



Ingonish Retail Market Analysis

Cape Breton Regional Enterprise Network

April 2022

www.experienceingonish.com



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.



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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 community of Ingonish as part of a larger study of Port Hawkesbury, St. Peter’s, Inverness, and Baddeck.

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. As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed permission of the Cape Breton Partnership or FBM.

2.0 Retail Market Assessment

2.1 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.

2.2 Trade Area

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 Ingonish’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.

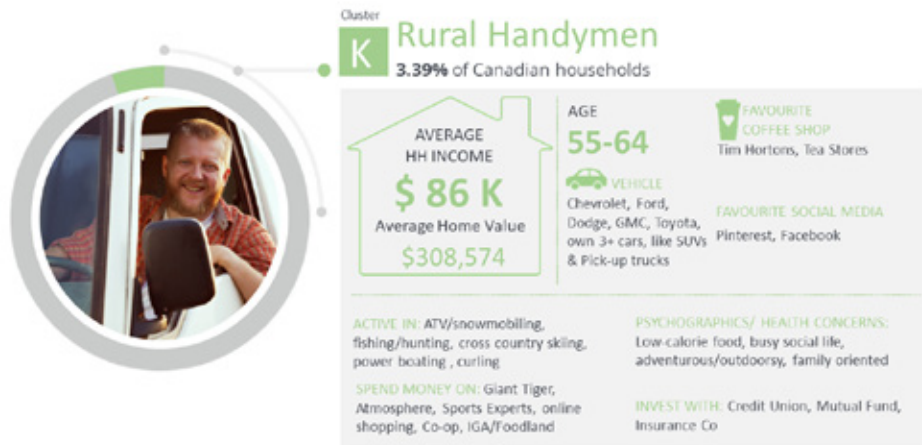
The Trade Area for Ingonish is detailed in **Appendix A** and illustrated in **Figure 2-1**. Estimated for the end of year 2021, the Ingonish Trade Area population is 2,279 with 57% falling within the Rural Handyman lifestyle cluster (**Figure 2-2**). Using the province as a benchmark, the population 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

Figure 2-1. Ingonish Trade Area



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



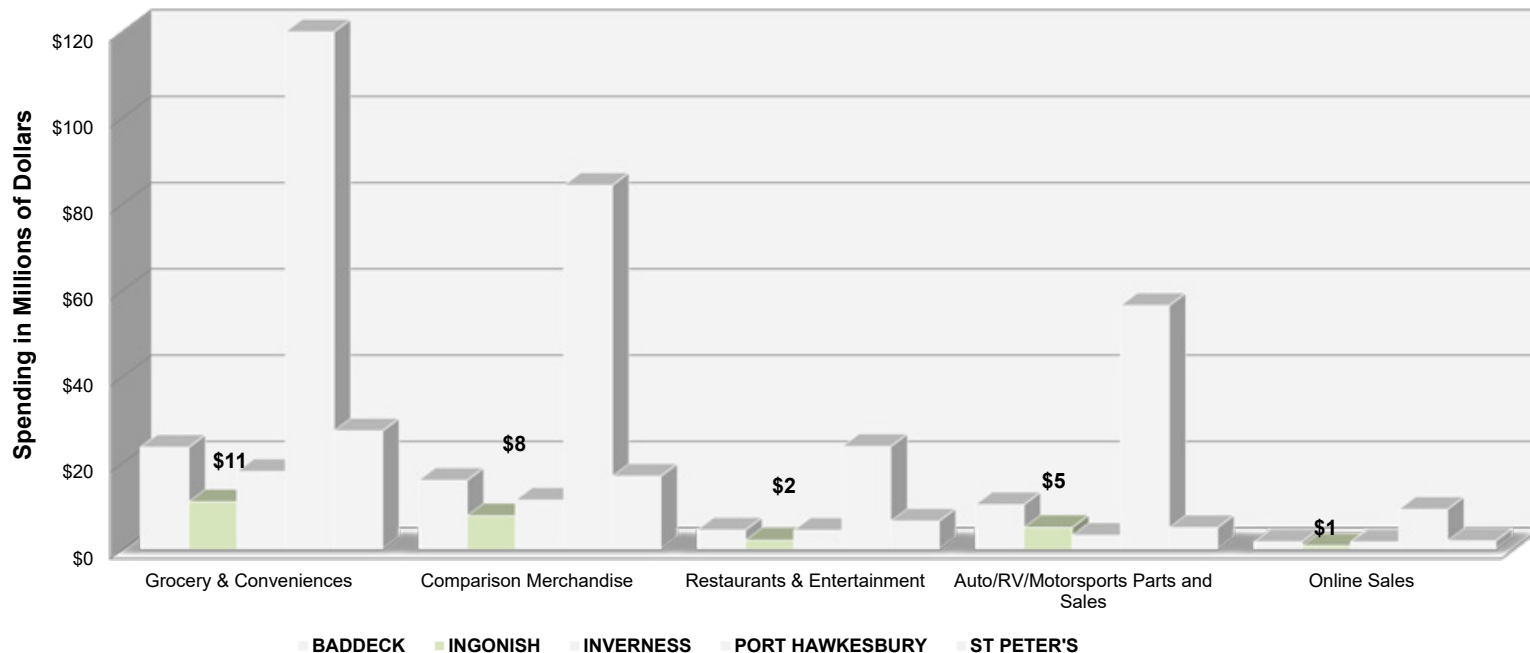
because of Ingonish’s somewhat isolated context, the decline may still transpire, but at slower rates than in the past.

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.

Figure 2-3. Ingonish Trade Area Resident ONLY Retail Spending Summary 2021 Y/E estimate

(Source: Manifold Data Mining Inc. and FBM)



2.3 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 2-3** for the Ingonish Trade Area.

The Ingonish Trade Area spending, as illustrated in **Table 2-1** 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 2-1**, 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.

2.4 Retail Inventory

Retail in Ingonish is primarily located in Ingonish proper (referred to as Ingonish-north in figure **Figure 2-4**) with its Freshmart and Rona, and Ingonish Beach (**Figure 2-5**), 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 2-6**). 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 2-2**). 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.

Table 2-1. 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 2-4. Ingonish North Business Inventory Map (February 2022)



Figure 2-5. Ingonish Beach Business Inventory Map (February 2022)



Table 2-2. 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

2.5 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 2-3** 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 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 Ingonish 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.

Table 2-3. 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%
	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

Per Capita Floorspace Methodology

The second methodology, as shown in **Table 2-3** 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.

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.

Figure 2-6. Ingonish Retail Inventory Images



3.0 Summary

3.1 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.

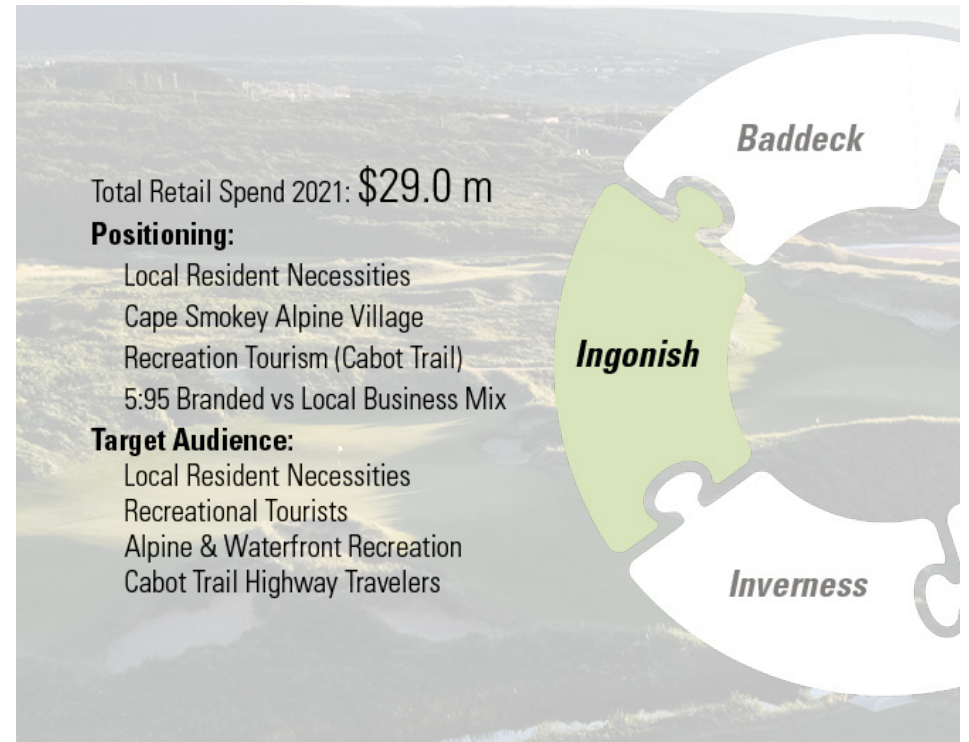
Even though the demand forecast based on current and near term growth dynamics suggests relatively limited demand, a village type development at Cape Smokey in the range of 15,000 sf would be supported by the visitor volume that has historically not stopped in the area. Furthermore, with the recent gondola 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 3-1. Retail Positioning Strategy & Target Markets Summary

(See CB REN Retail Market Analysis for information on the other communities in the study)



Appendix A: Detailed Trade Area Demographics

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

Attribute	Ingonish Trade Area		
	value	percent	index
SUMMARY			
Total population	2,279		
Total population age 15 and over	1,942		
Total number of private households	1,049		
Average number of persons in private households	2.11		97
Total population in private households	2,210		
Total number of census families in private households	670		
Average number of persons per census family	2.77		103
Total population in families	1,860		
Total number of labour force age 15 and over	1,112		
Land area (square km)	323.09		
Inhabited area (square km)	987.82		
POPULATION AGE			
Population age 0-14	336	14.8%	105
Population age 15-24	264	11.6%	103
Population age 25-34	192	8.5%	67
Population age 35-44	234	10.3%	87
Population age 45-54	272	11.9%	95
Population age 55-64	402	17.7%	113
Population age 65+	578	25.4%	114
DWELLING			
Total number of occupied private dwellings	1,049		
Average dwelling value \$	\$299,758		99
Home owners	915	87.2%	128
Home tenants	134	12.8%	41
Band housing	0	0.0%	0
HOUSEHOLDS			
One-family households	706	67.3%	104
Multiple-family households	21	2.0%	155
Non-family households	278	26.5%	78
EDUCATION			
Total population aged 15 years and over by highest certificate, diploma, or degree	1,942		
No certificate, diploma, or degree	660	34.0%	174
High school diploma or equivalent	556	28.6%	112
Post-secondary certificate, diploma, or degree	727	37.4%	68
Apprenticeship or trades certificate or diploma	248	12.8%	131
College, CEGEP or other non-university certificate or diploma	261	13.4%	63
University certificate or diploma below bachelor level	38	2.0%	79
University certificate, diploma, or degree at bachelor level or above	180	9.3%	43
Bachelor's degree	111	5.7%	40

Attribute	Ingonish Trade Area		
	value	percent	index
INCOME			
Average family income \$	\$86,510		79
Average household income \$	\$73,473		83
Average income population age 15 and over (\$)	\$40,789		85
Population with income Under \$10,000 (including loss)	170	8.8%	80
Population with income \$10,000 to \$19,999	298	15.3%	95
Population with income \$20,000 to \$29,999	413	21.3%	141
Population with income \$30,000 to \$39,999	373	19.2%	148
Population with income \$40,000 to \$49,999	223	11.5%	109
Population with income \$50,000 to \$59,999	131	6.7%	85
Population with income \$60,000 to \$69,999	94	4.9%	83
Population with income \$70,000 to \$79,999	65	3.3%	73
Population with income \$80,000 to \$89,999	33	1.7%	47
Population with income \$90,000 to \$99,999	16	0.8%	33
Population with income \$100,000 and over	46	2.4%	41
Population with income \$100,000 to \$149,999	28	1.4%	44
Population with income \$150,000 and over	18	0.9%	36
PROJECTIONS			
Annual population growth in the period: Next 3 years		-0.9%	
Annual household growth in the period: Next 3 years		-0.4%	-44
Annual family growth in the period: Next 3 years		-1.3%	
Annual population growth in the period: Next 5 years		-1.3%	-394
Annual household growth in the period: Next 5 years		-0.6%	-63
Annual family growth in the period: Next 5 years		-1.9%	-531
Annual population growth in the period: 5 to 10 years from current year		-1.5%	-497
Annual household growth in the period: 5 to 10 years from current year		-0.8%	-99
Annual family growth in the period: 5 to 10 years from current year		-2.1%	-612
POPULATION GROWTH			
Current year total population	2,279		
3-Year Projections - Total population	2,177		-1.51%
5-Year Projections - Total population	2,134		-1.31%
10-Year Projections - Total population	1,975		-1.54%
HOUSEHOLD GROWTH			
Current year total number of households	1,049		
3-Year Projections - Total number of households	1,026		
5-Year Projections - Total number of households	1,021		
10-Year Projections - Total number of households	980		
FAMILY GROWTH			
Current year total number of census families	670		
3-Year Projections - Total number of census families	627		
5-Year Projections - Total number of census families	609		
10-Year Projections - Total number of census families	548		
HOUSEHOLD INCOME GROWTH			
Current year average household income	\$73,473		83
3-Year Projections - Average household income	\$79,742		84
5-Year Projections - Average household income	\$89,479		87
10-Year Projections - Average household income	\$110,008		90
POPULATION GROWTH ALTERNATE FORECASTS			
Current year total population	2,279		
3-Year Projections - Total population (modified projection estimates)	2,177		-1.51%
5-Year Projections - Total population (modified projection estimates)	2,134		-1.31%
10-Year Projections - Total population (modified projection estimates)	1,975		-1.54%

Appendix B: Detailed Resident Trade Area Spending

Ingonish, 2021, 2026 & 2031

(Source: Manifold Data Mining Inc. and FBM)

Retail Spending by Merchandise Category	2021		2026		2031	
	INGONISH TRADE AREA Per Household Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INGONISH TRADE AREA Per Household Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending	INGONISH TRADE AREA Per Household Retail Spending	INGONISH TRADE AREA Aggregate Retail Spending
Grocery & Convenience	\$6,719	\$7,047,853	\$7,061	\$7,209,647	\$7,422	\$7,273,127
Pharmacy	\$759	\$796,651	\$798	\$814,939	\$839	\$822,115
Alcohol & Tobacco	\$1,261	\$1,322,419	\$1,325	\$1,352,777	\$1,393	\$1,364,688
Personal Services	\$1,769	\$1,855,410	\$1,859	\$1,898,004	\$1,954	\$1,914,716
Fashion & Accessories	\$1,229	\$1,289,134	\$1,292	\$1,318,728	\$1,357	\$1,330,339
Jewelry	\$86	\$89,721	\$90	\$91,781	\$94	\$92,589
Health & Beauty	\$446	\$467,817	\$469	\$478,557	\$493	\$482,770
Home Furniture & Décor	\$587	\$615,668	\$617	\$629,802	\$648	\$635,347
Appliances & Electronics	\$1,001	\$1,049,764	\$1,052	\$1,073,863	\$1,105	\$1,083,318
Home Improvement & Gardening	\$2,548	\$2,673,007	\$2,678	\$2,734,370	\$2,815	\$2,758,446
Books & Media	\$290	\$303,840	\$304	\$310,815	\$320	\$313,552
Sporting Goods	\$184	\$192,566	\$193	\$196,986	\$203	\$198,721
Toys & Hobbies	\$225	\$236,323	\$237	\$241,748	\$249	\$243,877
Specialty Retail	\$827	\$867,699	\$869	\$887,619	\$914	\$895,434
Quick Service F&B	\$566	\$594,084	\$595	\$607,722	\$626	\$613,073
Restaurants & Pubs	\$1,125	\$1,179,948	\$1,182	\$1,207,035	\$1,243	\$1,217,663
Arts & Entertainment	\$63	\$66,405	\$67	\$67,929	\$70	\$68,527
Fitness & Leisure	\$226	\$236,877	\$237	\$242,315	\$249	\$244,448
Auto Parts & Accessories	\$1,784	\$1,871,226	\$1,875	\$1,914,183	\$1,970	\$1,931,037
Auto/RV/Motorsports Dealership	\$3,049	\$3,198,614	\$3,205	\$3,272,043	\$3,368	\$3,300,853
TOTAL CATEGORIES	\$24,743	\$25,955,027	\$26,005	\$26,550,861	\$27,331	\$26,784,640
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	\$19,910	\$20,885,187	\$20,925	\$21,364,636	\$21,993	\$21,552,751
TOTAL Online Sales	\$797	\$836,120	\$838	\$855,314	\$880	\$862,845

Appendix C: Detailed Visitor Spending

Ingonish, 2021, 2026 & 2031

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

Retail Spending by Merchandise Category	2021		2026		2031	
	INGONISH Visitor Spending	INGONISH Aggregate Visitor Retail Spending	INGONISH Visitor Spending	INGONISH Aggregate Visitor Retail Spending	INGONISH Visitor Spending	INGONISH Aggregate Visitor Retail Spending
Grocery & Convenience	\$1.0	\$150,000	\$1.1	\$178,499	\$1.1	\$202,103
Pharmacy	\$0.2	\$30,000	\$0.2	\$35,700	\$0.2	\$40,421
Alcohol & Tobacco	\$0.6	\$90,000	\$0.6	\$107,099	\$0.7	\$121,262
Personal Services	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Fashion & Accessories	\$1.2	\$180,000	\$1.3	\$214,199	\$1.3	\$242,523
Jewelry	\$0.2	\$30,000	\$0.2	\$35,700	\$0.2	\$40,421
Health & Beauty	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Furniture & Décor	\$0.2	\$30,000	\$0.2	\$35,700	\$0.2	\$40,421
Appliances & Electronics	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Home Improvement & Gardening	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Books & Media	\$0.2	\$30,000	\$0.2	\$35,700	\$0.2	\$40,421
Sporting Goods	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
Toys & Hobbies	\$0.4	\$60,000	\$0.4	\$71,400	\$0.4	\$80,841
Specialty Retail	\$1.0	\$150,000	\$1.1	\$178,499	\$1.1	\$202,103
Quick Service F&B	\$2.8	\$420,000	\$2.9	\$499,797	\$3.1	\$565,888
Restaurants & Pubs	\$6.0	\$900,000	\$6.3	\$1,070,993	\$6.6	\$1,212,617
Arts & Entertainment	\$1.8	\$270,000	\$1.9	\$321,298	\$2.0	\$363,785
Fitness & Leisure	\$0.2	\$30,000	\$0.2	\$35,700	\$0.2	\$40,421
Auto Parts & Accessories & Fuel	\$4.2	\$630,000	\$4.4	\$749,695	\$4.6	\$848,832
Auto/RV/Motorsports Dealership	\$0.0	\$0	\$0.0	\$0	\$0.0	\$0
TOTAL CATEGORIES	\$20	\$3,000,000	\$21.0	\$3,569,975	\$22.1	\$4,042,056

Appendix D: Ingonish Detailed Retail Inventory

NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE CATEGORY	TENANT NAME	BUSINESS ADDRESS	STREET NAME	SIZE (SF)	COMMUNITY
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
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	Glenghorn 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 Accomodations			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

