANT (FORMER NSLC)			4,000	St. Peter's
541215	Bookkeeping, payroll and related services	PROFESSIONAL & FINANCIAL SERVICE	VEC Pro Tax & Accounting	9394 Pepperell St		500	St. Peter's
541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	Winter Ivo			1,174	St. Peter's
336611	Ship building and repairing	NON-COMMERCIAL	WMB Marine Services, Ltd			1,058	St. Peter's
		ALCOHOL & TOBACCO	Canadian Tire			0	
		AUTO PARTS & ACCESSORIES	Canadian Tire			0	
		AUTO/RV/MOTORSPORTS DEALERSHIP	Canadian Tire			0	
		BOOKS & MULTI-MEDIA	Canadian Tire			0	
		CLOTHING & APPAREL	Canadian Tire			0	
		ENTERTAINMENT & LEISURE	Canadian Tire			0	
		FOOTWEAR	Canadian Tire			0	
		FULL SERVICE F&B	Canadian Tire			0	
		GROCERY & SPECIALTY FOODS	Canadian Tire			0	
		HEALTH & BEAUTY	Canadian Tire			0	
		HOME ELECTRONICS & APPLIANCES	Canadian Tire			0	
		HOME FURNISHINGS & APPLIANCES	Canadian Tire			0	
		HOME IMPROVEMENT & GARDENING	Canadian Tire			0	
		JEWELRY & ACCESSORIES	Canadian Tire			0	
		LIMITED SERVICES F&B	Canadian Tire			0	
		PERSONAL SERVICES	Canadian Tire			0	
		PHARMACY	Canadian Tire			0	
		SPECIALTY RETAIL	Canadian Tire			0	

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		SPORTING GOODS & OUTDOOR RECREATION	Canadian Tire			0	
		TOYS & HOBBIES	Canadian Tire			0	
		ALCOHOL & TOBACCO	Giant Tiger			0	
		AUTO PARTS & ACCESSORIES	Giant Tiger			0	
		AUTO/RV/MOTORSPORTS DEALERSHIP	Giant Tiger			0	
		BOOKS & MULTI-MEDIA	Giant Tiger			0	
		CLOTHING & APPAREL	Giant Tiger			0	
		ENTERTAINMENT & LEISURE	Giant Tiger			0	
		FOOTWEAR	Giant Tiger			0	
		FULL SERVICE F&B	Giant Tiger			0	
		GROCERY & SPECIALTY FOODS	Giant Tiger			0	
		HEALTH & BEAUTY	Giant Tiger			0	
		HOME ELECTRONICS & APPLIANCES	Giant Tiger			0	
		HOME FURNISHINGS & APPLIANCES	Giant Tiger			0	
		HOME IMPROVEMENT & GARDENING	Giant Tiger			0	
		JEWELRY & ACCESSORIES	Giant Tiger			0	
		LIMITED SERVICES F&B	Giant Tiger			0	
		PERSONAL SERVICES	Giant Tiger			0	
		PHARMACY	Giant Tiger			0	
		SPECIALTY RETAIL	Giant Tiger			0	
		SPORTING GOODS & OUTDOOR RECREATION	Giant Tiger			0	
		TOYS & HOBBIES	Giant Tiger			0	
		ALCOHOL & TOBACCO	Walmart Supercentre			0	
		AUTO PARTS & ACCESSORIES	Walmart Supercentre			0	
		AUTO/RV/MOTORSPORTS DEALERSHIP	Walmart Supercentre			0	
		BOOKS & MULTI-MEDIA	Walmart Supercentre			0	
		CLOTHING & APPAREL	Walmart Supercentre			0	
		ENTERTAINMENT & LEISURE	Walmart Supercentre			0	
		FOOTWEAR	Walmart Supercentre			0	
		FULL SERVICE F&B	Walmart Supercentre			0	
		GROCERY & SPECIALTY FOODS	Walmart Supercentre			0	
		HEALTH & BEAUTY	Walmart Supercentre			0	
		HOME ELECTRONICS & APPLIANCES	Walmart Supercentre			0	
		HOME FURNISHINGS & APPLIANCES	Walmart Supercentre			0	
		HOME IMPROVEMENT & GARDENING	Walmart Supercentre			0	
		JEWELRY & ACCESSORIES	Walmart Supercentre			0	
		LIMITED SERVICES F&B	Walmart Supercentre			0	
		PERSONAL SERVICES	Walmart Supercentre			0	
		PHARMACY	Walmart Supercentre			0	
		SPECIALTY RETAIL	Walmart Supercentre			0	
		SPORTING GOODS & OUTDOOR RECREATION	Walmart Supercentre			0	
		TOYS & HOBBIES	Walmart Supercentre			0	

