



Commercial Gap Analysis Township of North Glengarry

For the communities of Alexandria and Maxville

June 2022

FBM
architecture
interior design
planning

Deloitte.

**NORTH
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Land Acknowledgment

FBM would like to respectfully acknowledge that the area known as United Counties of Stormont, Dundas and Glengarry is the traditional territory of Audenosaunee (Iroquois), Mohawk, Haudenosaunee (St Lawrence Iroquois), and Huron-Wendat. This territory is covered by the Upper Canada Treaties. We are all treaty people.

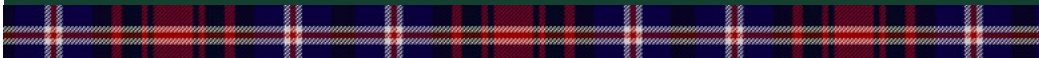


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Preface

Fowler Bauld & Mitchell Ltd. ("FBM") and MDB Insight Inc. ("MDB") was commissioned by the Township of North Glengarry to conduct a Commercial Gap Analysis for the communities of Alexandria and Maxville. In addition to the core analysis by FBM, an online Consumer Survey was also conducted by Deloitte (formerly MDB Insight), as a sub-consultant to FBM. **Note: MDB Insight Inc. was acquired by Deloitte LLP on April 18, 2022.**

The study was carried out over the period of January through May 2022. On-the-ground fieldwork in the study communities was carried out in February 2022.

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.

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 the Township of North Glengarry.

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 Township of North Glengarry or FBM.

FBM, 2022

ACCESSIBILITY TEXT

This document contains a number of tables and figures that contain small text. To enable accessibility, we have also provided larger font copies of applicable tables and figures in **Appendix A**.

For easy identification and navigation, the following symbol is noted beside applicable figures and tables. For those viewing the digital version of this document, you may click on the icon to bring you to **Appendix A** so that you may view the appropriate Figure/Table. Click the icon again to return to the main report text.



HOW TO READ THIS DOCUMENT

This document represents a technical analysis and therefore there may be certain aspects that may not be intuitive to the general public.

This report is structured overall so that the background framework and an understanding of the area from which the retail users originate is presented first. The origin of consumers is synonymous with the term "retail trade area", which is used frequently in this report. A retail trade area is the geographic area from which a retail store draws and is often the longest drive a customer is willing to make. However, people will travel different distances for different types of products. There are some types of products that consumers will drive farther to get. For instance, below is another way to differentiate trade areas:

Local convenience trade areas, which are areas defined by ease of access, travel time, and distance. For example, with few exceptions, people will stay within a certain area for things like gas and groceries.

Comparison shopping trade areas, in which people will venture further out for items with large price tags or when they want to compare price, style, or quality. Items like furniture and appliances fall into this category.

As the reader progresses through report, they will notice that expenditure tables, also known as spending, are not sorted alphabetically. Rather, we have sorted these categories to correspond more accurately with the nature of broad spending categories. This is visually shown and colour-coded for ease of understanding in **Figure P-1**.

Figure P-1. Retail Merchandise Category Sorting Breakdown



GLOSSARY OF TERMS & ACRONYMS

Throughout this document, various acronyms and retail industry terminology have been used. For advance clarity, these are defined below.

ACRONYMS:

ADT - Average Daily Traffic
CRU - Common Retail Unit
DSTM - Department Store Type Merchandise
F&B - Food & Beverage
ICSC - International Council of Shopping Centers
PTA - Primary Trade Area
STA - Secondary Trade Area
F&B - Food & Beverage

INDUSTRY & CATEGORY TERMINOLOGY

sf - square feet
psf - per square foot

\$ psf - dollars per square foot (an industry standard measure of annualized retail sales productivity)

Comparison Merchandise - Comparison Merchandise is an industry term often synonymous with Department Store Type Merchandise (DSTM) and includes categories such as Fashion, Home Decor, Appliances and Electronics, Sporting Goods etc or categories that are typically found in more traditional “mall” or shopping centre environments.

Quick Service F&B - This represents typically fast food, grab-and-go, or drive through types of restaurants, such as Tim Hortons etc, or other cafe/ coffee shops.

Full Service F&B - This represents restaurant or pubs that included table service seating or servers for meals and beverages.

Specialty Retail - This category of retail typically is a “catch-all” for a wide range of store types such as pet foods, arts & crafts, cellular phones, office supplies/ stationery etc.

General Merchandise - This category of retail typically represents stores like Walmart, Giant Tiger, Canadian Tire and Dollarama as they carry multiple product types across an array of categories. Similarly, Shoppers Drug Mart and Jean Coutu also offer much more than pharmacy. For the purposes of this study, the floorspace of these particular stores that have a presence in North Glengarry have been broken down into the respective spending categories to allow for a more accurate inventory representation.

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 (**Figure P-2**) are the dominant CanaCode Lifestyle Clusters that prevail in the Township of North Glengarry. Dominant lifestyles in Alexandria and Maxville are summarized in the respective demographic sections of this document.

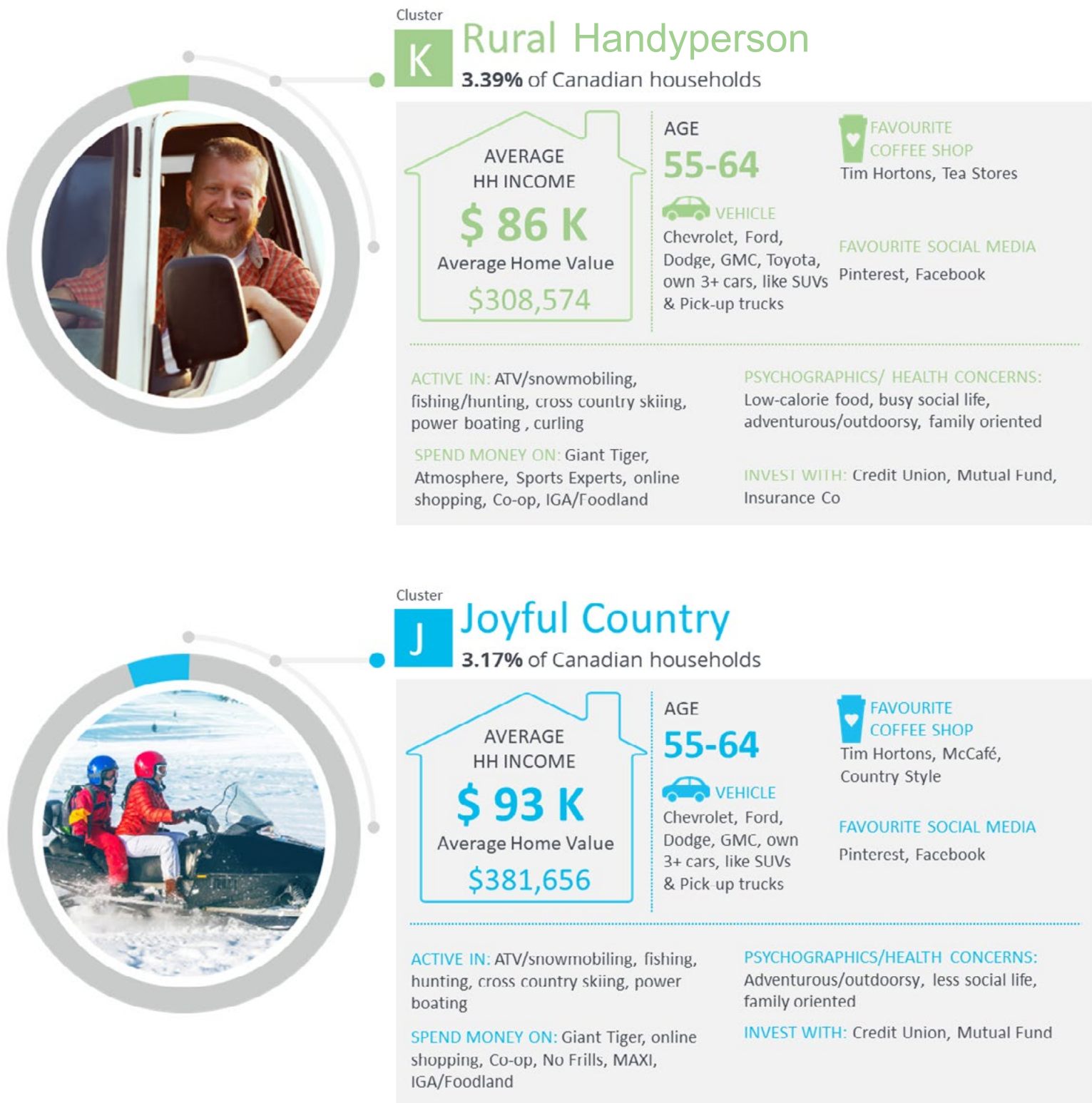
A full listing of the CanaCode Lifestyle Clusters can be viewed at www.polarisintelligence.com/canacode/

1.4 Demographic Benchmarking

When viewing the Demographic Tables in Section 3 of this report, the reader will notice that values are benchmarked or indexed against the Province of Ontario Average. The colour coding used for this benchmarking index is as shown below:

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	

Figure P-2. Dominant CanaCode Lifestyles in North Glengarry



Executive Summary

Regional & Local Context Summary

The Township of North Glengarry is a part of the United Counties of Stormont, Dundas and Glengarry ('County') in Eastern Ontario. The City of Cornwall is the primary commercial centre for the County, and Alexandria and Maxville serve North Glengarry as local commercial hubs with established Main Streets. Alexandria is located approximately an hour away from both Ottawa to the northwest and Montreal to the northeast.

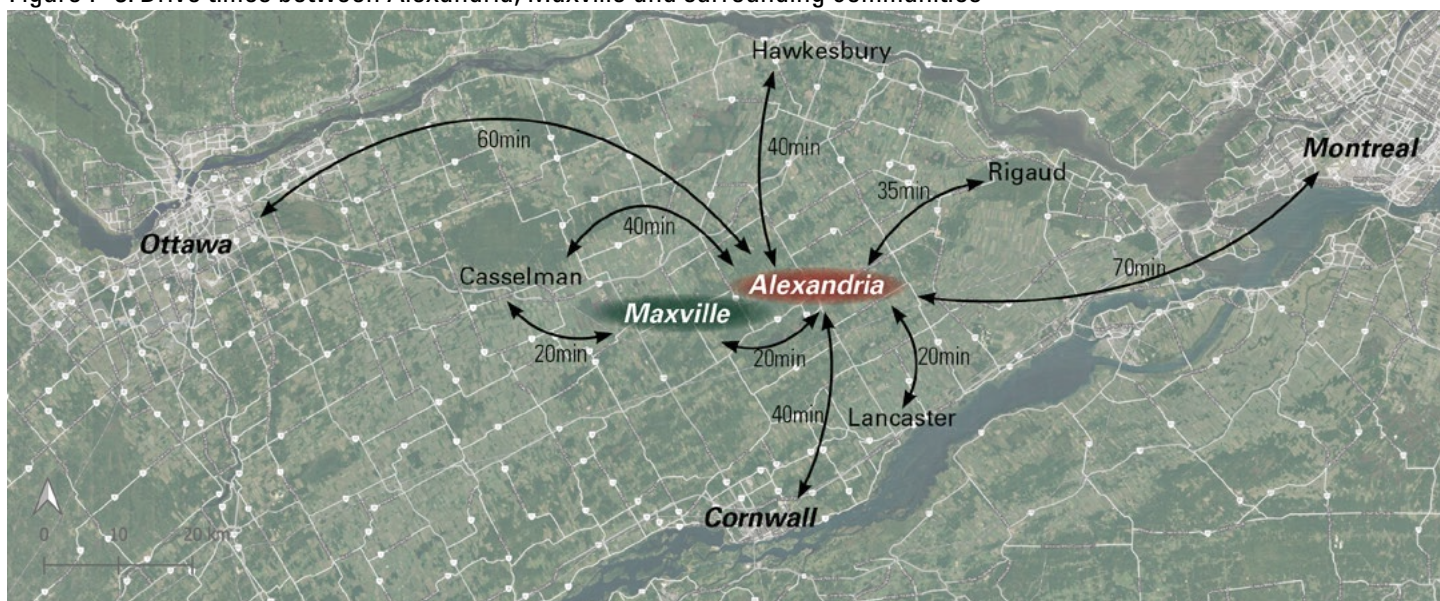
Alexandria is a regional node for health care with the Glengarry Memorial Hospital and a concentration of supporting medical services. Educational facilities include French and English public elementary schools, an English public high school, and French Catholic elementary and high schools.

Alexandria and Maxville are separated by a 20 minute country drive (**Figure P-3**), and are both located along the CN Rail Line. VIA Rail provides passenger train service on between Ottawa and Montreal along this high frequency rail corridor with an unstaffed stop in Alexandria.

Trade Area Summary

For this particular study, Retail Trade Areas are delineated utilizing a combination of drive times and competitive forces including the similar sized nearby communities of Casselman, Hawkesbury, Rigaud, and Lancaster. Alexandria's trade area (**Figure P-4**) is oriented towards the northeast and encompasses residents within a 20-40 minute drive time.

Figure P-3. Drive times between Alexandria, Maxville and surrounding communities



Maxville as a smaller retail market garters a notably smaller Trade Area, attracting residents within approximately a 15 minute drive time.

Alexandria

Estimated for the end of year 2021, Alexandria's Trade Area population is 15,166. However, while some forecasts suggest a decline of population these past population forecasts may not accurately depict the future reality of growth in North Glengarry and in particular Alexandria, which will increasingly benefit from its location relative to Ottawa and Toronto as well as being a stop on the High Frequency Rail Corridor. Recent development proposals also provide cues for future growth prospects, which were not evident in past forecasts.

Maxville

Estimated for the end of year 2021, Maxville's Trade Area population is very local at 1,982. Like Alexandria, new market realities are though suggesting that population growth could buck past negative growth trends in favour of positive growth forecasts.

Secondary Trade Area

It is important to acknowledge that the area east of Alexandria's core Trade Area extends to include the community of Rigaud and accounts for an additional 10,600 residents. From a population Trade Area perspective, by including Rigaud as part of a Secondary Trade Area, the total Alexandria market could reach a critical threshold of 25,000 residents; an important benchmark for new-to-market retailers.

Alexandria Population Forecast Scenario

Although there are no current growth forecasts available to suggest otherwise, this study does attempt to provide some rational growth scenarios that take into account notable new development proposals as well as the arrival of municipal water services to Maxville.

These positive directions, combined with the introduction of the High Frequency Rail corridor which has a stop in Alexandria, as well new trends for remote work and millennials' seeking out less urban locations for establishing families all point to more rational thinking for population growth forecasts, not previously considered in Statistics Canada forecast models.

Applying growth rates for Alexandria ranging from 0.25% per year (Low) to 0.5% per year (Moderate), to 1.0% per year (High) suggest that Alexandria's Trade Area could grow by as much as 1,700 new residents over the next decade.

Using a similar approach for Maxville, but applying annual rates of 0.1%, 0.3% and 0.5% yields a future growth of almost 100 residents over the next decade.

On the surface, these may not seem like robust growth rates, but they are a divergence from historic patterns of decline and could be realistically met or even exceeded given the many attributes that North Glengarry has at its doorstep.

Figure P-4. Alexandria & Maxville Retail Trade Area Map



Trade Area Spending Summary

Alexandria

Alexandria’s Trade Area spending is estimated at \$167 million (2021 year-end estimate). If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Alexandria’s Trade Area is \$130 million.

By 2031, the Alexandria Trade Area spending potential could increase by \$20 million to \$150 million, excluding Health Care and Auto categories.

Maxville

Maxville’s more localized Trade Area spending is estimated at \$31million (2021 year-end estimate). If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Maxville’s Trade Area is \$24 million.

Grocery & Convenience spending by local Maxville residents is approximately \$11 million, which is almost all leaving the community for Alexandria. A reasonable amount could be retained with a small grocery component in Maxville.

By 2031, the Maxville Trade Area spending potential could increase by \$5 million to \$29 million, excluding Health Care and Auto categories.

Secondary Trade Area (STA)

The STA comprising largely of the Rigaud area represents a further \$106 million retail market (excluding Health Care and Auto categories). It would be reasonable that Alexandria could tap into some of this market, though it would be expected to be less frequent than the existing Alexandria Trade Area.

By 2031, the Secondary Trade Area spending potential could increase by \$24 million to \$130 million, excluding Health Care and Auto categories.

Retail Inventory Summary

The combined Alexandria and Maxville inventory illustrates a total commercial floorspace of 599,504 sf. This latter floorspace includes Professional & Financial Services and Medical & Wellness Services. When excluding the latter, the floorspace combined equates to 412,967 sf. If further removing automotive categories, the “retail only” inventory equates to 347,742 sf.

The Top 5 retail categories (excluding Professional & Financial Services and Auto) in terms of overall retail floor space are:

1. Grocery & Specialty Foods	81,455 sf
2. Home Improvement & Garden	73,288 sf
3. Full Service Restaurants	24,938 sf
4. Specialty Retail	23,862 sf
5. Limited Service F&B	20,462 sf

Alexandria has a limited retail offering within the Comparison or Department Store Type Merchandise Categories (DSTM), which could set the stage for a format such as Walmart and/or Marks (a subsidiary of Canadian Tire), which is among the reasons shoppers currently shop in Cornwall, or why residents in the Secondary Trade Area shop in Hawkesbury, when Alexandria would be just as, if not more convenient.

While there may be opportunities to strategically add to this inventory or worth pursuing in certain circumstances, it is important that they be located at sites that are compatible and beneficial to the community as a whole and the downtown specifically, and where lands are available, such as in the south part of the community.

The current overall vacancy rate is estimated at 5.3% which is in line with what is traditionally considered as healthy for retail vacancy (4% - 5%).

The current clusters of vacancies are located in Alexandria’s downtown and average in the range of 1,500 to 2,500 sf. Aside from downtown, the southern area of Alexandria with more traditional retail continues to perform at a healthy level, with the only vacancies located in tucked away, or less than prime retail, thus likely opportunities for local businesses, who may be looking for less expensive spaces.

Maxville’s vacancy is very low, which is a key to setting the stage for new infill development to accommodate new locally-serving independent retailers

In looking to manage vacancies, and as the community prepares for growth, any new development should be very targeted for uses that have the ability to create benefit for the greater community good rather than impacting existing businesses.

As noted, retail opportunities exist for new-to-market tenants, but these spaces don’t currently exist, as they are predominantly going to be larger, or have specific needs such as pad sites or drive through capability, with surface parking. As it has been through the CIP program, Alexandria and Maxville’s main street areas should continue to be a marketing priority for attracting local businesses as well as finding opportunities for small infill development along Main Street.

Consumer Survey Summary

As a supplemental part of this Commercial Gap Analysis, a survey was conducted by Deloitte (formerly MDB Insight). The purpose of this survey was to obtain feedback from community members from within North Glengarry as well as from the surrounding areas.

The following provides a summary of the key findings from the survey.

- Residents of North Glengarry tended to use retailers in Alexandria frequently for their day-to-day conveniences. Retailers in Maxville were used less frequently.
- Residents of North Glengarry often shopped for bigger-ticket items in Cornwall or Ottawa. Over three quarters of residents were willing to travel more than 30 km for these bigger ticket items.
- Non-residents respondents, many of whom lived in Stormont, Dundas, and South Glengarry visited Alexandria often for their day-to-day conveniences.
- Clothing/footwear, grocery/specialty foods, house/home décor, and arts/entertainment were some of the commonly-mentioned shops or services that respondents felt were missing from North Glengarry.
- Some of the main issues preventing the respondents from using shops and services in North Glengarry included: Missing specific retailers/merchandise, and cost of good or services.

Retail Demand Summary

With this understanding of the retail market dynamic and population growth and the results of the consumer survey, the key to forecasting new floorspace demand must look at the notion of achieving a greater market share of the existing spending for categories that represent strength today.

North Glengarry's residents currently garner just over half of the available Trade Area spending (52.7%). This means that almost 47% of the resident Trade Area spending is spent outside of the community.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing 59% of the Trade Area spending, where in reality this figure should be more in the range of 70%.

Not unexpectedly, Fashion & Accessories (including Footwear) exhibit low retention of spending at only 35%. Much of this spending is drawn to Ottawa or Cornwall. Books & Media and Appliances and Electronics also have low patterns of retention. While some of this is drawn to Ottawa and Cornwall, the role of online retail sales is significant in these categories, as it is for Home Furniture & Decor, which is also a low spending retention category.

The best way for a community like Alexandria to capture more of this spending would likely be through the introduction of a General Merchandise retailer like a Walmart or Real Canadian Superstore, which tends to carry all of these product offerings. Similarly, any smaller retailer would be well-advised to ensure as broad an offering as possible at a value price point to ensure concept marketability, if not occupying a larger store size.

This report recommends that the best direction for Alexandria's retail opportunity lies in incrementally and slowly increasing the overall market share of sales, realizing that Cornwall and Ottawa and to a lesser extent Montreal will still continue to be notable factors in attracting spending in the Department Store Type Merchandise (DSTM) categories.

If market shares were to increase by 5%, the total demand by the year 2031, without new population growth, but with spending growth and increased retention could result in incremental new space of approximately 152,613 sf. Based on this level of demand, it would be reasonable to allocate a need for 12 to 15 acres of potential land, assuming that upwards of 130,000 sf or more of the new floorspace would be occupied in new development.

Part of the overall demand in Alexandria and Maxville is not solely premised on providing new retail space since the current vacancies in the main street areas should be addressed as there are some well-positioned assets available for tenancies.

Realizing that Alexandria's main street currently has the majority of vacant retail spaces, an important aspect of the overall messaging is that retail demand is not simply predicated on adding new space, but specifically targeting new businesses that have the capacity to succeed while not creating a negative impact on existing local businesses. Attracting independent retailers to infill opportunities along main street will be key for both communities.

Figure P-5. Future Retail Demand Summary 2021 to 2031 by Major Spending Categories (Based on Increasing Market Shares)

(Source: FBM & Manifold Data Mining Inc)

Retail Merchandise Category	2021	2026	2031	Current City Retail Inventory (sf)	Total Future NEW Demand (sf)
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)		
Convenience & Day-to-Day Goods/Services	127,198	16,551	34,636	127,198	34,636
Comparison or Department Store Type Merchandise (DSTM)	159,105	20,705	43,329	159,105	43,329
Leisure, Recreation & Entertainment Goods/Services	55,223	-2,918	3,664	55,223	3,664
Automotive Goods (excluding repair)	95,074	52,421	70,984	95,074	70,984
Total (sf)	436,601	86,758	152,613	436,601	152,613

Future Allocation Of Demand To Year 2031

The demand figures shown in **Figure P-6** provide guidance for retail growth in Alexandria and Maxville over the next 10 years, with an eye to how future development could or should proceed over the longer term and as planning and economic development strategies evolve. Based on existing and future market share scenarios, retail demand is anticipated to be 100,000 to 150,000 sf for Alexandria, and 20,000 to 30,000 sf for Maxville. Continuing to concentrate commercial development in established nodes has multiple benefits, including supporting existing businesses, maximizing existing municipal infrastructure and reducing vehicle trips between stores. Alexandria's south highway commercial node is poised to absorb the majority of demand through infill and greenfill development. The Main Street commercial nodes in Alexandria and Maxville will continue to play a key role in the commercial mix primarily through strategic infill and redevelopment.

As mentioned previously, demand in this analysis is based on market driven parameters, but economic development factors driven by internal and external investment attraction have the proven ability to increase figures.

Action Plan Summary

In retail, sometimes competition is necessary to ensure that spending is retained in the community and in many cases a new competitor can actually increase the overall spending. In the case of Alexandria, the current market share rate of 53% is low and suggests an opportunity to increase to almost 60%. Doing so benefits existing retailers, as well as creating a base for new retailers to enter the market.

Alexandria would be in a position to support larger tenant opportunities like Walmart, Bulk Barn and Marks, though there would likely be an impact on specific downtown retailers. This is cautionary note that speaks to ensuring that if such tenants are pursued, that they should be located as close to the existing core cluster of compatible retail in the south node rather than in a larger development at the northern side of town. The north area of Alexandria would be appropriate for a small-scale development of 10,000 to 15,000 sf, but any larger development in this area would run the risk of creating an unnecessary third node, that would further splinter the retail market.

Figure P-6. Future Allocation of Demand to year 2031

Retail Node	Total 10-yr New Demand by 2031 with CURRENT Market Share (sf / acres)		Alexandria				Maxville			
			% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
Total	97,833	6.4	80%	78,267	0.32	5.5	20%	19,567	0.50	0.9
Main Street Commercial			15%	14,675	0.5	0.7	20%	19,567	0.5	0.9
South Highway Commercial			55%	53,808	0.3	4.1				
North Highway Commercial			10%	9,783	0.3	0.7				

Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		Alexandria				Maxville			
			% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
Total	152,613	10.0	80%	122,090	0.32	8.6	20%	30,523	0.50	1.4
Main Street Commercial			15%	22,892	0.5	1.1	20%	30,523	0.5	1.4
South Highway Commercial			55%	83,937	0.3	6.4				
North Highway Commercial			10%	15,261	0.3	1.2				

Alexandria would be better served by promoting compact and clustered commercial growth. Future land needs at approximately 15 acres is a near term planning window, but longer term, the Township should look to ensure future land allocation is appropriately identified and sized to accommodate growth that may very well exceed the conservative forecasts presented in this study.

Though Alexandria may be the centre of commercial activity and larger growth prospects, Maxville is poised to strengthen its local offering through strategic main street redevelopments that could create new retail opportunities. If spaces in the range of 1,000 to 1,500 sf are created, then either individually, or if combined, could create the necessary spaces for missing conveniences and day-to-day items like a butcher, bakery or small grocery. In addition to small infill properties along Maxville's main street, the Township should also consider allocating through zoning approximately 5 acres for future neighbourhood-scale commercial development. This long-term plan would be adjacent to main street and would serve to bolster Maxville's commercial offering in the future.

Since forecasts in this study are yielding conservative estimates for floorspace and land, any growth planning exercise should consider a longer-term need for future commercial land with a preference for locating the majority of this land in the south, with a smaller allocation in the north. While conservative demand suggest demand in 10 years for approximately 15 acres, when thinking over the next 25 years, the Township should be looking to create commercial land opportunities in the range

of 30 acres in order to ensure full capacity and responsiveness for potential commercial investment. New demand will require concerted effort at allocating appropriately sized and serviced land in areas most beneficial, such as south for larger node and north for smaller node.

Because of the higher levels of vacancies in Alexandria's downtown, the Township and Chambers of Commerce should work with landlords in downtown to actively promote and utilize vacant spaces, as they have started to do with the Community Market weekend pop-up. The goal should be to create daily activation of available spaces by looking at ways to create rotating "main street pop-ups".

As a smaller local market Maxville's retail demand is predicated on promoting higher value redevelopment/ infill projects along main street. There are properties on Maxville's Main Street that currently have limited prospects for leasing due to the poor quality of the spaces and the buildings themselves. They could however undertake redevelopments similar to that which Home Hardware recently completed, and provide quality spaces that could be more conducive to attracting grocer/deli or bakery/cafe type concepts.

Also, as Maxville garners more interest for new residential development, any new commercial development should be encouraged in and around the existing main street area so as to ensure a compact critical mass of businesses in a walkable, pedestrian-friendly streetscape.

Smaller communities and those with essential downtowns or main streets, must continue to cultivate an environment in which local independent stores can succeed. Independent stores contribute to community vitality with unique offerings and experiences, and often have more flexibility to adapt to changing environments compared with larger businesses. In both Maxville and Alexandria, the following independent store types could be considered as compatible with the demographic profiles and anticipated development.

Independent Store Types

- » Recycled/Upcycled Fashions
- » Urban Cidery/Cider House
- » Delicatessen/Butcher
- » Specialty Beef Jerky/Hot Sauces
- » Community Food Coop-Deli
- » Community Kitchen
- » Co-working office/café
- » Ethnic fare (Filipino, Indian etc)

Branded or franchise tenants that are also considered compatible with the demographics, spending characteristics and location include the following, which are presented as either near term opportunities (<5 years) or longer term opportunities (>5 years):

Short Term (<5 yrs)

- » Full service restaurant (2,000 sf to 5,000 sf)
- » Quick service restaurant
- » Unisex clothing store
- » Home improvement store
- » Specialty food stores (e.g. Bulk food, specialty meats, bakery, cafe)
- » Sporting good and hobby stores
- » Discount/ general merchandise store

In the case of a retailer like Bulk Barn or M&M Meats, an ideal location would be located next to the Independent Grocer where a vacant commercial land parcel exists.

This land could accommodate an approximate 10,000 sf retail building capable of housing a 5,000 sf Bulk Barn along with two to three other smaller retail units, all within the existing critical mass of retail.

In the future, as the community grows, even a retailer like Canadian Tire may outgrow its current format size and look for new land in which to build a larger store with a possible co-owned tenant Marks. The backfilling of the Canadian Tire could open an opportunity for a 20,000 sf grocery who would benefit from the proximity to the existing Independent Grocer. Retail can often including a shifting of pieces, but this can only be possible if the land is available.

Longer Term (>5 yrs)

- » Medium to large general merchandise/ department store (e.g. fashion apparel, housewares, toys)
- » Medium to large grocery store
- » For-profit second-hand clothing retailer

Additionally, there are opportunities to cultivate local independent store types that would be equipped to fit within the downtown as either pop-up incubators or full-time tenants.

Alexandria and Maxville may not exhibit significant demand forecasts, but with strategic messaging, collaborations and awareness, the community can retain and attract business opportunities capable of utilizing existing vacancies, or new land for the betterment of the community.

Summary

The following is a summary of suggested action items for the Township of North Glengarry based on the report findings. Each action notes the community area it pertains to and when the action could be started. This is meant to guide further internal discussion around priorities and collaboration opportunities.

	Area(s)	Now <1yr	Next 1-5yr	Ongoing
Enable Supportive Policy and Concentrate Development in Established Commercial Nodes				
» Submit data to the United Counties for review as part of the Growth Study for the Official Plan.	Both	X		
» Identify properties that could be included in the urban boundary to enable development within the southern commercial node.	Alexandria	X		
» Identify servicing requirements for properties that could be added to the urban boundary.	Both	X		
» Consider allocating approximately 5 ac for future longer-term, neighbourhood-scale and main street adjacent commercial	Maxville		X	
» Continue encouraging commercial facade improvements through the Community Improvement Plan in Maxville and Alexandria.	Both			X
Increase Market Share and Businesses Supports				
» Strategically target developments that have the ability to benefit the greater community rather than impacting existing businesses.	Both			X
» Prioritize Alexandria's downtown area and Maxville's main street for business attraction and small infill development	Both			X
» Cultivate local independent store types on Alexandria and Maxville's Main Streets.	Both			X
» Encourage a small grocery retailer in Maxville.	Maxville	X		
» Support new retail opportunities in the range of 1,000- 1,500 sf concentrated in and around Maxville's Main Street.	Maxville		X	
» Encourage redevelopment of underused properties in Maxville (e.g. recent Home Hardware development).	Maxville		X	
» Collaborate with the Chambers of Commerce and downtown landlords to actively promote and utilize vacant spaces with the goal of activating the spaces.	Both			X
» Engage with local and regional commercial real estate agencies to proactively share the market opportunities	Both	X		
Attract Visitors and Residents				
» Promote passenger rail connectivity to attract residents and workers	Alexandria	X		
» Market Alexandria's offerings within its trade area and towards Rigaud (secondary trade area) to capture more visitor spending	Alexandria			X
» Attract residents to Maxville through workforce opportunities (e.g. Ford parts distribution plant in Casselman)	Maxville		X	
» Explore collaboration opportunities with VIA Rail to encourage rail users to visit Main Street through gateway and directional signage.	Alexandria		X	

1.0 Introduction

1.1 Rationale

The Township of North Glengarry commissioned Fowler Bauld & Mitchell Ltd. ("FBM") and Deloitte LPP ("Deloitte") (formerly MDB Insight Inc) to conduct a Commercial Gap Analysis to guide development and economic priorities for the municipality. The Township understands the importance of having a balanced mix of retail and service businesses for a healthy and thriving community. A balanced business mix indicates growth and prosperity, and attracts and retains new residents and visitors, and in turn makes the Township more appealing to those seeking investment and business opportunities. The Commercial Gap Analysis' results identify areas of retail strength and weakness and specific business opportunities that the municipality should target to increase economic growth and sustainability in the villages of Alexandria and Maxville.

For the Township to be well positioned to welcome an expanding demand for commercial/retail space, the information in the analysis will also be used to:

- » Provide supporting data for to the Growth Study for the SDG Official Plan;
- » Guide expansion requirements for lands that should be targeted for inclusion within the villages' urban boundaries;
- » Supply data for the North Glengarry Development Charges Study; and
- » Identify areas of possible changes to the Township's Zoning By-law.

The study was carried out over the period of January through May 2022. On-the-ground fieldwork in the study communities was carried out in February 2022.

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 North Glengarry, Alexandria and Maxville in terms of geographic location, regional access and traffic counts, including relevant plans, studies and initiatives.

Section 3 - Trends and Case Studies: Provides an overview of retail and commercial trends that are shaping consumer, tenant and investor sentiment and actions. Includes case studies of comparably sized communities.

Section 4 - Trade Area: Identifies and defines Alexandria and Maxville's Retail Trade Area and demographics including retail spending.

Section 5 - Commercial Supply: Provides a detailed documentation, tabulation and summary of Alexandria and Maxville's predominantly ground oriented retail and commercial business mix. This section also assesses the location and characteristics of Alexandria's current nodes of retail activity ("supply"), including developing or future planned retail sites. Fieldwork assessments included identifying and documenting in detail Alexandria and Maxville's retail inventory by retailer, merchandise category and NAICS industry classification.

Section 6 - Resident and Consumer Survey: Introduces and analyzes the results of the resident and consumer survey for Alexandria and Maxville.

Section 7 - Market Demand Assessment: Based on an extensive assessment of the current "supply" and Trade Area spending, the current demand is then estimated and measured against the market potential. Quantifies future retail demand over the next 10 years.

Section 8 - Key Findings and Recommendations

Synthesizes gaps and opportunities for the retail and commercial market, and identifies strategic action steps ranging from now to short term and medium term that could be undertaken to strengthen existing businesses, while cultivating new businesses and investment activity.

2.0 Regional and Local Context

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 North Glengarry, Alexandria, and Maxville as they relate to the attraction and retention of retail businesses and merchandise categories.

2.2 Regional and Local Context

The Township of North Glengarry is a part of the United Counties of Stormont, Dundas and Glengarry ('County') in Eastern Ontario (**Figure 2-1**). The City of Cornwall is the primary commercial centre for the County, and Alexandria and Maxville serve North Glengarry as local commercial hubs with established Main Streets. Alexandria is located approximately an hour away from both Ottawa to the northwest and Montreal to the northeast.

Alexandria is a regional node for health care with the Glengarry Memorial Hospital and a concentration of supporting medical services. Educational facilities include French and English public elementary schools, an English public high school, and French Catholic elementary and high schools.

Maxville also has a public elementary school and is home to the Glengarry Highland Games. The Township of North Glengarry, in collaboration with the Township of South Glengarry, is known as Ontario's Celtic Heartland in celebration of local Scottish ancestry. The Highland Games have been a national draw for over 70 years with a variety of events in Piping, Heavyweights, Dancing and Fiddling. Recognized as one of Ontario's Top 100 Festivals, the Games draw thousands of visitors. The Games are scheduled to return July 29-30 2022 after two years of COVID cancellations.

Figure 2-1. Municipalities within the United Counties of Stormont, Dundas and Glengarry

Emphasis added to Alexandria and Maxville.

(Source: United Counties of Stormont, Dundas and Glengarry)



Growth and Development

Development in Alexandria has been limited over the past 30 years due a growth freeze related to wastewater processing (lagoon) capacity. Recent efforts by the Township of North Glengarry to increase capacity were met with success in April 2021 when plans to upgrade the lagoon over the next five years were announced. This resulted in the lifting of the building freeze which has enabled staff to allow connections to Alexandria's waste water collection system. This bodes well for new development in the region, including the Glengarry Seniors Village (north of County Rd 43) which is proposed to have 15,000-25,000 sf of supporting commercial space.

Similar to Alexandria, development in Maxville has been limited by supporting infrastructure, namely access to potable water. Following many years of planning and lobbying, the Township completed the Maxville Water Project in 2020 with upgrades to the water plant, the construction of a new tower, distribution system, and transmission main and booster station (**Figure 2-2**). As noted in North Glengarry's Development and Marketing Strategy (2020), these upgrades make it a prime destination for future residential growth and business attraction.

Figure 2-2. Maxville Water Project Distribution Upgrades

Upgrades to be completed on major thoroughfares before 2018 Highland Games.

(Source: Township of North Glengarry, Info Session, May 2018)



2.3 Relevant Plans & Studies

North Glengarry Economic Development Strategy and Action Plan (2016)

This plan sought to encourage economic growth by leveraging collaboration opportunities with the County, clearly defining roles and responsibilities, and targeting critical sectors aligned with existing strengths and opportunities.

The plan proposed that the Township be the primary deliverer of business retention and expansion (BR&E), small business start-up and entrepreneur support, while the County would prioritize investment attraction into North Glengarry from Ottawa, Montreal and national and international markets. Both entities would focus their efforts on the manufacturing, tourism and creative professionals sectors, with additional focus on attracting investment in the warehousing and transportation, and healthcare sectors.

In highlighting Alexandria and Maxville as key commercial nodes, the plan recognized commercial and industrial development was limited by Alexandria's near-capacity waste-water sewage system and Maxville's water constraints. Increased infrastructure capacity to accommodate growth was a key priority for ensuring investment readiness.

The Community Improvement Program (CIP) was seen as particularly successful in rejuvenating Alexandria and Maxville's Main Street businesses. Arts, culture, heritage and tourism, especially within the traditional downtown cores, was recognized as competitive advantages for the community.

United Counties of Stormont, Dundas and Glengarry Official Plan (2018)

Within their Official Plan, the County outlined their long-term goals and broad objectives for growth over a 20-year planning horizon in the County as a whole and in the respective Townships. The projected compound annual total population growth for the County between 2016-2036 was estimated at 0.2% with the Township of North Glengarry specifically projected to have a (-1%) population growth rate and 0.1% housing unit growth rate.

In guiding future growth the plan specifies that employment lands are to be located along transportation corridors, including provincial highways and rail lines, with consideration for fiber Internet expansion. This is expected to support redevelopment, intensification and revitalization using existing and planned infrastructure, particularly in downtowns and main streets areas. The Plan encourages town-centered, pedestrian and transit-oriented main streets that conserves and protects cultural heritage resources and encourages well-designed build form.

North Glengarry Corporate Strategic Plan 2019-2023 (2019)

Three key focus areas are identified in the Strategic Plan: infrastructure, assets, and services. A key strategic infrastructure objective is to enhance the critical infrastructure in the Township's settlement areas of Maxville and Alexandria. Plans to provide potable water to Maxville residents were to be completed by end of 2020, while upgrades to Alexandria's waste water treatment system was contingent on funding.

From a service perspective, a key strategic objective is to ensure the Township is ready for business development and residential growth. Actions to be completed by spring 2020 included plans to attract residential growth to Maxville and Alexandria, and developing a marketing plan to attract industrial and commercial businesses. This resulted in the Development and Marketing Strategy adopted by Council in 2020.

North Glengarry Development and Marketing Strategy (2020)

The aim of this strategy was to increase resident attraction and retention in Alexandria and Maxville as primary study areas. High quality of life in North Glengarry and low cost of living were viewed as strengths for attracting new residents, while job availability and employment opportunities were considered limiting factors compared to Ottawa and Montreal. While there was significant opportunity to attract remote workers, the availability of broadband Internet in the Township (outside of Alexandria and Maxville) was another limiting factor.

Notable strengths included the established food scene (particularly in Alexandria), entrepreneurial culture, affordability, and the hospital and growing health care sector. Opportunities included attracting new housing development, young families and remote workers, and improving Internet connectivity and critical infrastructure. The completion of Maxville's water project in early 2020 makes it the prime destination for current residential growth, while pending upgrades to Alexandria's wastewater treatment facilities are limiting large residential development in that market. Township aspirations include having lively main streets with thriving independent businesses, and to be a community on the cutting edge of culture, local food, festivals and events.

Families with younger children, and remote-operated and lifestyle/main street business owners are two new resident market segments the Township aims to attract through this Strategy. Positive performance in the availability of commercial space, proximity to highways and markets, and the presence of the business community (notably on Alexandria and Maxville's main streets) support business growth. However population decline may represent a competitive disadvantage for business looking to retain local talent.

The Strategy's critical path to success was to enable and support subdivision development in Maxville as a primary area for residential growth. Secondary activities in support of the critical path included completing a commercial gap analysis to identify and prioritize the types of retail and services Maxville and Alexandria could support, and understanding the potential of infill lands in established residential areas and vacant second-floor commercial main street units.

Alexandria Main Street Environmental Assessment (2020)

Between 2019-2020, BTE Engineering prepared an environmental assessment for improvements to County Road 34 (Main Street, **Figure 2-3**) in Alexandria for the United Counties of Stormont, Dundas and Glengarry. Truck movements through the Main Street, lack of pedestrian crossovers, and on-street parking were some of the issues which prompted the study. Roadway improvements, cross sections, intersections and active transportation alternatives were developed and evaluated through this assessment.

Notable recommended improvements actionable through this study (phase 1) included:

- » Traffic calming by narrowing travel lanes (3.2m to 2.0m) and acquiring property 'slivers' to create wider sidewalks and allow select on-street parking, and by improving truck route bypass signage to County Road 45/46.

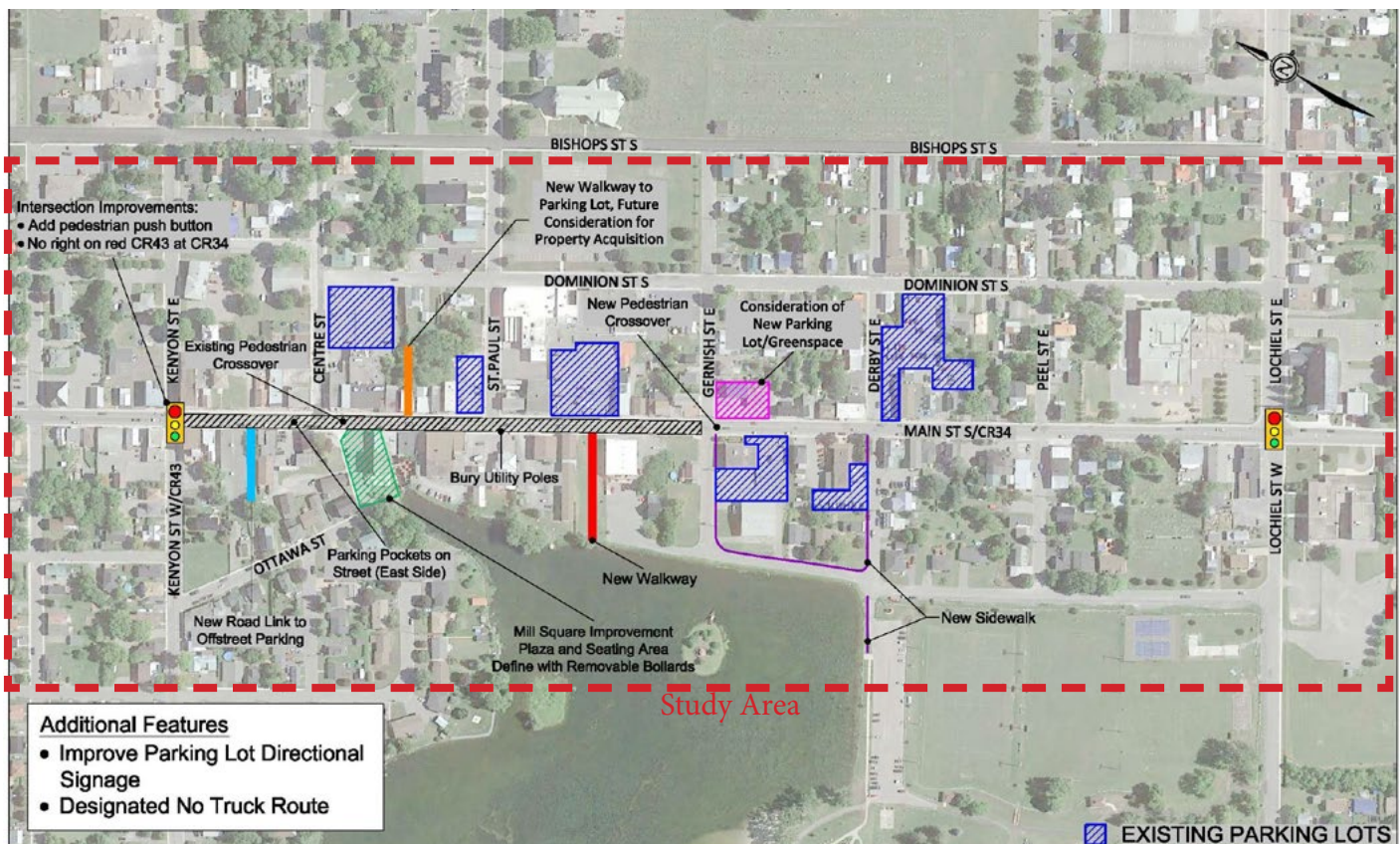
- » Refreshing the look of Main Street with new asphalt, sidewalks, decorative lighting, streetscaping, plantings, furniture, and Share the Road signage.
- » Reconfiguring Mill Square between Main Street South and Ottawa Street to become a one-way road with parking and space for a parkette/farmers market.
- » Expanding pedestrian infrastructure including pedestrian push buttons and crossovers, a new pedestrian walkway to Mill Pond from Main Street South, and a new walkway to an existing parking lot in place of the current Pigeon Building.

This Environmental Assessment is the first stage of planning for future projects and will inform future capital projects by the County and Township (subject to funding availability).

Future studies (phases 2 and 3) would examine long terms solutions for the truck bypass route including a roundabout at the intersection of County Road 45 and Main Street South.

Figure 2-3. Recommended Phase 1 Improvements (Study area emphasis added)

(Source: United Counties of Stormont, Dundas and Glengarry Public Information Website)



Township of North Community Improvement Plan (2021)

The Community Improvement Plan (CIP) aims to enhance the appeal of Alexandria and Maxville's main streets (as two of the Community Improvement Areas) by providing grants and loans for restoring and rehabilitating exterior facades, installing new signage, and improving landscaping features. Ground-floor commercial occupancy and mixed-use development is encouraged through the program which has operated since 2015.

The CIP and supporting bylaws outline Alexandria's desired role as:

A multi-functional street integrated into an important ground transportation network, Alexandria Main Street offers a wide array of products and professional services to North Glengarry residents, regional consumers and visitors while accentuating the importance of arts and culture.

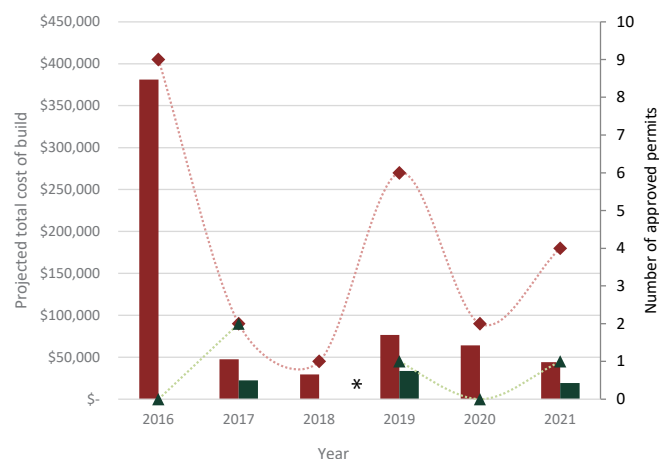
In contrast, Maxville's desired role is more local in focus:

A pleasant and friendly street in the heart of a quaint and vibrant neighbourhood offering a collection of specialized products and services to satisfy foremost the needs of Maxville's residents, as well as its visitors, and where one finds a variety of leisure activities and events that characterize the neighbourhood and its Celtic roots.



Figure 2-4. Commercial CIP improvements in Alexandria and Maxville (2016-2021)

*Maxville Home Hardware build is not represented below as it is considered an outlier. Reported project value based on CIP data. (Source: Township of North Glengarry CIP data & FBM)



The plan also specifies the desired image of both communities. For Alexandria:

Administrative and commercial centre, gateway and window to the township of North Glengarry, Alexandria Main Street presents itself as a grand commercial street that is diverse, attractive, clean and secure and inviting to both motorists and pedestrians with its public amenities, its dynamic appearance and its high quality signage.

For Maxville:

A traditional Main Street where people can stroll, relax, enjoy a variety of activities and leisure pursuits and shop in a charming village atmosphere that is highlighted through its physical setting, its architecture and its history.

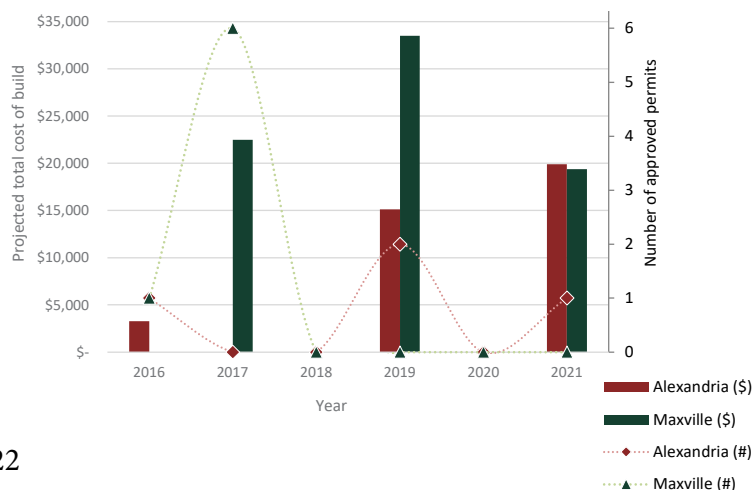
In seeking to achieve these roles and images, the first phase of the CIP (2015-2017) concentrated on commercial and residential improvements in the urban village areas. Rural hamlets were the focus of phase 2 (2018), and commercial fringe areas, industrial zones and heritage buildings are the priority in phase 3 (2019-2026). In this last phase, applications from commercial establishments take priority.

Between 2016-2021, the CIP supported 24 commercial permits in Alexandria and 5 in Maxville (Figure 2-4). Residential permits were noticeably lower, with 6 and 7 permits supported in Alexandria and Maxville, respectively (Figure 2-5). Total projected cost of commercial builds in Alexandria was \$643,356, with an additional \$2,275,354 attributed to Maxville (including the \$2.2m* new Home Hardware).



Figure 2-5. Residential CIP improvements in Alexandria and Maxville (2016-2021)

(Source: Township of North Glengarry CIP data & FBM)



Before

After

Figure 2-6. Before and after images of commercial properties in Alexandria that used CIP funds.



39 Main Street N, Alexandria (2013) - About Everything Antiques, Books and Art
(Source: Google Streetview)



39 Main Street N, Alexandria (2022) - La Belle Sorelle
(Source: FBM)



23 Main Street N, Alexandria (2017)
(Source: FBM)



23 Main Street N, Alexandria (2022) - Buvette du Marché gastropub
(Source: FBM)



8 Main Street S, Maxville (2015) - Home Hardware
(Source: Google Streetview)



8 Main Street S, Maxville (2021) - Home Hardware
(Source: Atlantic Pub and Eatery Facebook)

2.4 Building Permits

Building Permit activity can provide empirical evidence of growth dynamics necessary to support commercial and retail opportunities.

Table 2-1 illustrates historic volume of building permits in North Glengarry with particular focus on commercial activity in Alexandria and Maxville. This reveals a steady pattern of overall development in the Township with an average of 236 permits per year. Alexandria accounts for 54% of total permits on average per year, with Maxville accounting for a further 10%. Alexandria captures on average 11 commercial permits per year and Maxville an average of 4.

In Alexandria, the total permits estimated value has fluctuated between \$4.6m and \$21m with the high value in 2017 being attributed to two 8 unit apartment buildings at 43 Bishop St N. In Maxville, the total permits estimated value has ranged between \$1k to \$500k with new water tower in 2017 (estimated at \$2m) and a new Home Hardware in 2018 (estimated at \$1m*) being recent major projects.

2.3 Transportation Context

Alexandria and Maxville are separated by a 20 minute country drive, and are both located along the CN Rail Line (**Figure 2-7**). VIA Rail provides passenger train service on between Ottawa and Montreal along this high frequency rail corridor with an unstaffed stop in Alexandria. As of this writing, weekday service between Ottawa and Alexandria runs twice a day in both directions, with service between Montreal and Alexandria running four times a day in both directions.

Additional new high frequency rail tracts connecting Toronto to Ottawa was announced in July 2021 with service expected to start in 2030 (**Figure 2-8**). This expanded network is expected to shorten travel time between Toronto and Ottawa by up to 90 minutes while introducing new stops in Eglinton and Peterborough. Greater connectivity to Toronto and increased traffic along this corridor could benefit Alexandria commuters and businesses.

Prior to the COVID-19 pandemic, 417 Bus Lines provided commuter bus service between Ottawa, Alexandria, Maxville and surrounding communities. However as of January 2022, their commuter services have been suspended indefinitely.

Table 2-1. Township of North Glengarry Building Permits (2015-2021)

*Maxville Home Hardware reported project value according to building permit data.
(Source: Township of North Glengarry & FBM)



Year	North Glengarry		Alexandria				Maxville			
	All types		All types		Commercial Only		All types		Commercial Only	
	Total permits	Total project estimated value	Total Permits	Total project estimated value	Total Permits	Total project estimated value	Total Permits	Total project estimated value	Total Permits	Total project estimated value
2016	269	\$11,585,496	138	\$4,612,524	21	\$753,600	30	\$1,628,630	2	\$15,330
2017	241	\$30,528,366	120	\$21,753,967	12	\$1,102,800	34	\$3,712,466	9	\$111,000
2018	221	\$15,274,920	114	\$5,590,100	8	\$401,540	22	\$3,582,500	1	\$1,000,000 *
2019	224	\$12,710,623	125	\$7,927,623	9	\$466,000	21	\$1,937,500	5	\$503,000
2020	224	\$12,508,911	128	\$6,005,121	7	\$157,145	16	\$2,067,500	1	\$1,000
2021*	241	\$22,453,747	140	\$11,713,347	11	\$1,607,000	30	\$4,312,300	5	\$76,400
*YTD Nov 2021										
TOTAL	1420	\$105,062,063	765	\$57,602,682	68	\$4,488,085	153	\$17,240,896	23	\$1,706,730

Traffic Counts

Transportation attributes are an essential foundation to meeting demand in the retail sector. An understanding of these attributes can help create the necessary conditions for attracting and retaining businesses and residents to locate in a community.

Alexandria's Main Street, also known as County Road 34, forms the main spine of the community. It connects Alexandria to provincial highway 417 to the northwest, and intersects with Kenyon Street (County Road 43), another well used roadway in the region.

Maxville's Main Street is County Road 20, another popular route with similar access to highway 417. The most recent traffic counts available for the area are from the United Counties of Stormont, Dundas and Glengarry for summer 2018. Traffic volumes for major corridors in Alexandria and Maxville are mapped on **Figure 2-9**. Average Daily Traffic (AADT) counts range between 1,200 - 2,300 in Maxville and 1,600 - 7,100 in Alexandria with markedly higher traffic at the centre of Main Street (~10,800). High Main Street traffic volumes reflect the role these areas play as commercial and community hubs for local residents and beyond.

Figure 2-7. Drive times between Alexandria, Maxville and surrounding communities

(Source: FBM)

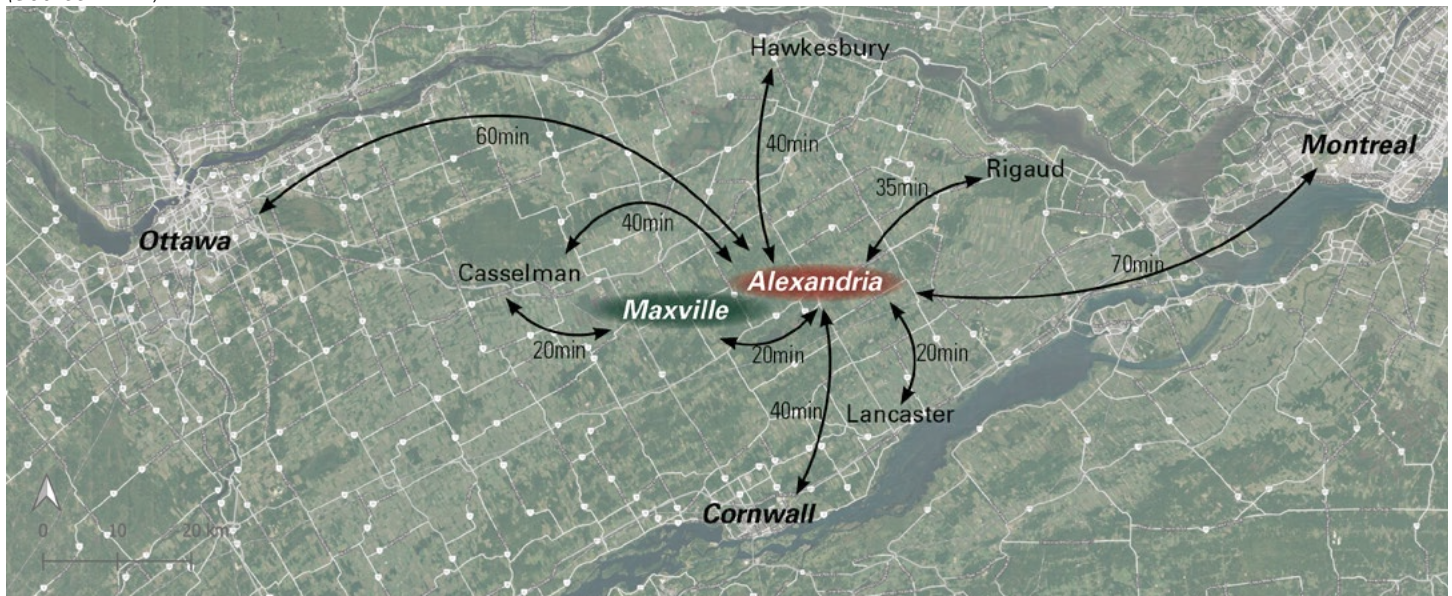


Figure 2-8. Proposed High Frequency Rail Tracts Between Toronto and Quebec City (July 2021)

Emphasis added to Alexandria. (Source: VIA Rail, curtesy of Township of North Glengarry)

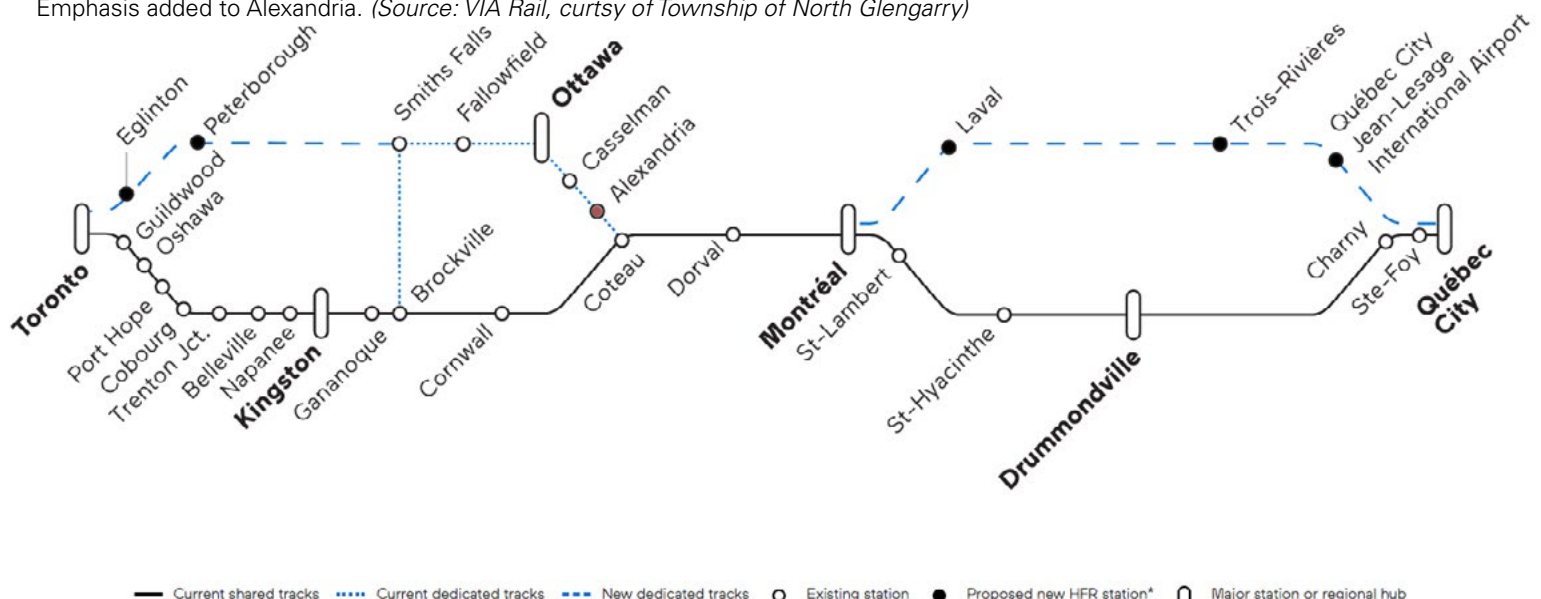
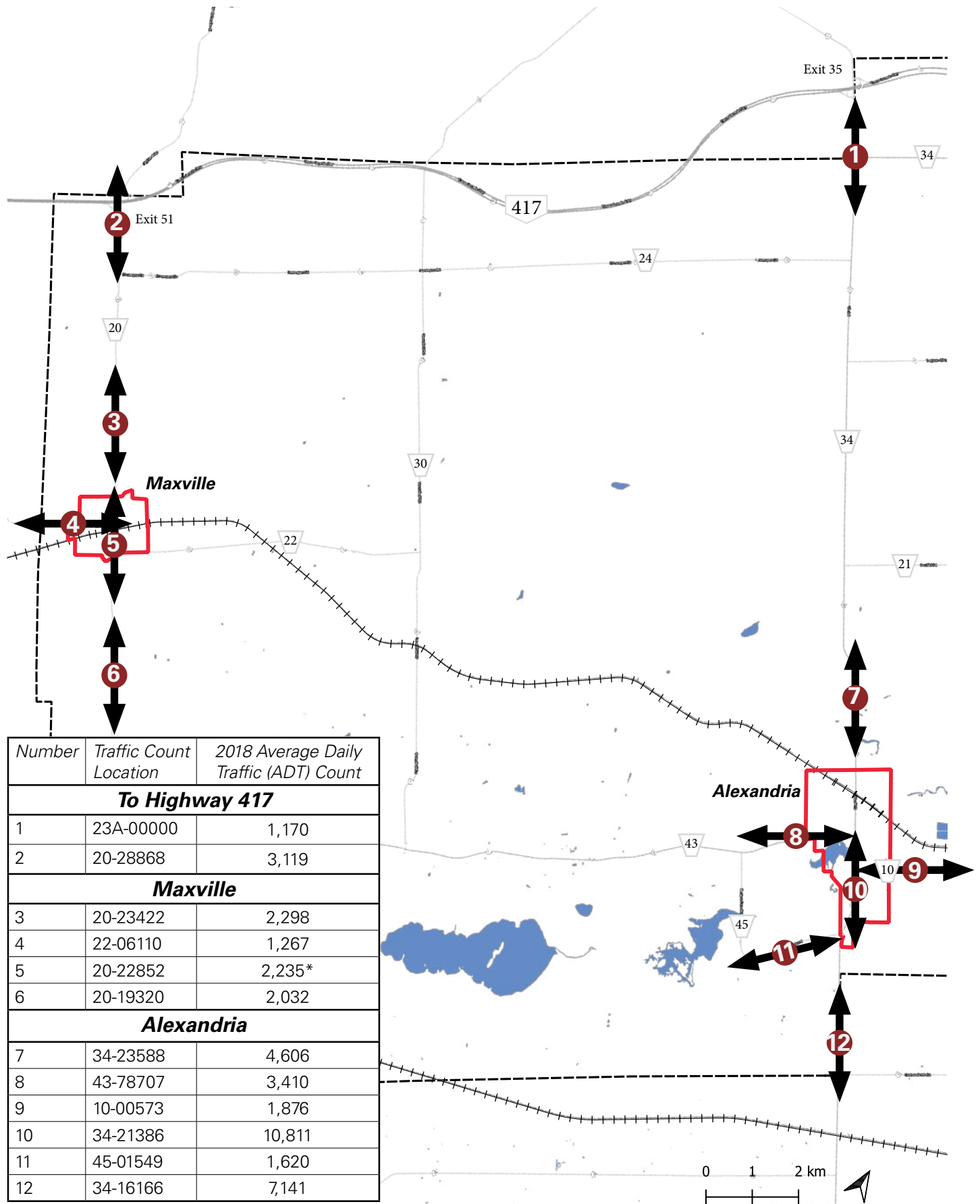


Figure 2-9. Traffic Count Map

(Source: FBM with traffic data provided by United Counties of Stormont, Dundas and Glengarry)



*2019/2020 Data

3.0 Trends and Case Studies

3.1 Introduction

The following section provides a high level overview of the impact that the COVID-19 Pandemic has had on retail, as well as some of the trends that have become more prevalent and likely to continue shaping the retail landscape.

3.2 COVID-19

Over the past two years, the novel Coronavirus (COVID-19) has changed the way many Canadians work, shop, travel and trade. More people are working from home, shopping online, and vacationing and traveling locally, while companies invest in technology and encourage consumers to buy local goods¹. Lockdowns and travel restrictions meant Canadians were spending less time in brick and mortar establishments and many were opting to travel on foot, on wheels, or via a personal vehicle instead of using public transit. Nationwide, retail sales dropped in 2020, and rebounded in 2021 as vaccines became available, restrictions began to ease, and consumer confidence increased. Trends include strong spending in home-related categories, job growth in professional services, government and technology, and continued pressure on the hospitality and food/beverage sectors². This created an encouraging environment for retail spending which contributed to record high overall sales in Q4 2021³.

Canadian businesses continue to face a number of challenges and opportunities in 2022, including:

- » Significant supply chain backlogs and disruptions impacting the movement of goods⁴.
- » Rising interest rates and inflation leading to increases in the cost of living and cost of goods⁵.
- » Shortage of retail talent encouraging retailers to improve retail jobs, wages and benefits⁶.
- » Renewed focus on “conscious consumerism”⁷ by providing sustainable products and following triple bottom line (people, planet, profit)

businesses models⁸.

- » Retail vacancy rates continue to decline⁹ and new and established businesses are using pop-ups to activate vacant spaces¹⁰
- » Growth of e-commerce and consumer demand for flexible shopping and order fulfillment¹¹.

E-Commerce and Omnichannel Trends

COVID-19 has accelerated many existing retail trends that retailers have been seeing for years¹². E-commerce sales in Canada grew from 6.8% of retail sales in 2019¹³ to ~11% in 2021¹⁴ representing increased consumer interest in online shopping throughout the pandemic. The majority of purchases still occur in brick and mortar establishments, with consumer preference toward smaller, free-standing stores over enclosed shopping malls¹⁵. The pandemic quickened the structural decline of malls, which were struggling even before the pandemic, while bolstering automation and the technological revolution¹⁶.

Demand for e-commerce, omnichannel retail and delivery services is expected to continue to grow even as pandemic restrictions ease^{17,18}. The role of brick and mortar stores is also shifting as retailers transform portions of storefronts into micro-fulfillment centres for online orders¹⁹. With reopening plans across Canada underway, retailers are continuing to adjust their store configuration and offerings to respond to the easing of restrictions while balancing healthy and safety concerns for staff and consumers alike.

1 Eight Ways COVID Will Transform the Economy and Disrupt Every Business, Stackhouse, 2020

2 Canadian Retail Marketbeat Report, Cushman Wakefield, Q42021

3 Ibid

4 Headwinds and Tailwinds, Avison Young, 2022

5 Top Trends that will Shape the Near-and Long-Term State of the Retail Industry in Canada (Part 1), S., Terry, Retail Insider, 2022

6 Top Trends.... Part 1, Retail Insider, 2022

7 2022 Retail Outlook, Colliers, 2022

8 Top Trends....Part 2, Retail Insider, 2022

9 2022 Retail Outlook, Colliers, 2022

10 Pop-Up Retail in Canada Grows Significantly Amid COVID-19 :Experts, M., Toneguzzi, Retail Insider, 2020

11 Consumer Demand for Greater Flexibility and Options Leading to Increasing Retail Innovation, S., Terry, Retail Insider, 2022

12 Accelerating shifts driving a radical rethink of the customer journey, PWC, 2020

13 The Top Retail Trends in Canada in 2020 to Watch, McKinnon, 2020

14 Canada Retail Marketbeat....., Q42021

15 Four Trends Reshaping the Future of Retail, B., Peterson, Forbes, 2021

16 Top Trends that will Shape the Near-and Long-Term State of the Retail Industry in Canada (Part 2), S., Terry, Retail Insider, 2022

17 Ibid

18 Accelerating shifts..., PWC, 2020

19 Top Trends....Part 2, Retail Insider, 2022

Main Street Recovery

Main Streets are defined by a strong cluster of businesses with supporting residential and institutional uses that contribute to a strong cluster of activity at the heart of a community¹. For Main Street retail businesses to be successful, they generally need predictable and stable revenues and costs, sufficient cash reserves and access to financing, and transparent and efficient regulatory frameworks². Coupled with this are location specific elements, including a cost-competitive business location along Main Street, supportive and efficient public infrastructure and services, and sufficient market support in the local area³. Abrupt changes in costs and operating procedures due to the pandemic, significant debt levels for small businesses⁴, and long standing structural barriers, has forced many businesses to temporarily or permanently close.

The Canadian Urban Institute (CUI) launched the Bring Back Main Street Initiative early on in the pandemic with the intention of supporting Main Streets across Canada through these challenging times. One of the topics they explored through their Solutions Briefs was how to establish small-business- friendly policy⁵. While primarily geared toward informing policy makers on near-term measures to mitigate the effects of COVID restrictions on Main Street businesses, the Brief also highlights opportunities to build back better. Solutions include⁶:

- » Simplifying regulations and communications to aid business owners in navigating, and ultimately complying with, municipal, provincial and federal regulations.
- » Supporting small businesses in accessing legal and real estate advice and negotiations support through the provision of information and funding, and establishment of mutually beneficial partnerships.
- » Exploring options for mitigating COVID-related assessment changes and tax shifts across commercial properties that threaten the sustainability of Main Streets.

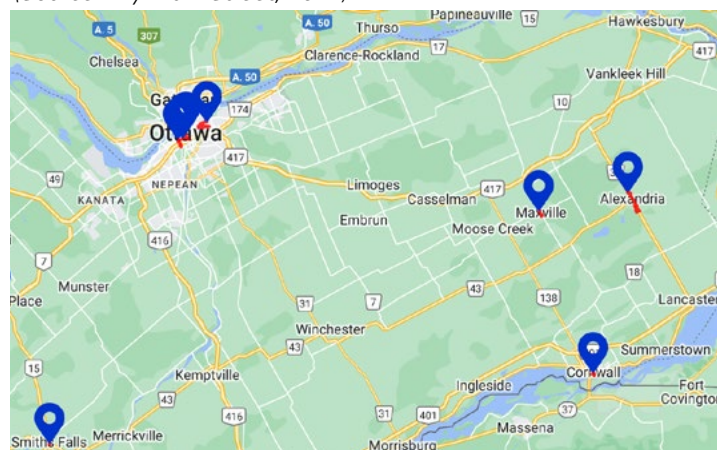
- » Supporting new, innovative, community-based financial models as stable funding sources for Main Street businesses, including minority-owned and newcomer-owned businesses and start ups.
- » Supporting the animation of vacant storefronts along Main Streets through partnerships with community groups, entrepreneurs, and real estate professionals.

To support Main Street revitalization in southern Ontario, the CUI and Economic Developers Council of Ontario (with funding from the Federal Economic Development Agency for Southern Ontario) established the My Main Street Local Business Accelerator program. This economic development program establishes a community market profile and provides funding for hiring Main Street Ambassadors to support new and existing businesses⁷. The Township of North Glengarry successfully applied to participate in this program which will support a total of 119 businesses in Alexandria and Maxville's main street areas, respectively. Key strategic areas of focus will be on business retention and expansion, and small business start up with support and collaboration with community partners. Notably, Alexandria and Maxville the only two small towns in the United Counties Stormont, Dundas and Glengarry or the United Counties of Prescott and Russell to participate in this program (**Figure 3-1**).

7 My Main Street Local Business Accelerator Program, 2022

Figure 3-1. Participating Communities in the My Main Street Local Business Accelerator Program

Only communities in north eastern Ontario are represented here.
(Source: My Main Street, 2022)



With the support of My Main Street, the easing of COVID restrictions, and the gradual return of office workers, retailers have the potential to once again serve as key draws to main streets. Collaboration between landlords, retailers, community groups, and local governments will be essential in re-establishing main streets and downtowns as lively, attractive and accessible spaces⁸. Opportunities exist to shift the retail mix and introduce new offerings to attract different groups, such as students, as communities seek to increase the critical mass of people in main street and downtown areas⁹.

3.3 Rural Internet

COVID-19 has shone a spotlight on the importance of reliable high-speed Internet for enabling people to live, work and learn in rural areas. This longstanding issue was recognized by the Canada Radio-television and Telecommunications Commission (CRTC) in 2016 when they declared broadband Internet service a basic essential service¹⁰. Specifically, the CRTC set minimum basic Internet speeds of at least 50 Mbps for downloads and 10 Mbps for uploads¹¹.

8 Canada Retail Outlook, JLL, Nov 2021

9 Ibid

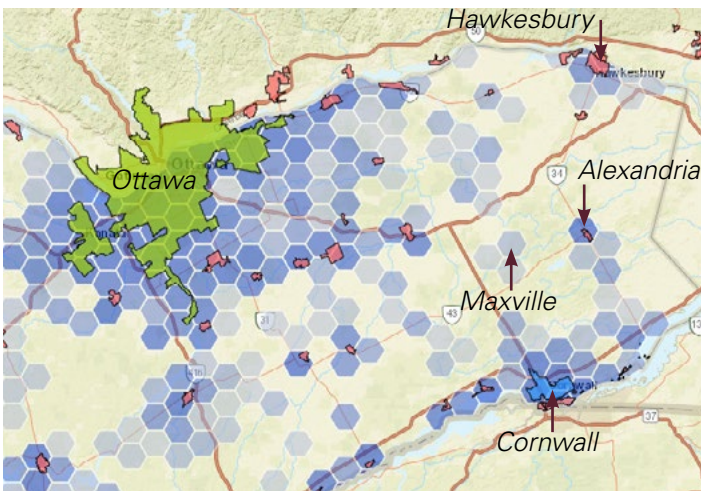
10 CRTC declares broadband Internet access a basic service, M. Kupfer, Dec 16 2016

11 What you should know about Internet speeds, CRTC, 2022

Figure 3-2. Internet Service Levels in Eastern Ontario

Hexagon colour represents the percentage of households in that area which meet the minimum Internet service speeds (high percentages are darker purple). Polygons represent small (red/orange), medium (blue) and large (green) population centres. Community labels added manually for context.

(Source: *Improving Connectivity for Ontario map tool*, 2020)



The Eastern Ontario Regional Network (EORN) has been working on this issue since 2010 with the goal of improving rural connectivity, supporting economic growth and enhancing quality of life¹². In August 2020, EORN announced it was seeking federal and provincial support to increase Internet speeds to 1 gigabit per second (1 Gbps/1,000 Mbps)¹³. By aiming for speeds 20 times the minimum service level, the EORN planned to support long term demand in its 13 municipal members including the United Counties of Stormont, Dundas and Glengarry. However, as of fall 2021 the EORN had halted the Gig Project in light of the Ontario Connects plan being announced.

Ontario Connects is an ambitious investment plan for achieving 100% Internet connectivity to the minimum service level by December 2025 for the entire province¹⁴. Infrastructure Ontario began the procurement process in 2021 and service areas are to be announced in Spring 2022¹⁵.

In addition to provincial efforts, the United Counties of Stormont, Dundas and Glengarry announced in January 2021 that it would be providing a letter of support for Xplornet to receive funding from the Universal Broadband Fund. This funding would help offset the cost of building over 900km of new fibre optic Internet in rural communities, including 68km in the County.

In the Township of North Glengarry, Internet service is currently clustered around Alexandria and Maxville, with the 92% of residential households in Alexandria meeting basic Internet service levels¹⁶ (**Figure 3-2**).

3.4 Retail Development Fundamentals

Retail development, whether in secondary communities such as Alexandria, or like those in more urban markets like Ottawa and Montreal, are driven by critical business fundamentals that must be acknowledged and considered when identifying retail opportunities.

12 Who we are, Eastern Ontario Regional Network, 2022

13 Eastern Ontario Regional Network Proposes Ultra-Fast Gig Internet Project, Township of South Glengarry, 2022

14 Historic Investment Plan Ensures Access to High-Speed Internet for All, Government of Ontario, 2021

15 Request for Proposals Issued to Qualified Internet Service Providers, Infrastructure Ontario, Nov 2021

16 Improving Connectivity for Ontario map tool, 2020

By way of a checklist¹, these include:

- ☑ Population characteristics of the consumer base;
- ☑ The reality that retail follows consumers;
- ☑ Consistent and high shopper traffic is a prerequisite for most retailers;
- ☑ The consumer base must demonstrate sufficient buying power to be of interest to retailers;
- ☑ Chain retailers have a limited number of prototypical store formats that they are willing to operate. Deviating from these established formats is done only as a last resort in circumstances where demand for a location by a retailer or developer is high;
- ☑ Most retailers require sites with convenient access, high visibility, and ample parking;
- ☑ Most retailers expand in well-defined geographic areas that coincide with distribution network and a familiarity with consumer preferences;
- ☑ Most retailers have established criteria for site selection;
- ☑ Clustering of compatible retailers is the norm;
- ☑ Retailers cannot generally survive rent-to-sales ratios in excess of 15%. Retailers have a threshold level of sales they know they must achieve to be profitable; and
- ☑ Retailers attempt to maximize profitability by operating the fewest number of stores possible in any market to avoid sales transference.

3.6 Comparable Case Studies

The following section details comparable main streets in Ontario and Alberta which have transferable lessons for Alexandria and Maxville.

The key to the case studies presented is that they are all located outside of the primary catchment of a larger urban centre and therefore have a trade area that extends beyond merely its local population. Each of these communities resonates with a target catchment of 20,000 to 25,000 residents as its core regular users.

Also, while each community may have a small local population base within its political boundaries, the trade areas reach beyond the political boundaries and therefore have established themselves as a larger draw. Using examples in Alberta is applicable because of the ability and ease with which residents are prepared to drive for certain bigger-ticket items, as they are in North Glengarry.

Another local example to consider is Vankleek Hill. With a mix of local and branded goods and services clustered along Main Street East and High Street, Vankleek Hill's Main Street area is a destination for both residents and visitors alike. Well maintained storefronts invite people in, and businesses like the Broken Kettle and the Creating Centre animate the street by spilling out onto the sidewalk.

Vankleek Hill can also serve as a local example of a vibrant main street destination that Alexandria and Maxville could aspire to become.

¹ Developing Successful Retail in Secondary and Rural Markets, ICSC, 2007

Prescott, Ontario

The Town of Prescott is strategically located south of Highway 401 along the St Lawrence River, with close proximity to the Port of Johnstown and rail lines. The Town has an established commercial main street area which supports a mix of retail storefronts and office uses, and attracts workers from surrounding communities. Revitalization efforts are centered on this RiverWalk District as the Town and the Downtown Prescott Business Improvement Area (BIA) seek to draw visitors and residents downtown for authentic Prescott experiences.

With demand for RiverWalk retail and office space projected to increase over the next decade, the Town is providing Economic Development site selection services to businesses and will soon be launching a site selector tool for locating industrial or commercial properties for sale/lease.

Like Alexandria, Prescott’s anchor grocery tenants currently include Independent Grocer and Giant Tiger.

Quick facts

- » Community population: 4,222
- » Nearest major market: City of Cornwall (1h NE)
- » Trade Area population: 19,230
 - » Population growth rate (5yr): 0.6%
- » Average household income: \$64,725
- » Number of businesses: 185
- » Top NAICS codes (by number of businesses)
 - » Retail Trade
 - » Other Services
 - » Accommodation and Food Services



(Source: Google Streetview, 2021)

Vegreville, Alberta

The Town of Vegreville is located approximately 1 hour drive time east of the City of Edmonton along Hwy 16 and represents a key centrality within a region for which drive times of 15, 30 and 45-minutes prevail. The resulting Trade Area for Vegreville comprises just under 28,000 full-time residents (27,484).

The Top 5 retail categories in terms of overall retail floor space in Vegreville are:

1. Grocery & Specialty Foods	89,040 sf
2. Auto/RV/Motorsports	55,200 sf
3. Home Improvement & Garden	51,488 sf
4. Finance/Insurance/Real Estate	42,150 sf
5. Clothing & Apparel	38,098 sf

Because Vegreville has reached a trade area population threshold of 25,000, notable tenants include Walmart, Peavy Mart, Marks, Canadian Tire, The Brick and Boston Pizza. In addition to the Walmart, Vegreville has two (2) traditional grocery stores (No Frill and Coop) totaling 60,650 sf.

The resulting trade area population measured against the inventory results in a per capita floorspace ratio of 19.5 sf per capita.

Quick facts

- » Community population: 5,708
- » Nearest major market: City of Edmonton (70min)
- » Trade Area population: 27,484
 - » Population growth rate (5yr): 1.4%
- » Average household income: \$91,725
- » Number of businesses: 145
- » Top NAICS codes (by number of businesses)
 - » Retail Trade
 - » Other Services
 - » Accommodation and Food Services



(Source: Town of Vagreville)

Lac La Biche, Alberta

Lac La Biche is located approximately 2-hour drive time northeast of the City of Fort Saskatchewan (Alberta). Lac La Biche represents a key centrality within a region for which drive times of 30, 60 and 90-minutes prevail. The Total Trade Area population is estimated to be just under 27,000 (26,645).

Like Maxville is to Alexandria, the Hamlet of Plamondon is a small village approximately 15 to 20 minutes from Lac La Biche, which has a small cluster of locally oriented shops including a Coop grocery at 18,000 sf. This type of small grocer could be a future near term target opportunity for Maxville.

The Top 5 retail categories (excluding Auto) in terms of overall retail floor space are:

1. Grocery & Specialty Foods 101,958 sf
2. Home Improvement & Garden 61,261 sf
3. Full Service Restaurants 37,800 sf
4. Clothing & Apparel 22,765 sf
5. Alcohol & Tobacco 21,670 sf

Quick facts

- » Community population: 8,330
- » Nearest major market: City of Fort Sask. (2h SW)
- » Trade Area population: 26,645
 - » Population growth rate (5yr): 0.69%
- » Average household income: \$101,358
- » Number of businesses: 131
- » Top NAICS codes (by number of businesses)
 - » Retail Trade
 - » Accommodation and Food Services



Black Diamond, Alberta

The Town of Black Diamond is located on the Cowboy Trail (also near the town of Turner Valley), and is a popular tourism route extending along the foothills of the Rocky Mountains. The Town's main street area is mostly composed of single story retail storefronts at the intersection of Highway 7 and 22. Black Diamond provides basic retail services for its residents, with the nearby town of Okotoks acting as the primary service centre.

In 2020, the Town annexed additional lands along its border to accommodate future residential and commercial demand over the next 50 years. This has prompted renewed interest in Black Diamond's housing market, with demand for commercial space expected to grow alongside the population.

Because Okotoks is approximately 20 minutes drive time away and the City of Calgary (south) is approximately 1 hr, Black Diamond is poised to become a prominent community for remote or new permanent residents, like Alexandria or Maxville. Presently the inventory is premised on small local retailers, although future growth prospects include the addition of more branded grocery and highway commercial retailers in potential new developments.

Quick facts

- » Community population: 2,834
- » Nearest major market: City of Calgary (1h N)
- » Trade Area population: 17,341
 - » Population growth rate (5yr): 0.8%
- » Average household income: \$101,436
- » Number of businesses: 157 (17 branded)
- » Top NAICS codes (by number of businesses)
 - » Accommodation and Food Services
 - » Retail Trade
 - » Other Services



4.0 Trade Area

4.1 Introduction

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 Alexandria's and Maxville's retail sales are most frequently and likely to be sourced. Generated Trade Areas 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.

As a first step, a Retail Trade Area is delineated to identify the geographic region from which regular patronage could be expected, based on a series of boundary determinants. Major considerations in defining Retail Trade Areas were applied to determine the most realistic Trade Areas, as well as to 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, Retail Trade Areas are delineated utilizing a combination of drive times and competitive forces including the similar sized nearby communities of Casselman, Hawkesbury, Rigaud, and Lancaster. Alexandria's trade area (**Figure 2-9**) is oriented towards the northeast and encompasses residents within a 20-40 minute drive time. Maxville as a smaller retail market garters a notably smaller Trade Area, attracting residents within approximately a 15 minute drive time.

Alexandria's retail offering is stronger, therefore it is the dominant trade area of the two. Residents living between Alexandria and Maxville (see trade area overlap on **Figure 2-9**) may choose to visit either Maxville or Alexandria depending on their needs and location. As detailed in **Section 4.4.**, neither community can reasonably capture 100% of spending from this shared retail trade area.

4.2 Population Demographics and Projections

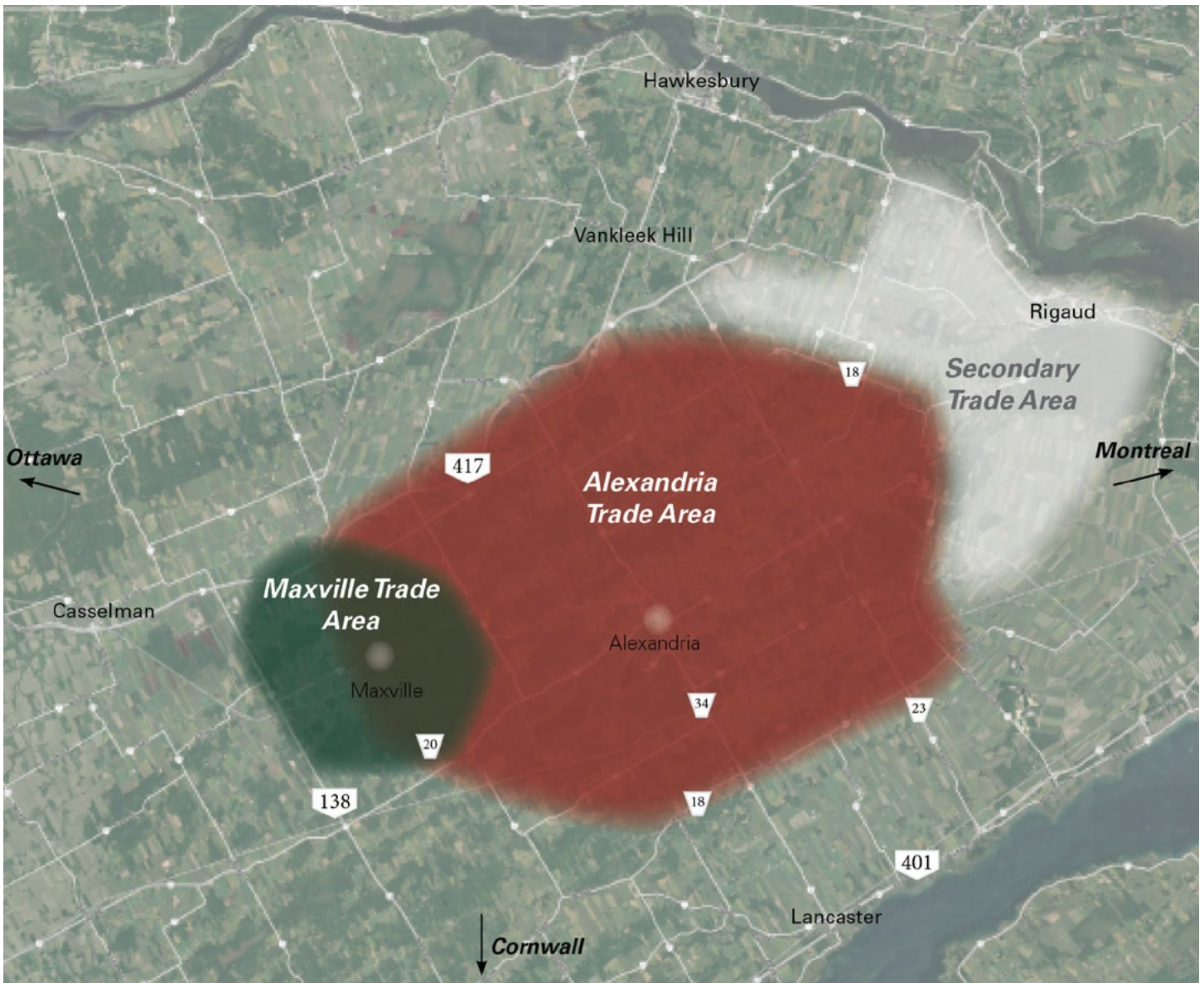
Using data sources that include the most recent Statistics Canada Census release as well as Manifold Data Mining Inc (2021) population estimates and growth forecasts were tabulated for the identified Trade Areas. These forecasts represent a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline.

Alexandria

Estimated for the end of year 2021, Alexandria's Trade Area population is 15,166 with 64% considered Rural Handymen (**Figure 4-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be slightly older and lower household income. As is the challenge for many smaller Ontario communities, the population in these areas is anticipated to decline by 0.09% per year over the next three years.

However, as will be seen in Table 4-5, past population forecasts may not accurately depict the future reality of growth in North Glengarry and in particular Alexandria, which will increasingly benefit from its location relative to Ottawa and Toronto as well as being a stop on the High Frequency Rail Corridor. Recent development proposals also provide cues for future growth prospects, which were not evident in past forecasts.

Figure 4-1. Alexandria and Maxville Trade Areas



Maxville

Estimated for the end of year 2021, Maxville’s Trade Area population is 1,982 with 100% considered Joyful Country (**Figure 4-3**). Using the province as a benchmark, the population in this Trade Areas also tends to be slightly older. Household income (\$106,925) is comparable to the Ontario average (\$109,708).

Like Alexandria, the population is anticipated to decline by 0.03% per year over the next three years, however, the reality is likely to be a different story.

Secondary Trade Area

Although not profiled as a “regular” day-to-day part of the Trade Area, it is important to acknowledge that the area east of Alexandria’s core Trade Area shown

in **Figure 4-1**, extends to include the Rigaud area and accounts for an additional 10,600 residents. To this segment, Alexandria is conveniently located and currently Rigaud residents likely drive to Hawkesbury for goods provided by its Walmart, but they are just as likely to be considered future more frequent users of Alexandria given its medical and sports/recreation facilities, within 30-minutes drive time.

From a population Trade Area perspective, by including the Rigaud area as part of a Secondary Trade Area, the total Alexandria market could reach a critical threshold of 25,000 residents, which is often viewed as a necessary benchmark for many new-to-market retailers

Overview

Table 4-2 to 4-5, Figure 4-4 and Figure 4-5 provide a more detailed depiction of each Trade Area's retail environment rather than being solely dependent upon each town's localized population base. This breakdown of the Trade Area Population is much more appealing to the business community.

Household incomes are among the most direct determinants of spending patterns and the potential for spending on retail, food and beverage, entertainment, and services.

Overall, household incomes and housing costs are lower than the provincial median in Alexandria, and on par with the median in Maxville.

This pattern bodes well for marketing to prospective developers, investors and resident prospects who are looking to create communities outside of the urban context.

Table 4-1. Trade Area Demographic Summary

(Source: Manifold Data Mining Inc & FBM)

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
SUMMARY								
Total population	14,693,829		15,166			1,982		
Total population age 15 and over	12,416,879		13,121			1,671		
Total number of private households	5,700,850		6,385			881		
Average number of persons in private households	2.53		2.23		88	2.24		89
Total population in private households	14,410,904		14,264			1,972		
Total number of census families in private households	4,076,137		4,480			586		
Average number of persons per census family	2.98		2.73		92	2.84		95
Total population in families	12,185,364		12,248			1,663		
Total number of labour force age 15 and over	8,064,478		6,980			1,187		
Land area (square km)	908,699.31		990.38			160.19		
Inhabited area (square km)			981.21			237.88		
POPULATION AGE								
Population age 0-14	2,276,950	15.50%	2,045	13.48%	87	310	15.66%	101
Population age 15-24	1,854,732	12.62%	1,885	12.43%	98	245	12.37%	98
Population age 25-34	2,061,351	14.03%	1,610	10.62%	76	255	12.87%	92
Population age 35-44	1,923,523	13.09%	1,480	9.76%	75	202	10.17%	78
Population age 45-54	1,860,941	12.66%	1,815	11.97%	95	238	12.01%	95
Population age 55-64	2,019,965	13.75%	2,637	17.39%	126	350	17.67%	129
Population age 65+	2,696,366	18.35%	3,694	24.35%	133	381	19.24%	105
DWELLING								
Total number of occupied private dwellings	5,700,851		6,385			881		
Average dwelling value \$	\$814,224		\$311,417		38	\$322,167		40
Home owners	3,973,295	69.70%	5,305	83.08%	119	765	86.81%	125
Home tenants	1,717,205	30.12%	1,080	16.92%	56	116	13.19%	44
Band housing	10,486	0.18%	0	0.00%	0	0	0.00%	0
HOUSEHOLDS								
One-family households	3,837,758	67.33%	4,261	66.73%	99	617	70.07%	104
Multiple-family households	162,446	2.85%	55	0.86%	30	7	0.83%	29
Non-family households	1,699,975	29.82%	1,893	29.65%	99	237	26.87%	90
EDUCATION								
or degree	12,416,879		13,121			1,671		
No certificate, diploma, or degree	2,175,333	17.52%	2,870	21.87%	125	334	19.97%	114
High school diploma or equivalent	3,384,448	27.26%	3,900	29.72%	109	503	30.09%	110
Post-secondary certificate, diploma, or degree	6,857,098	55.22%	6,351	48.40%	88	835	49.94%	90
Apprenticeship or trades certificate or diploma	747,204	6.02%	1,548	11.80%	196	166	9.94%	165
College, CEGEP or other non-university certificate or diploma	2,572,424	20.72%	2,886	21.99%	106	427	25.57%	123
University certificate or diploma below bachelor level	289,194	2.33%	302	2.30%	99	25	1.51%	65
University certificate, diploma, or degree at bachelor level or above	3,248,275	26.16%	1,615	12.31%	47	216	12.92%	49
Bachelor's degree	2,130,762	17.16%	1,142	8.70%	51	138	8.28%	48

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



Table 4-2. Trade Area Populations Projections Summary 2021 to 2031

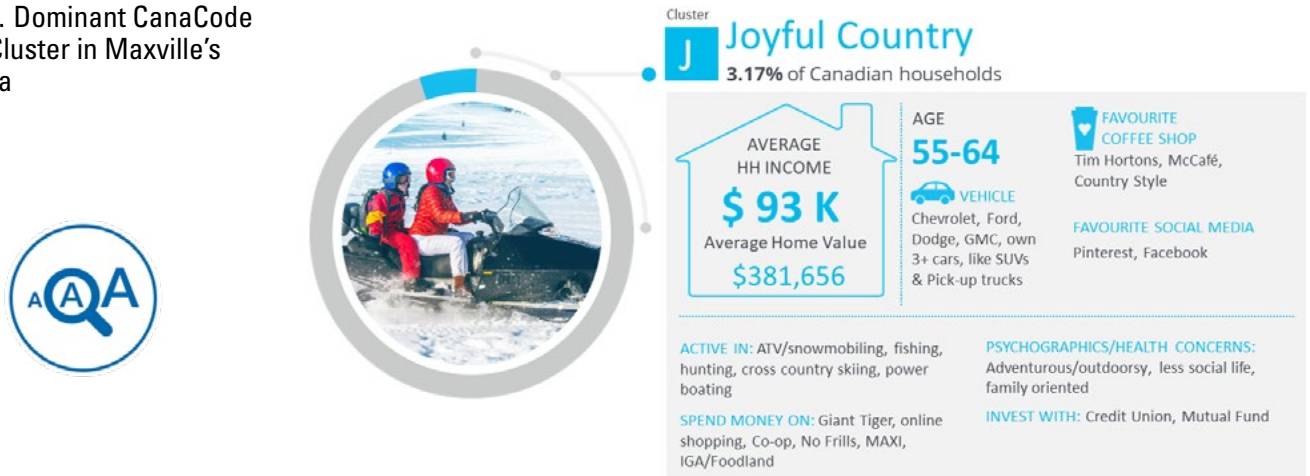
(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
PROJECTIONS								
Annual population growth in the period: Next 3 years		1.00%		-0.09%	-9		-0.03%	-3
Annual household growth in the period: Next 3 years		1.00%		0.25%	25		0.32%	32
Annual family growth in the period: Next 3 years		1.00%		0.11%	11		0.09%	9
Annual population growth in the period: Next 5 years		1.15%		-0.04%	-3		0.05%	4
Annual household growth in the period: Next 5 years		1.35%		0.47%	35		0.58%	43
Annual family growth in the period: Next 5 years		1.16%		0.25%	22		0.23%	20
Annual population growth in the period: 5 to 10 years from current year		1.08%		-0.12%	-11		0.01%	1
Annual household growth in the period: 5 to 10 years from current year		1.27%		0.40%	31		0.53%	42
Annual family growth in the period: 5 to 10 years from current year		1.08%		0.23%	21		0.23%	21
POPULATION GROWTH								
Current year total population	14,693,829		15,166			1,982		
3-Year Projections - Total population	15,211,613		15,101			1,979		
5-Year Projections - Total population	15,556,803		15,133			1,987		
10-Year Projections - Total population	16,413,919		15,047			1,987		
HOUSEHOLD GROWTH								
Current year total number of households	5,700,179		6,385			881		
3-Year Projections - Total number of households	5,937,405		6,465			895		
5-Year Projections - Total number of households	6,095,555		6,538			907		
10-Year Projections - Total number of households	6,492,049		6,669			931		
FAMILY GROWTH								
Current year total number of census families	4,092,674		4,480			586		
3-Year Projections - Total number of census families	4,238,366		4,505			588		
5-Year Projections - Total number of census families	4,335,163		4,536			593		
10-Year Projections - Total number of census families	4,575,107		4,591			599		
HOUSEHOLD INCOME GROWTH								
Current year average household income	\$109,708		\$87,212		79	\$106,925		97
3-Year Projections - Average household income	\$115,000		\$89,471		78	\$109,397		95
5-Year Projections - Average household income	\$122,372		\$92,705		76	\$112,942		92
10-Year Projections - Average household income	\$141,088		\$100,151		71	\$120,136		85

Figure 4-2. Dominant CanaCode Lifestyle Cluster in Alexandria's Trade Area



Figure 4-3. Dominant CanaCode Lifestyle Cluster in Maxville's Trade Area



Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



Table 4-3. Trade Area Population Breakdown

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
POPULATION AGE GROUP								
Total population by age groups	14,693,800		15,166			1,982		
0-14	2,276,950	15.50%	2,045	13.48%	87	310	15.66%	101
0-4	734,336	5.00%	633	4.17%	83	100	5.05%	101
5-9	754,020	5.13%	652	4.30%	84	103	5.19%	101
10-14	788,594	5.37%	759	5.01%	93	108	5.43%	101
15-64	9,720,510	66.15%	9,428	62.16%	94	1,290	65.10%	98
15-19	854,434	5.82%	894	5.89%	101	119	6.00%	103
20-24	1,000,300	6.81%	992	6.54%	96	126	6.37%	94
25-29	1,035,480	7.05%	884	5.83%	83	121	6.09%	86
30-34	1,025,870	6.98%	726	4.79%	69	134	6.78%	97
35-39	997,205	6.79%	686	4.53%	67	101	5.10%	75
40-44	926,318	6.30%	794	5.23%	83	100	5.07%	80
45-49	913,795	6.22%	829	5.47%	88	111	5.62%	90
50-54	947,146	6.45%	986	6.50%	101	127	6.40%	99
55-59	1,044,800	7.11%	1,336	8.81%	124	179	9.03%	127
60-64	975,162	6.64%	1,301	8.58%	129	171	8.64%	130
65 and over	2,696,370	18.35%	3,694	24.35%	133	381	19.24%	105
65-69	820,064	5.58%	1,137	7.50%	134	118	5.96%	107
70-74	691,318	4.71%	953	6.28%	133	99	4.98%	106
75-79	479,309	3.26%	713	4.70%	144	73	3.66%	112
80-84	328,259	2.23%	444	2.93%	131	44	2.20%	99
85 and over	377,417	2.57%	446	2.94%	114	48	2.44%	95
85-89	235,644	1.60%	247	1.63%	102	25	1.28%	80
90-94	109,852	0.75%	144	0.95%	127	13	0.65%	87
95-99	27,679	0.19%	52	0.34%	179	8	0.42%	221
100 and over	4,241	0.03%	3	0.02%	67	2	0.08%	267
Average age of total population	41.60		45.40		109	42.70		103
Median age of total population	40.90		48.40		118	43.90		107

Figure 4-4. Population Breakdown

(Source: Manifold Data Mining Inc & FBM)



Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



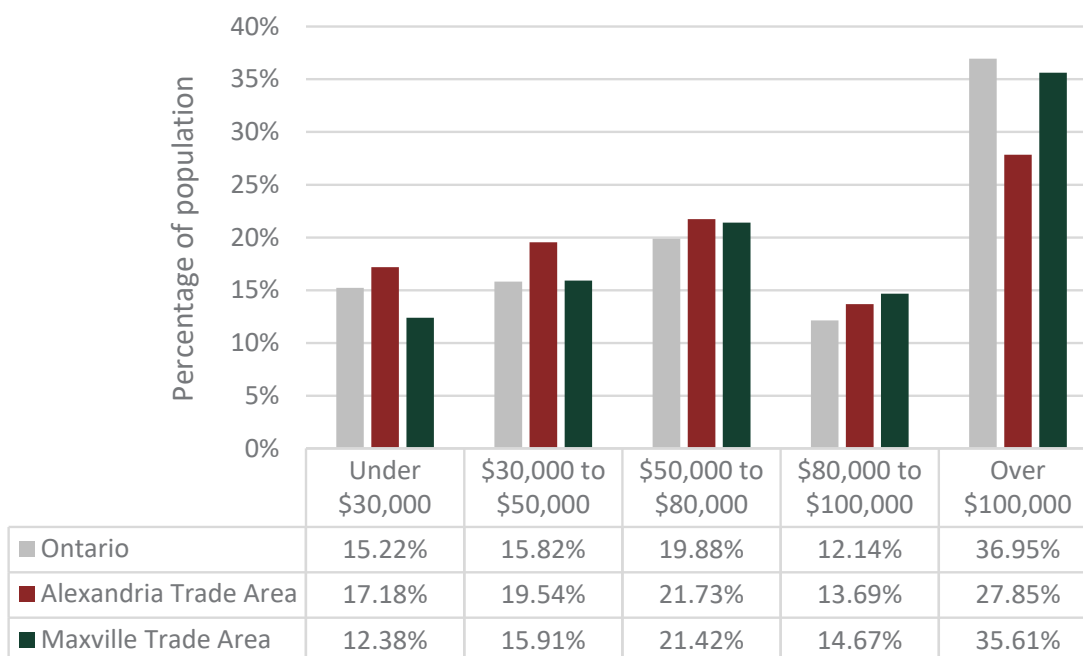
Table 4-4. Trade Area Household Income Breakdown

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
HOUSEHOLD INCOME								
Total number of households	5,700,990		6,385			881		
Average household income \$	\$109,708		\$87,212		79	\$106,925		97
Median household income \$	\$83,780		\$71,700		86	\$87,390		104
Household with income under \$5,000	72,619	1.27%	43	0.67%	53	6	0.72%	57
Household with income \$5,000 to \$9,999	79,143	1.39%	60	0.94%	68	6	0.71%	51
Household with income \$10,000 to \$14,999	126,272	2.22%	142	2.22%	100	9	1.05%	47
Household with income \$15,000 to \$19,999	178,443	3.13%	233	3.65%	117	20	2.32%	74
Household with income \$20,000 to \$24,999	203,141	3.56%	315	4.93%	138	33	3.74%	105
Household with income \$25,000 to \$29,999	207,866	3.65%	305	4.77%	131	34	3.84%	105
Household with income \$30,000 to \$34,999	217,630	3.82%	326	5.11%	134	35	3.94%	103
Household with income \$35,000 to \$39,999	225,307	3.95%	329	5.15%	130	35	3.97%	101
Household with income \$40,000 to \$44,999	228,807	4.01%	310	4.85%	121	36	4.07%	101
Household with income \$45,000 to \$49,999	230,344	4.04%	283	4.43%	110	35	3.93%	97
Household with income \$50,000 to \$59,999	365,998	6.42%	433	6.78%	106	55	6.21%	97
Household with income \$60,000 to \$69,999	389,116	6.83%	480	7.52%	110	68	7.75%	113
Household with income \$70,000 to \$79,999	377,680	6.63%	474	7.43%	112	66	7.46%	113
Household with income \$80,000 to \$89,999	356,636	6.26%	457	7.15%	114	64	7.29%	116
Household with income \$90,000 to \$99,999	335,299	5.88%	418	6.54%	111	65	7.38%	126
Household with income \$100,000 and over	2,106,690	36.95%	1,778	27.85%	75	314	35.61%	96
Household with income \$100,000 to \$124,999	530,864	9.31%	510	7.99%	86	81	9.16%	98
Household with income \$125,000 to \$149,999	468,682	8.22%	416	6.52%	79	81	9.20%	112
Household with income \$150,000 to \$199,999	496,435	8.71%	360	5.64%	65	72	8.13%	93
Household with income \$200,000 and over	610,705	10.71%	491	7.70%	72	80	9.10%	85

Figure 4-5. Population Income Breakdown

(Source: Manifold Data Mining Inc & FBM)



4.3 Summary of Employment & Labour

Table 4-6 and **Figure 4-6** provide a summary of the estimated 2021 Labour Force profile for Alexandria and Maxville's Trade Areas.

Approximately 20.7% of Maxville's employed work at home, which is slightly higher than both Alexandria (19.7%) and the provincial average (17.9%). Of those who commute to work, just over 28% of the Alexandria's workforce commutes less than 15 minutes and 61.9% use a vehicle as their primary mode of transportation.

This suggests Alexandria is a bedroom community for those working in the surrounding area. In Alexandria and Maxville, 12.7% and 15.4% of commuters travel more than 45 minutes, respectively. These workers are likely employed in the nearby Cities of Cornwall, Ottawa and Montreal. This results in a consumer outflow as people tend to shop near their work place.

Referring to **Table 4-7**, in terms of employment sector (by total employment), Retail Trade (1,363) and Health Care and Social Assistance (910) represent the top two employment categories in Alexandria. In Maxville, the top two employment categories are Health Care and Social Assistance (211) and Retail Trade (131), closely followed by Manufacturing (129) and Construction (124). This suggests a healthy environment for retail with likely higher spending in this category.

Alternate Population Forecast Scenario

As noted in the previous demographic summaries, forecast estimates currently based on Statistics Canada figures, are depicting continued negative population growth in Alexandria and Maxville.

Although there are no current growth forecasts available to suggest otherwise, this study does attempt to provide some rational growth scenarios that take into account notable new development proposals as well as the arrival of municipal water services to Maxville.

These positive directions, combined with the introduction of the High Frequency Rail corridor which has a stop in Alexandria, as well new trends for remote work and millennials' seeking out less urban locations for establishing families all point to more rational thinking for population growth forecasts, not previously considered in Statistics Canada forecast models.

Accordingly, **Table 4-5** provides three (3) population growth scenarios (Low, Moderate and High) for both Alexandria and Maxville.

Table 4-5. Revised Population Growth Forecast Scenarios - Low/Moderate/High

(Source: Manifold Data Mining Inc & FBM)

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



Attribute	Alexandria Trade Area		Maxville Trade Area	
	value	percent per year	value	percent per year
POPULATION GROWTH - REVISED LOW GROWTH SCENARIO				
Current year total population	15,166		1,982	
3-Year Projections - Total population	15,280	0.25%	1,988	0.1%
5-Year Projections - Total population	15,357	0.25%	1,992	0.1%
10-Year Projections - Total population	15,549	0.25%	2,002	0.1%
POPULATION GROWTH - REVISED MODERATE GROWTH SCENARIO				
Current year total population	15,166	0.5%	1,982	0.3%
3-Year Projections - Total population	15,395	0.5%	1,997	0.3%
5-Year Projections - Total population	15,549	0.5%	2,007	0.3%
10-Year Projections - Total population	15,942	0.5%	2,032	0.3%
POPULATION GROWTH - REVISED HIGH GROWTH SCENARIO				
Current year total population	15,166	1.0%	1,982	0.5%
3-Year Projections - Total population	15,626	1.0%	2,012	0.5%
5-Year Projections - Total population	15,940	1.0%	2,032	0.5%
10-Year Projections - Total population	16,753	1.0%	2,083	0.5%
POPULATION GROWTH - REVISED HIGH GROWTH SCENARIO				
Change in population from current forecasts to new LOW growth scenario	502		15	
Change in population from current forecasts to new MEDIUM growth scenario	895		45	
Change in population from current forecasts to new HIGH growth scenario	1,706		96	

Table 4-6. Labour Force Information

(Source: Manifold Data Mining Inc & FBM)

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
LABOUR FORCE ACTIVITY - TOTAL								
Total population 15+ years	12,416,900		13,122			1,671		
In the labour force	8,064,480	64.95%	6,980	53.19%	82	1,187	71.04%	109
Employed	7,328,310	59.02%	6,472	49.32%	84	1,088	65.07%	110
Unemployed	736,167	5.93%	507	3.87%	65	100	5.97%	101
Not in the labour force	4,352,400	35.05%	6,142	46.81%	134	484	28.96%	83
Participation rate (%)		64.95%		53.19%	82		71.04%	109
Employment rate (%)		59.02%		49.32%	84		65.07%	110
Unemployment rate (%)		9.13%		7.27%	80		8.40%	92
PLACE OF WORK								
Total employed labour force 15 years and over by place of work status	7,328,310		6,472			1,088		
At home	1,439,460	17.85%	1,373	19.68%	110	246	20.70%	116
Outside Canada	45,328	0.56%	15	0.21%	38	3	0.25%	45
No fixed workplace address	711,518	8.82%	728	10.43%	118	109	9.16%	104
Usual place of work	5,132,010	63.64%	4,356	62.41%	98	730	61.48%	97
COMMUTING DURATION								
Total employed population aged 15 years and over who commute to work	5,659,350		4,946			807		
Less than 15 minutes	1,970,080	24.43%	1,976	28.32%	116	257	21.68%	89
15 to 29 minutes	1,613,930	20.01%	1,270	18.20%	91	211	17.80%	89
30 to 44 minutes	988,783	12.26%	811	11.62%	95	155	13.09%	107
45 to 59 minutes	614,867	7.62%	497	7.12%	93	112	9.40%	123
60 minutes and over	471,699	5.85%	392	5.61%	96	71	6.01%	103
MODE OF TRANSPORTATION								
Total employed labour force 15 years and over who commute to work by mode of transportation	5,659,350		4,946			807		
Car, truck, van, as driver	4,060,840	50.36%	4,320	61.90%	123	702	59.16%	117
Car, truck, van, as passenger	351,545	4.36%	238	3.41%	78	28	2.39%	55
Public transit	802,499	9.95%	73	1.05%	11	21	1.79%	18
Walked	301,081	3.73%	195	2.80%	75	25	2.09%	56
Bicycle	75,372	0.94%	31	0.45%	48	9	0.73%	78
Other method	68,010	0.84%	88	1.26%	150	22	1.82%	217

Figure 4-6. Mode of Transportation to Work

(Source: Manifold Data Mining Inc & FBM)

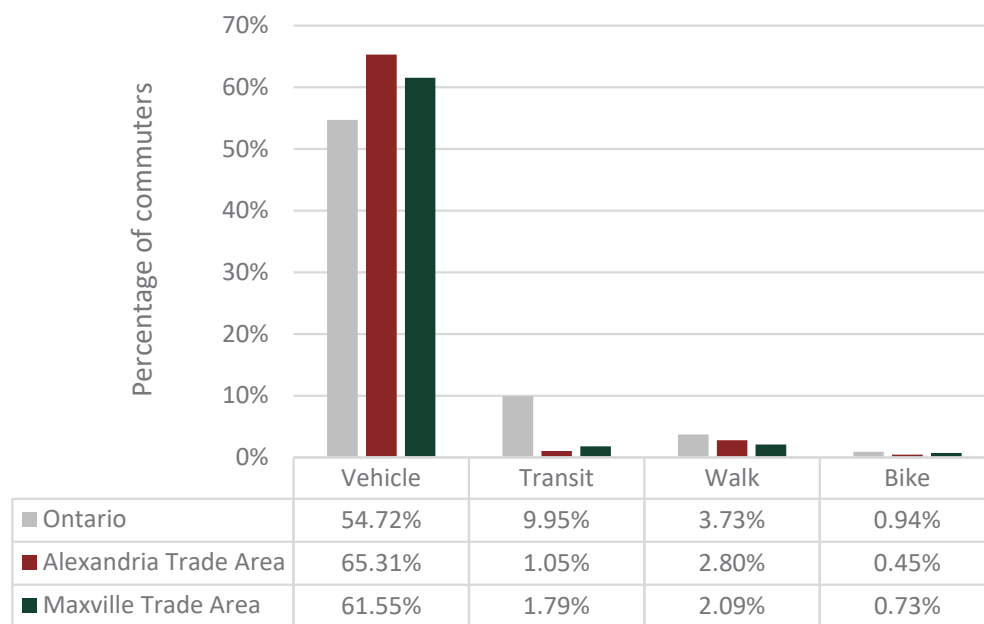


Table 4-7. Labour Force Industry and Occupation

(Source: Manifold Data Mining Inc & FBM)

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	



Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
LABOUR FORCE INDUSTRY								
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	8,064,480		6,980			1,187		
Industry - not applicable	343,153	4.26%	75	1.07%	25	0	0.00%	0
All industries	7,721,320	95.75%	6,905	98.93%	103	1,187	100.00%	104
11 Agriculture, forestry, fishing, and hunting	118,861	1.47%	265	3.80%	259	51	4.33%	295
21 Mining, quarrying, and oil and gas extraction	40,419	0.50%	14	0.21%	42	0	0.00%	0
22 Utilities	69,595	0.86%	51	0.73%	85	0	0.00%	0
23 Construction	506,432	6.28%	312	4.48%	71	124	10.48%	167
31-33 Manufacturing	750,077	9.30%	850	12.18%	131	129	10.90%	117
41 Wholesale trade	315,938	3.92%	458	6.56%	167	53	4.42%	113
44-45 Retail trade	863,803	10.71%	1,363	19.52%	182	131	11.04%	103
48-49 Transportation and warehousing	353,144	4.38%	452	6.47%	148	73	6.15%	140
51 Information and cultural industries	187,048	2.32%	34	0.48%	21	0	0.00%	0
52 Finance and insurance	461,838	5.73%	179	2.57%	45	83	6.98%	122
53 Real estate and rental and leasing	186,741	2.32%	51	0.73%	31	0	0.00%	0
54 Professional, scientific, and technical services	663,596	8.23%	444	6.36%	77	43	3.61%	44
55 Management of companies and enterprises	17,706	0.22%	16	0.23%	105	0	0.00%	0
56 Administrative and support, waste management and remediation services	357,540	4.43%	160	2.30%	52	49	4.16%	94
61 Educational services	613,506	7.61%	195	2.79%	37	0	0.01%	0
62 Health care and social assistance	835,061	10.36%	910	13.04%	126	211	17.77%	172
71 Arts, entertainment, and recreation	158,129	1.96%	61	0.88%	45	46	3.87%	197
72 Accommodation and food services	430,367	5.34%	340	4.88%	91	42	3.57%	67
81 Other services (except public administration)	317,074	3.93%	509	7.30%	186	98	8.25%	210
91 Public administration	474,450	5.88%	240	3.44%	59	53	4.44%	76
OCCUPATION								
Total labour force 15 years and over by occupation	8,064,480		6,980			1,187		
Occupation - not applicable	343,153	4.26%	75	1.07%	25	0	0.00%	0
All occupations	7,721,320	95.75%	6,905	98.93%	103	1,187	100.00%	104
0 Management occupations	914,818	11.34%	935	13.40%	118	157	13.25%	117
1 Business, finance, and administration occupations	1,302,860	16.16%	991	14.20%	88	132	11.12%	69
2 Natural and applied sciences and related occupations	625,194	7.75%	405	5.80%	75	46	3.86%	50
3 Health occupations	519,714	6.44%	525	7.52%	117	105	8.84%	137
4 Occupations in education, law and social, community and government services	994,518	12.33%	666	9.54%	77	109	9.21%	75
5 Occupations in art, culture, recreation, and sport	232,438	2.88%	32	0.46%	16	0	0.00%	0
6 Sales and service occupations	1,643,380	20.38%	1,526	21.86%	107	208	17.52%	86
7 Trades, transport and equipment operators and related occupations	983,586	12.20%	1,285	18.41%	151	314	26.46%	217
8 Natural resources, agriculture, and related production occupations	128,639	1.60%	145	2.08%	130	69	5.84%	365
9 Occupations in manufacturing and utilities	376,174	4.67%	395	5.66%	121	46	3.89%	83

Applying growth rates for Alexandria ranging from 0.25% per year (Low) to 0.5% per year (Moderate), to 1.0% per year (High) suggest that Alexandria's Trade Area could grow by as much as 1,700 new residents over the next decade.

Using a similar approach for Maxville, but applying annual rates of 0.1%, 0.3% and 0.5% yields a future growth of almost 100 residents over the next decade.

On the surface, these may not seem like robust growth rates, but they are a divergence from historic patterns of decline and could be realistically met or even exceeded given the many attributes that North Glengarry has at its doorstep.

For the purposes of this study, the current forecasts are used so as to establish a conservative baseline. Doing so will mean that any growth above and beyond the forecasts presented in this study will be an added bonus for the community and the corresponding opportunities.

4.4 Retail Spending Profile

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. The data was further consolidated into 22 specific spending categories in order to build a spending profile for the Trade Areas, which has been indexed against the Ontario average for the same.

These spending categories, as shown in **Table 4-8** include:

- » Grocery & Convenience
- » Pharmacy
- » Alcohol & Tobacco
- » Personal Services
- » *Health Care & Medical Services*
- » Fashion & Accessories
- » Jewelry
- » Health & Beauty
- » Home Furniture & Décor
- » Appliances & Electronics
- » Home Improvement & Gardening
- » Books & Media
- » Sporting Goods
- » Toys & Hobbies
- » Specialty Retail
- » Quick Service Food & Beverage
- » Restaurants & Pubs
- » Arts & Entertainment
- » Fitness & Leisure
- » Auto Parts & Accessories

- » Auto/RV/Motorsports Dealerships
- » *Auto Fuel*

Having established the respective Trade Area boundaries, population and demographic profile, the size of the retail market and its anticipated growth was projected using retail spending data from Manifold Data Mining. The task involved developing an understanding of how the Trade Area residents spend their shopping and leisure dollars on a household basis for each of the 22 categories.

While categories such as *Health Care & Medical Services* as well as *Auto Fuel* have an associated household expenditure, they are only included in the spending profile and not quantified in the overall demand. Health Care & Medical Services do not have a typical productivity associated with them for forecasting space since a large component of the business model is not a traditional fee-for-service or fee-for-product model and involves direct insurance payment. Auto Fuel, on the other hand is also highly volatile in terms of pricing, which is often a component of quantifying demand and productivity along with an understanding of the number of pumps, vehicles and litres sold as well as the fact that taxes vary from region to region.

Alexandria

Alexandria's Trade Area spending is estimated at \$167 million (2021 year-end estimate), as shown in **Table 4-8**. If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Alexandria's Trade Area is \$130 million.

Each of the major categories of spending (Grocery & Convenience, Comparison Merchandise, Restaurants & Entertainment, and Auto/RV/Motorsports Parts & Sales) then aggregated as shown in **Figure 4-7**. This visually shows the importance that Grocery & Convenience spending plays for Alexandria's resident base, but also shows a significant amount of Comparison Merchandise Spending, a large share of which is likely not being captured in Alexandria, based on the current inventory and merchandise offering.

By 2031 (**Table 4-9**), based on conservative forecasts for population growth, the Alexandria Trade Area spending potential could increase by \$20 million to \$150 million, excluding Health Care and Auto categories.

Maxville

Maxville's more localized Trade Area spending is estimated at \$31million (2021 year-end estimate), as shown in **Table 4-8**. If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Maxville's Trade Area is \$24 million.

Grocery & Convenience spending by local Maxville residents is approximately \$11 million, which is almost all leaving the community for Alexandria. A reasonable amount could be retained with a small grocery component in Maxville.

By 2031 (**Table 4-9**), based on conservative forecasts for population growth, the Maxville Trade Area spending potential could increase by \$5 million to \$29 million, excluding Health Care and Auto categories.

Secondary Trade Area (STA)

The STA comprising largely the Rigaud area represents a further \$106 million retail market (excluding Health Care and Auto categories). It would be reasonable that Alexandria could tap into some of this market, though it would be expected to be less frequent than the existing Alexandria Trade Area.

By 2031 (**Table 4-9**), based on conservative forecasts

for population growth, the Secondary Trade Area spending potential could increase by \$24 million to \$130 million, excluding Health Care and Auto categories.

Miscellaneous Inflow Spending

Another factor worth considering for North Glengarry, and in particular for Alexandria is the role that miscellaneous inflow has on the market. Alexandria is the beneficiary of having a regional medical centre/hospital as well as a regional indoor recreational facility (Tim Hortons Dome), in addition to having a highly traveled corridor through its commercial spine. These all-important assets mean that Alexandria attracts less frequent, but nonetheless important potential customer spending from areas outside of the identified Trade Areas.

Consequently, estimates of the inflow were applied to the various spending categories and determined that conservatively (at 5%), miscellaneous inflow could generate an additional \$9 million in retail spending to the community.

Spending categories that are typically attractive to these outlying, less frequent miscellaneous segments would be Quick Service F&B, Personal Services, Grocery or Pharmacy, though other categories may also benefit from "impulse" purchases.

Figure 4-7. Trade Area Retail Spending Potential 2021

(Source: Manifold Data Mining Inc & FBM)

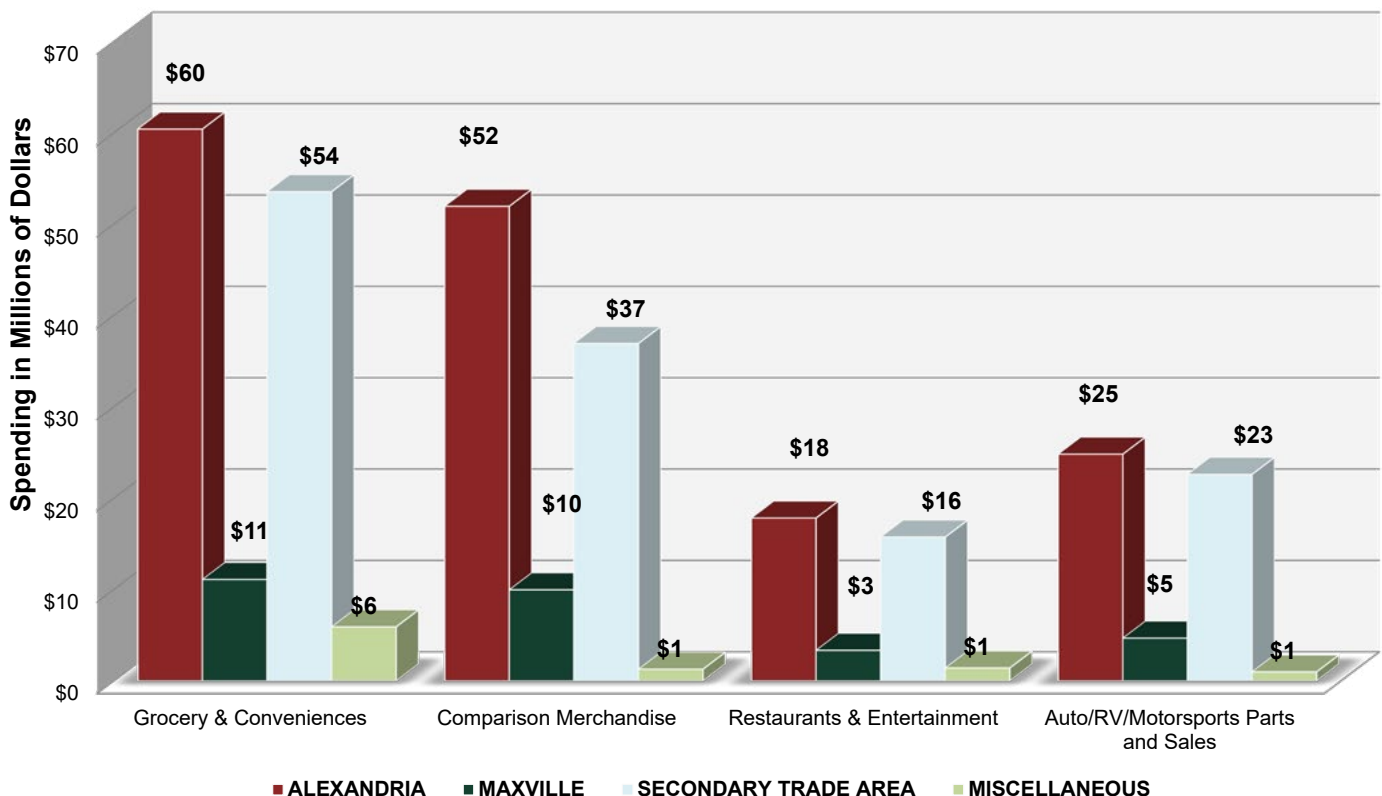


Table 4-8. Trade Area Retail Spending Potential 2021

(Source: Manifold Data Mining Inc & FBM)



Retail Spending by Merchandise Category		2021		2021		2021		2021	
		ALEXANDRIA TRADE AREA Per Household Retail Spending	ALEXANDRIA TRADE AREA Aggregate Retail Spending	MAXVILLE TRADE AREA Per Household Retail Spending	MAXVILLE TRADE AREA Aggregate Retail Spending	SECONDARY TRADE AREA Per Household Retail Spending	SECONDARY TRADE AREA Aggregate Retail Spending	Misc Inflow Factor	Alexandria Maxville Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$7,056	\$38,838,227	\$8,046	\$7,088,228	\$9,502	\$35,026,134	10.0%	\$4,592,646
	Pharmacy	\$710	\$3,906,362	\$745	\$656,731	\$816	\$3,009,043	10.0%	\$456,309
	Alcohol & Tobacco	\$1,108	\$6,098,049	\$1,219	\$1,074,337	\$1,839	\$6,776,801	2.5%	\$179,310
	Personal Services	\$2,103	\$11,577,191	\$2,597	\$2,288,318	\$2,374	\$8,750,223	5.0%	\$693,275
	Health Care & Medical Services	\$440	\$2,423,532	\$496	\$436,636	\$634	\$2,335,423	10.0%	\$286,017
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$1,690	\$9,299,626	\$2,150	\$1,894,470	\$2,078	\$7,659,850	1.0%	\$111,941
	Jewelry	\$135	\$744,628	\$177	\$155,836	\$110	\$406,469	0.5%	\$4,502
	Beauty & Personal Care	\$633	\$3,484,060	\$757	\$667,124	\$679	\$2,503,804	5.0%	\$207,559
	Home Furniture & Décor	\$847	\$4,663,974	\$993	\$874,686	\$848	\$3,124,398	2.5%	\$138,466
	Appliances & Electronics	\$1,319	\$7,260,009	\$1,546	\$1,362,009	\$1,475	\$5,436,821	1.0%	\$86,220
	Home Improvement & Gardening	\$2,822	\$15,530,571	\$3,006	\$2,648,013	\$2,690	\$9,917,109	2.5%	\$454,465
	Books & Media	\$688	\$3,789,504	\$1,099	\$968,360	\$829	\$3,054,635	0.0%	\$0
	Sporting Goods	\$204	\$1,121,059	\$279	\$245,802	\$244	\$899,219	0.0%	\$0
	Toys & Hobbies	\$239	\$1,315,029	\$294	\$259,352	\$218	\$804,659	0.0%	\$0
	Specialty Retail	\$864	\$4,755,719	\$1,019	\$897,885	\$852	\$3,139,924	5.0%	\$282,680
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$1,474	\$8,114,487	\$1,679	\$1,479,627	\$2,331	\$8,592,014	10.0%	\$959,411
	Restaurants & Pubs	\$1,367	\$7,523,429	\$1,608	\$1,416,970	\$1,545	\$5,693,204	5.0%	\$447,020
	Arts & Entertainment	\$124	\$680,414	\$162	\$142,589	\$132	\$485,707	1.0%	\$8,230
	Fitness & Leisure	\$275	\$1,515,499	\$354	\$311,713	\$264	\$973,882	0.0%	\$0
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$1,542	\$8,487,438	\$1,905	\$1,678,158	\$1,780	\$6,560,114	5.0%	\$508,280
	Auto/RV/Motorsports Dealership	\$2,969	\$16,338,982	\$3,412	\$3,005,589	\$4,354	\$16,049,360	2.5%	\$483,614
	Auto Fuel	\$1,643	\$9,041,311	\$2,007	\$1,768,555	\$2,041	\$7,522,499	5.0%	\$540,493
TOTAL CATEGORIES		\$30,252	\$166,509,098	\$35,552	\$31,320,986	\$37,635	\$138,721,291	5.3%	\$10,440,439
TOTAL (excluding Health Care & Auto)		\$23,659	\$130,217,835	\$27,732	\$24,432,050	\$28,826	\$106,253,895		\$8,622,035

Table 4-9. Trade Area Retail Spending Potential 2031

(Source: Manifold Data Mining Inc & FBM)



Retail Spending by Merchandise Category		2031		2031		2031		2031	
		ALEXANDRIA TRADE AREA Per Household Retail Spending	ALEXANDRIA TRADE AREA Aggregate Retail Spending	MAXVILLE TRADE AREA Per Household Retail Spending	MAXVILLE TRADE AREA Aggregate Retail Spending	SECONDARY TRADE AREA Per Household Retail Spending	SECONDARY TRADE AREA Aggregate Retail Spending	Misc Inflow Factor	Alexandria Maxville Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$7,795	\$44,725,505	\$8,887	\$8,274,185	\$10,497	\$42,910,295	10.0%	\$5,299,969
	Pharmacy	\$784	\$4,498,507	\$823	\$766,611	\$902	\$3,686,360	10.0%	\$526,512
	Alcohol & Tobacco	\$1,224	\$7,022,419	\$1,347	\$1,254,088	\$2,031	\$8,302,215	2.5%	\$206,913
	Personal Services	\$2,323	\$13,332,115	\$2,869	\$2,671,184	\$2,622	\$10,719,843	5.0%	\$800,165
	Health Care & Medical Services	\$486	\$2,790,903	\$547	\$509,691	\$700	\$2,861,112	10.0%	\$330,059
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$1,866	\$10,709,306	\$2,375	\$2,211,440	\$2,296	\$9,384,034	1.0%	\$129,207
	Jewelry	\$149	\$857,502	\$195	\$181,910	\$122	\$497,962	0.5%	\$5,197
	Beauty & Personal Care	\$699	\$4,012,189	\$836	\$778,743	\$750	\$3,067,394	5.0%	\$239,547
	Home Furniture & Décor	\$936	\$5,370,961	\$1,097	\$1,021,032	\$936	\$3,827,680	2.5%	\$159,800
	Appliances & Electronics	\$1,457	\$8,360,515	\$1,708	\$1,589,891	\$1,629	\$6,660,614	1.0%	\$99,504
	Home Improvement & Gardening	\$3,117	\$17,884,766	\$3,320	\$3,091,061	\$2,972	\$12,149,387	2.5%	\$524,396
	Books & Media	\$761	\$4,363,934	\$1,214	\$1,130,380	\$915	\$3,742,214	0.0%	\$0
	Sporting Goods	\$225	\$1,290,994	\$308	\$286,928	\$269	\$1,101,628	0.0%	\$0
	Toys & Hobbies	\$264	\$1,514,367	\$325	\$302,745	\$241	\$985,783	0.0%	\$0
	Specialty Retail	\$954	\$5,476,613	\$1,126	\$1,048,113	\$941	\$3,846,701	5.0%	\$326,236
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$1,629	\$9,344,518	\$1,855	\$1,727,189	\$2,575	\$10,526,022	10.0%	\$1,107,171
	Restaurants & Pubs	\$1,510	\$8,663,865	\$1,777	\$1,654,049	\$1,706	\$6,974,708	5.0%	\$515,896
	Arts & Entertainment	\$137	\$783,554	\$179	\$166,447	\$146	\$595,037	1.0%	\$9,500
	Fitness & Leisure	\$304	\$1,745,225	\$391	\$363,867	\$292	\$1,193,096	0.0%	\$0
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$1,703	\$9,774,003	\$2,104	\$1,958,936	\$1,966	\$8,036,754	5.0%	\$586,647
	Auto/RV/Motorsports Dealership	\$3,279	\$18,815,720	\$3,768	\$3,508,464	\$4,810	\$19,661,969	2.5%	\$558,105
	Auto Fuel	\$1,815	\$10,411,834	\$2,217	\$2,064,458	\$2,254	\$9,215,766	5.0%	\$623,815
TOTAL CATEGORIES		\$33,417	\$191,749,316	\$39,271	\$36,561,410	\$41,572	\$169,946,575	5.3%	\$12,048,637
TOTAL (excluding Auto)		\$26,134	\$149,956,856	\$30,634	\$28,519,862	\$31,842	\$130,170,973		\$9,950,012

5.0 Commercial Supply

5.1 Introduction

The dynamics of the overall commercial market comprising retail and food & beverage shops and services, and street level office services provide critical indicators as to the performance of the Alexandria and Maxville's commercial sectors and moreover the magnitude of demand and resulting opportunity for which certain market segments or gaps could be filled.

This section will provide a detailed inventory of the business mix (predominantly ground floor) that comprise the current commercial market for Alexandria and Maxville, which serves as the core centrality for shops and services in the identified Trade Area.

The purpose of the inventory and evaluation is to identify a foundation for demand and current retail performance (also known as retail sales productivity) followed by identifying the potential types of tenants and/or merchandise categories for whom Alexandria and Maxville could be considered a compatible market for expansion or attraction.

5.2 Market Overview

To document the retail inventory, FBM conducted on-the-ground fieldwork in which streetfront retail premises were documented in terms of the retail store, merchandise category, estimated unit size, vacancy as well as North American Industry Classification System (NAICS) code.

The inventory was categorized into the same merchandise categories that were profiled in the retail spending so that a direct comparison could be taken. In some cases where retail data was not available, and store sizes were estimated using leasing plans, brokerage websites and satellite mapping measurements.

While there is some inventory near to Alexandria in Green Valley comprised of Roy's Chevy, RV Spot and Alexandria Camping Centre, the inventory of these is not part of the overall Alexandria/Maxville inventory. This is not to suggest that they don't play an important role for attracting customers to the region, but for the purposes of this North Glengarry-specific profile, they are not included in the analysis.

5.3 Overall Inventory Summary

The full retail and business mix inventory for Alexandria, including Maxville, is summarized in **Table 5-1** and **Figure 5-1**.

The summary of the combined Alexandria and Maxville inventory illustrates a total commercial floorspace of 599,504 sf. This latter floorspace includes Professional & Financial Services and Medical & Wellness Services. When excluding the latter, the floorspace combined equates to 412,967 sf. If further removing automotive categories, the "retail only" inventory equates to 347,742 sf.

5.4 Overall Retail Inventory By Category

Table 5-1 and **Figure 5-1** provides a breakdown of Alexandria and Maxville's retail inventory by category.

The Top 5 retail categories (excluding Professional & Financial Services and Auto) in terms of overall retail floor space are:

1. Grocery & Specialty Foods	81,455 sf
2. Home Improvement & Garden	73,288 sf
3. Full Service Restaurants	24,938 sf
4. Specialty Retail	23,862 sf
5. Limited Service F&B	20,462 sf

Alexandria has a limited retail offering within the Comparison or Department Store Type Merchandise Categories (DSTM), which could set the stage for a format such as Walmart and/or Marks (a subsidiary of Canadian Tire), which is among the reasons shoppers currently shop in Cornwall, or why residents in the Secondary Trade Area in Rigaud shop in Hawkesbury, when Alexandria would be just as, if not more convenient.

While there may be opportunities to strategically add to this inventory or worth pursuing in certain circumstances, it is important that they be located at sites that are compatible and beneficial to the community as a whole and the downtown specifically, and where lands are available, such as in the south part of the community.

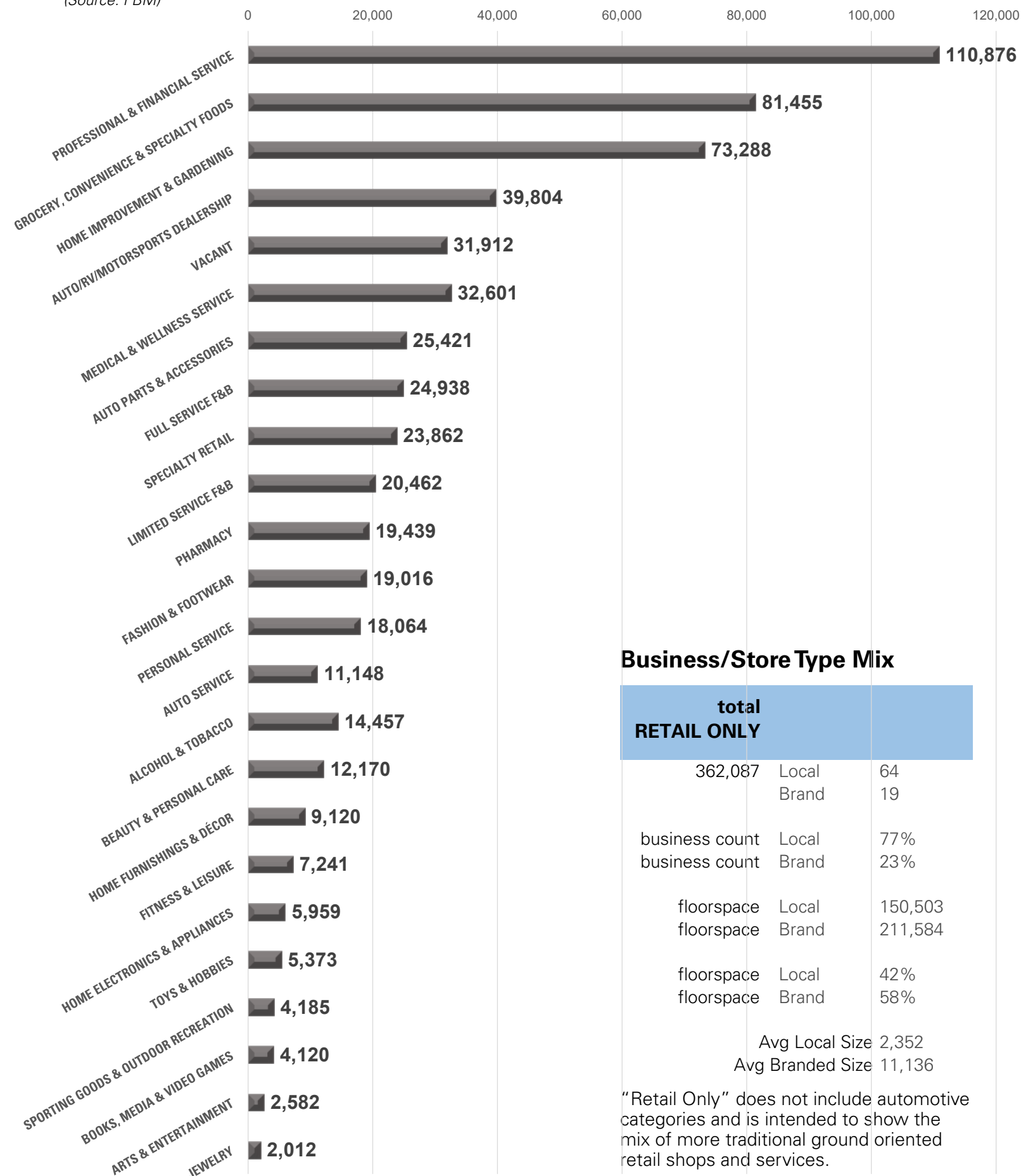
Table 5-1. Alexandria & Maxville Combined Commercial Inventory Total

(Source: Manifold Data Mining Inc & FBM)

RETAIL MERCHANDISE or BUSINESS CATEGORY	ALL NODES FLOORSPACE (sq. ft.)	ALL NODES FLOORSPACE MIX (%)
PROFESSIONAL & FINANCIAL SERVICE	110,876	18.5%
GROCERY, CONVENIENCE & SPECIALTY FOODS	81,455	13.6%
HOME IMPROVEMENT & GARDENING	73,288	12.2%
AUTO/RV/MOTORSPORTS DEALERSHIP	39,804	6.6%
VACANT	31,912	5.3%
MEDICAL & WELLNESS SERVICE	32,601	5.4%
AUTO PARTS & ACCESSORIES	25,421	4.2%
FULL SERVICE F&B	24,938	4.2%
SPECIALTY RETAIL	23,862	4.0%
LIMITED SERVICE F&B	20,462	3.4%
PHARMACY	19,439	3.2%
FASHION & FOOTWEAR	19,016	3.2%
PERSONAL SERVICE	18,064	3.0%
AUTO SERVICE	11,148	1.9%
ALCOHOL & TOBACCO	14,457	2.4%
BEAUTY & PERSONAL CARE	12,170	2.0%
HOME FURNISHINGS & DÉCOR	9,120	1.5%
FITNESS & LEISURE	7,241	1.2%
HOME ELECTRONICS & APPLIANCES	5,959	1.0%
TOYS & HOBBIES	5,373	0.9%
SPORTING GOODS & OUTDOOR RECREATION	4,185	0.7%
BOOKS, MEDIA & VIDEO GAMES	4,120	0.7%
ARTS & ENTERTAINMENT	2,582	0.4%
JEWELRY	2,012	0.3%
TOTAL	599,504	
Retail Floorspace (excluding Medical & Wellness, Professional Services & Vacant)	412,967	

Figure 5-1. Alexandria & Maxville Combined Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)



Business/Store Type Mix

total RETAIL ONLY			
362,087	Local	64	
	Brand	19	
business count	Local	77%	
business count	Brand	23%	
floorspace	Local	150,503	
floorspace	Brand	211,584	
floorspace	Local	42%	
floorspace	Brand	58%	
Avg Local Size 2,352			
Avg Branded Size 11,136			
"Retail Only" does not include automotive categories and is intended to show the mix of more traditional ground oriented retail shops and services.			

5.5 Overall Retail Vacancy

A review of the current vacancy and nature of the vacancies provides additional cues for prospective business interests in the community. The current overall vacancy rate is estimated at 5.3% which is in line with what is traditionally considered as healthy for retail vacancy (4% - 5%).

The current clusters of vacancies are located in Alexandria's downtown and average in the range of 1,500 to 2,500 sf. Aside from downtown, the southern area of Alexandria with more traditional retail continues to perform at a healthy level, with the only vacancies located in tucked away, or less than prime retail, thus likely opportunities for local businesses, who may be looking for less expensive spaces.

Maxville's vacancy is very low, which is a key to setting the stage for new infill development to accommodate new locally-serving independent retailers

In looking to manage vacancies, and as the community prepares for growth, any new development should be very targeted for uses that have the ability to create benefit for the greater community good rather than impacting existing businesses.

As noted, retail opportunities exist for new-to-market tenants, but these spaces don't currently exist, as they are predominantly going to be larger, or have specific needs such as pad sites or drive through capability, with surface parking. As it has been through the CIP program, Alexandria and Maxville's main street areas should continue to be a marketing priority for attracting local businesses as well as finding opportunities for small infill development along Main Street.

Overall, vacancy is not a significant concern, but equally speaking succession planning for existing family business should be encouraged as an opportunity where it is often the case in smaller markets that businesses and buildings tend to be for sale rather than particular spaces for lease.

5.6 Retail Space Per Capita

Utilizing data from FBM's extensive retail inventory tabulation in conjunction with Demographic Data provided by Statistics Canada and Manifold Data Mining Inc., the approximate retail space per capita ratio has been estimated for Alexandria/Maxville's retail market.

As a starting point, **Figure 5-2** depicts the Target Retail Space Per Capita, which provides a baseline for determining how much retail per capita is best suited to a community, according to its population size.

How much retail a community is able to support is crucial for determining future land use plans: a local government wants to have as much evidence as possible to demonstrate to potential retailers the opportunity and untapped potential in their community. Per Capita ratios can also be used as a methodology to gauge future demand, if and as population growth occurs.

In predominantly rural areas in and around North Glengarry, Alexandria is a shopping locale for not only the residents, but a larger area, that could reach Rigaud or even Lancaster.

The current retail space per capita, as calculated by FBM takes into account a trade area beyond simply Alexandria's geopolitical boundary, by using a drive time analysis and other criteria to form the retail trade (as noted previously).

Figure 5-2 is meant to illustrate a general indication of retail opportunity and representation for communities, with an understanding that some variations do exist.

Many location specific factors contribute to an areas overall retail market, and cannot be addressed in a general chart or graph. Such locational factors can include specialized demands of a community, or unique characteristics that warrant certain retail traits. Aside from unique locational factors that each retail trade area has, **Figure 5-2** provides beneficial direction and insight for communities to consider when trying to understand the opportunities of their retail market.

Retail space per capita is an industry measure of the ratio of retail space against a city/town's population. An examination of retail space per capita provides a general indication of whether a market is under-retailed or over-retailed.

In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita is in the range of 30 sf to 40 sf¹.

This figure can be misleading however as this accounts for organized shopping center space only in centers larger than 10,000 sf. Therefore, when factoring in all retail including street front retail, urban markets can be higher than this figure.

¹ International Council of Shopping Centres

Figure 5-2. Alexandria & Maxville Retail Space Per Capita
 (Source: FBM)



The township’s per capita retail ratio 27.2 sf. This figure is calculated by dividing the retail inventory (412,967 sf) by the trade area population (15,166). Therefore 412,967 / 15,166 = 27.2 Sf per capita.

An appropriate target for the township’s trade area should be in the range of 25 to 35 sf per capita, which is exactly where it is situated today. This means the current retail inventory relative to the trade area it serves is largely balanced, but there are signs for growth.

It also means that rural markets, since they don't have the same type of retail infrastructure need to factor all space into their equation, since they are predominantly main street and multiple property owner/business owner driven.

Using **Figure 5-2** as a benchmark for retail space in communities and for a comparable market like Alexandria which is more rural and reaches a wider area given the more remote nature, this figure should fall in the 25 to 35 sf per capita range.

Accordingly, the estimated retail space per capita ratio for Alexandria/Maxville and its 15,166 person retail trade area is in the range of 27.2 sf/capita if not including non-retail street front space like Medical & Wellness and Professional & Financial Services.

The per capita figure illustrates that the inventory for Alexandria is not just a local market. Rather Alexandria has a wider appeal that in reality serves beyond its regular 15,00 person market, but as shown in the Trade Area profile including the Secondary Trade Area is actually feasibly in line with a 20,000 to 25,000 person trade area.

Alexandria should continue to maintain a target retail space per capita ratio of 25 to 30 sf/capita, as this would ensure a stable growth into the future, without necessarily creating an over-retailed environment where vacancies could become more of an issue.

The retail inventory in terms of floor space and vacancies suggest that demand may not be robust, but that Alexandria should be very targeted in its approach to obtaining the most compatible retail businesses to fit within existing vacant spaces or land fronting or visible to Route 34/main street's southern gateway to the community (approximately 10 acres), or potentially the north end of town, albeit at a smaller development scale (less than 5 acres).

Alexandria's downtown will be susceptible to future retail growth in the periphery and with current vacancies levels in the downtown caution should be exercised to make sure that businesses and vacancies in the downtown are promoted to best degree possible.

This is yet another reason that the Township of North Glengarry should review its current allocation and locations for future commercial land to make sure that development is directed in the most appropriate areas in terms of scale and possible impact.

Much of the future demand and tenant prospects are likely to be of a branded nature and by virtue of their site selection requirements, they will be looking for tenant ready spaces or new development.

Per capita is a typical rule-of-thumb benchmark, but locational contexts do play a role. The Ottawa and Cornwall markets have a significant impact on retail within an approximate 1 to 2 hour drive whereby major bigger ticket branded retailers typically know their consumers will travel up to 2 hours for goods not available in their community.

5.6 Alexandria Summary

Alexandria, as its own market has been documented and profiled and has a total ground level retail inventory (**Figure 5-3 to 5-9, and Table 5-2 and 5-3**) of approximately 575,662 sf. If excluding Medical & Wellness, Professional Services & Vacant space from this inventory, the net occupied retail inventory in Alexandria is 411,4910 sf or 71.5% of the total floorspace.

In total, Alexandria's "retail only" storefronts comprise a business mix by store count of 78% local to 22% branded. When examining this same business mix by floorspace, the ratio works out to 42% local to 58% branded. This difference is attributed to the fact that many of the branded stores in Alexandria are a larger size, such as Canadian Tire, Independent Grocery (even though locally franchised), Giant Tiger, and Home Hardware (even though locally franchised)

On the following pages, Alexandria's North and South nodes are detailed and profiled visually.

Alexandria		
331,328	Local	58
	Brand	16
business count	Local	78%
business count	Brand	22%
floorspace	Local	140,432
floorspace	Brand	190,896
floorspace	Local	42%
floorspace	Brand	58%

Avg Local Size 2,421
Avg Branded Size 11,931

Figure 5-3. Alexandria North Node Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)

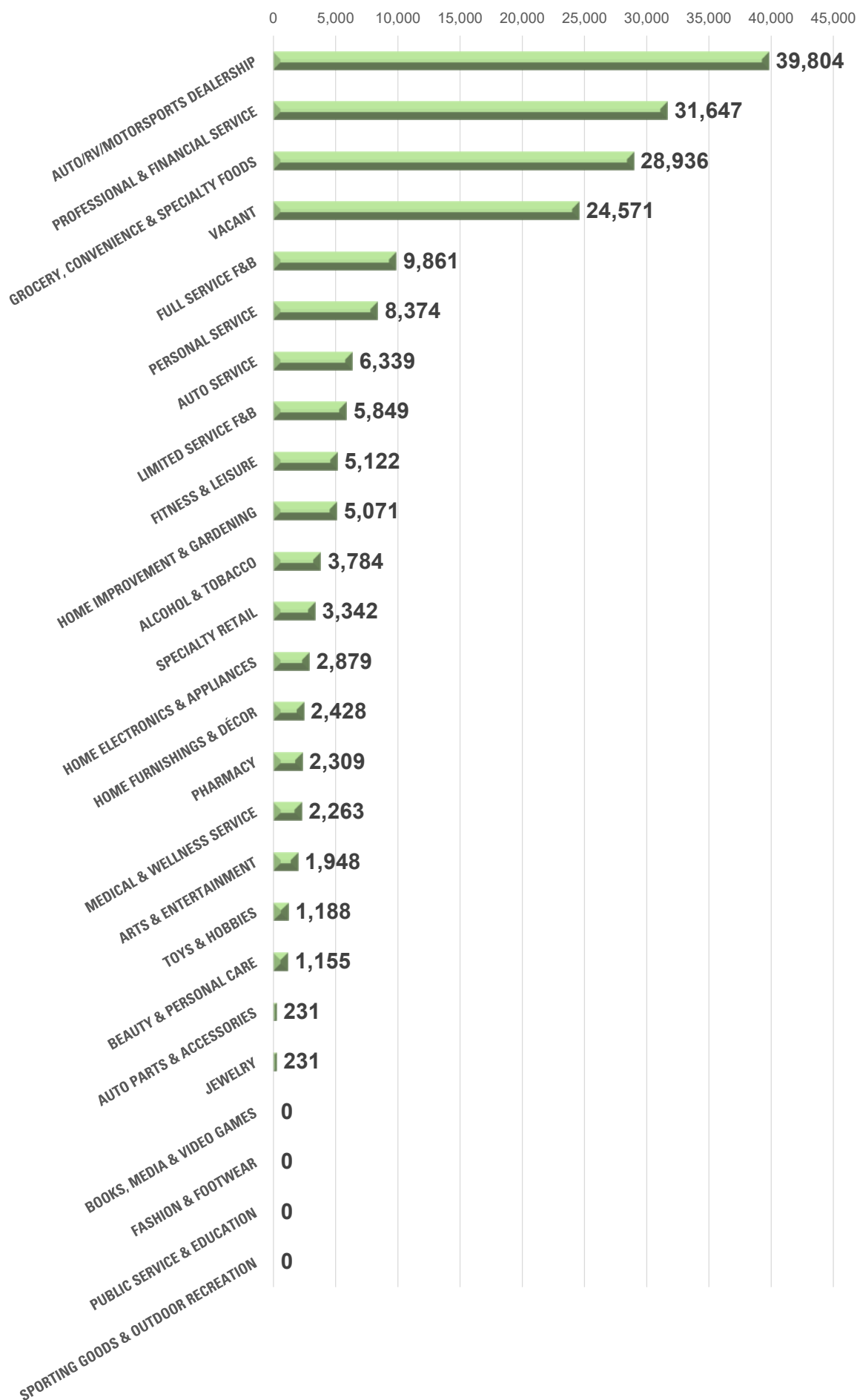


Table 5-2. Alexandria North Commercial Inventory

(Source: Manifold Data Mining Inc & FBM)

MERCHANDISE CATEGORY	ALEXANDRIA NORTH FLOORSPACE (sq. ft.)	ALEXANDRIA NORTH MIX (%)
AUTO/RV/MOTORSPORTS DEALERSHIP	39,804	21.2%
PROFESSIONAL & FINANCIAL SERVICE	31,647	16.9%
GROCERY, CONVENIENCE & SPECIALTY FOODS	28,936	15.4%
VACANT	24,571	13.1%
FULL SERVICE F&B	9,861	5.3%
PERSONAL SERVICE	8,374	4.5%
AUTO SERVICE	6,339	3.4%
LIMITED SERVICE F&B	5,849	3.1%
FITNESS & LEISURE	5,122	2.7%
HOME IMPROVEMENT & GARDENING	5,071	2.7%
ALCOHOL & TOBACCO	3,784	2.0%
SPECIALTY RETAIL	3,342	1.8%
HOME ELECTRONICS & APPLIANCES	2,879	1.5%
HOME FURNISHINGS & DÉCOR	2,428	1.3%
PHARMACY	2,309	1.2%
MEDICAL & WELLNESS SERVICE	2,263	1.2%
ARTS & ENTERTAINMENT	1,948	1.0%
TOYS & HOBBIES	1,188	0.6%
BEAUTY & PERSONAL CARE	1,155	0.6%
AUTO PARTS & ACCESSORIES	231	0.1%
JEWELRY	231	0.1%
BOOKS, MEDIA & VIDEO GAMES	0	0.0%
FASHION & FOOTWEAR	0	0.0%
PUBLIC SERVICE & EDUCATION	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%

TOTAL	187,329	
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Retail Floorspace (excluding Medical & Wellness, Professional Services & Vacant)

122,510

65%

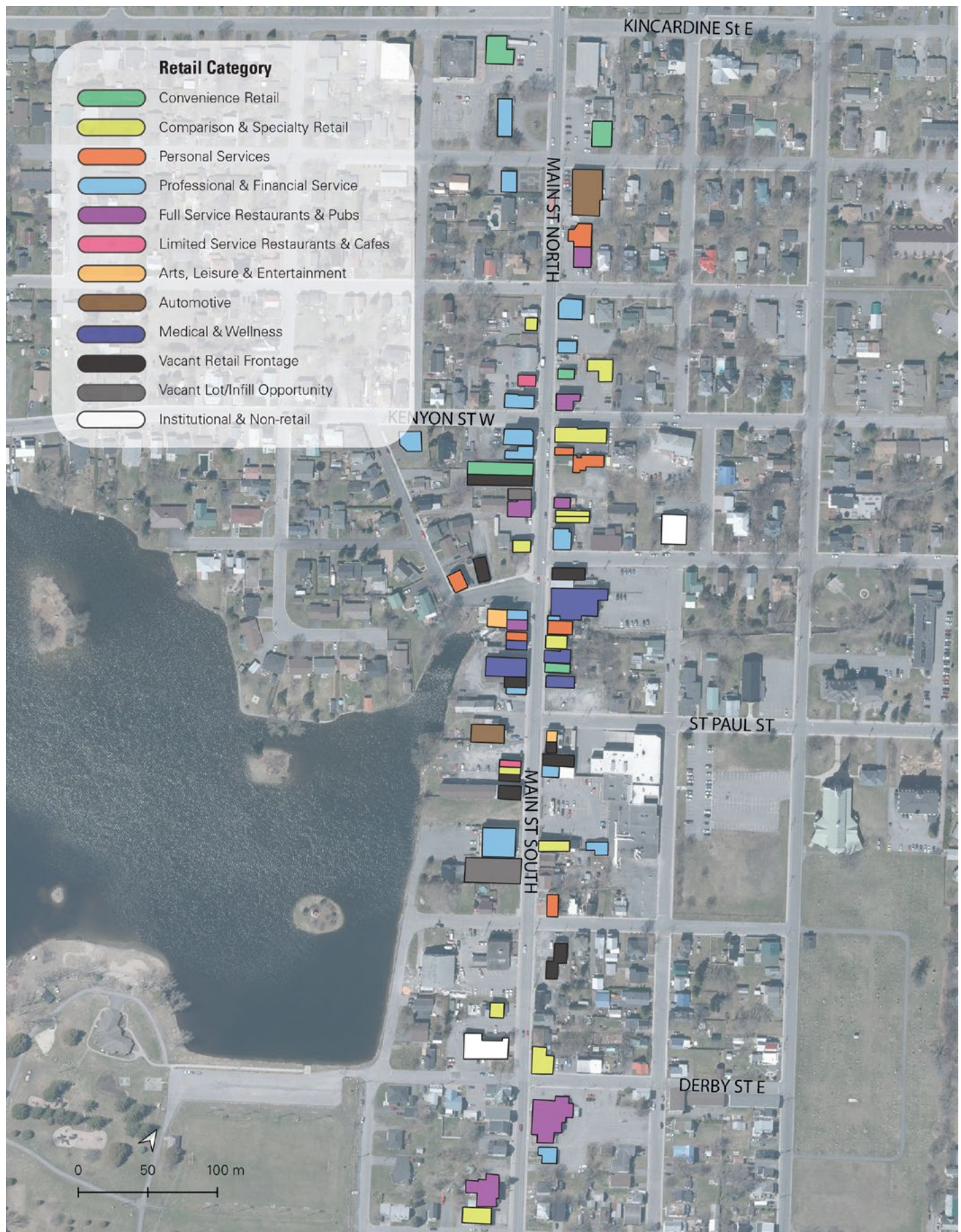
Figure 5-4. Alexandria Main Street (North 1) Retail Inventory

(Source: FBM with imagery from DRAPE 2019-2020 Orthos - Includes Material © 2019 Of The Queen’s Printer For Ontario. All Rights Reserved)



Figure 5-5. Alexandria Main Street (North 2) Retail Inventory

(Source: FBM with imagery from DRAPE 2019-2020 Orthos - Includes Material © 2019 Of The Queen's Printer For Ontario. All Rights Reserved)



5.6.1 Alexandria North Node

Alexandria's North node is broken into 2 areas in **Figure 5-4** and **Figure 5-5**. The first area in **Figure 5-4** (referred to as North 1) includes the area north of Kincardine St to Power Dam Road at the Alexandria Moulding Plant. The second area in **Figure 5-5** (referred to as North 2) comprises the downtown area and extends from Kincardine St to Lochiel St.

Inventory

The inventory overall for the Alexandria North area, which is largely dominated by the downtown, as detailed in **Table 5-2** reveals the following Top 3 business mix categories:

1. *Auto/RV/Motorports Dealerships* 39,804 sf
2. *Professional & Financial Services* 31,647 sf
3. *Grocery & Specialty Foods* 28,936 sf

Vacancy

The Alexandria North retail vacancy sits at a high 13.1% (24,571 sf), allocated across a number of smaller downtown vacant spaces. Notable vacancies in the Alexandria North node include:

- » 2 Center St (formerly the Quirky Carrot) in which vacancy reflects 2 levels of the building.
- » 24 Main St N
- » 11 Mill Square (opposite Priest's Mill Arts Centre)
- » 26 Main St S in which the Alexandria Community Market currently provides a temporary weekend pop-up space for local home-based businesses)
- » 89 Main St S
- » 49 Main St S
- » 54 Main St S
- » 58 Main St S

Opportunities for infill development along Main Street in the Alexandria North Node include:

- » Potential commercial development land opposite Alexandria Moulding.
- » Between 16-24 Main St S (currently hidden by mural beside Pharmasave) (~0.07ac)
- » A small 0.2ac parcel south of Fauxmagerie Zengarry.

Overall Retail Sales Productivity Estimates

Initial estimates of the inventory in terms of mix, quality and offering suggests that the productivity is estimated to be in the range of \$210 to \$220 per sf. Typical rural main street areas with a similar context to the Alexandria North node could be expected to perform in a similar range.

5.6.2 Alexandria South Node

Alexandria's South node is illustrated in **Figure 5-7**. The Alexandria South node is defined as being from Lochiel St to the intersection of Route 45 where the Home Hardware and Alexandria Tire are located. The south node is influenced to some degree by the small cluster of Auto/RV dealerships in nearby Green Valley (Roy's Chevrolet, RV Spot and Alexandria Camping Centre).

Inventory

The inventory overall for the Alexandria South area, which is the predominant highway commercial retail area, as detailed in **Table 5-3** reveals the following Top 3 business mix categories:

1. *Home Improvement & Gardening* 55,602 sf
2. *Professional & Financial Services* 54,066 sf
3. *Grocery & Specialty Foods* 51,951 sf

Vacancy

The Alexandria South retail vacancy sits at a very low 1.6% (5,719 sf) which indicates a very healthy and strong retail environment. Vacancies in the area located in spaces that do not front Main Street and include:

- » 49 Anik Street
- » 66 Anik Street

Opportunities for infill development in the Alexandria South node include:

- » 369 Main St S opposite Benson (~0.9ac)
- » Lot beside Jean Coutu (~0.4 ac)
- » Land opposite Giant Tiger currently owned by Loblaws.

Overall Retail Sales Productivity Estimates

Initial estimates of the inventory in terms of mix, quality and offering and the low vacancy suggests that the productivity is estimated to be in the range of \$240 to \$260 per sf. The higher profile nature of the business mix, combined with the average larger floorspace areas suggest that the performance of most branded retailers is healthy and strong. Specific retailers like Tim Hortons, LCBO and Canadian Tire are likely to be very strong performers in their respective portfolios.

Figure 5-6. Alexandria South Node Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)

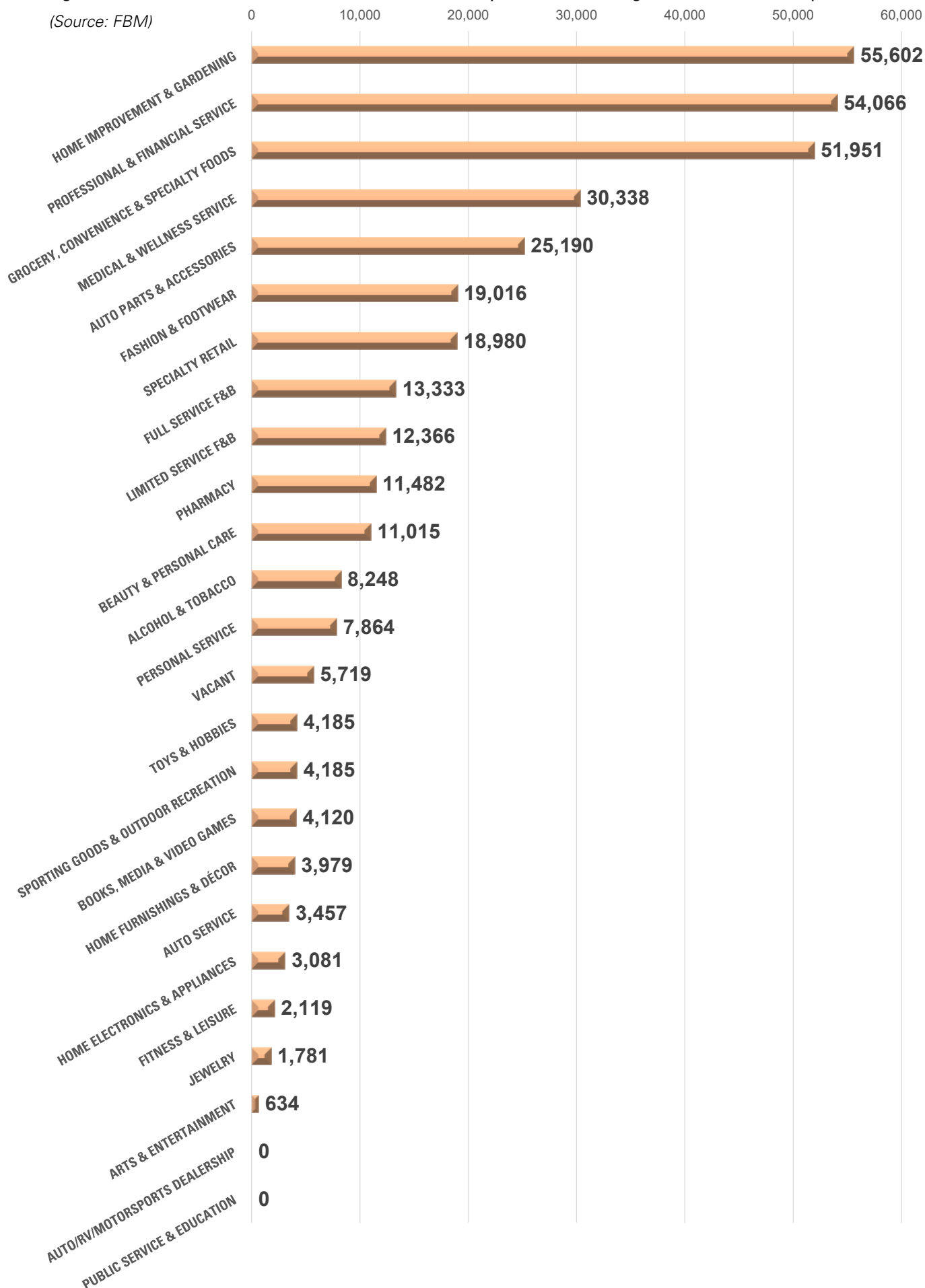


Table 5-3. Alexandria South Commercial Inventory

(Source: Manifold Data Mining Inc & FBM)

MERCHANDISE CATEGORY	ALEXANDRIA SOUTH FLOORSPACE (sq. ft.)	ALEXANDRIA SOUTH MIX (%)
HOME IMPROVEMENT & GARDENING	55,602	15.8%
PROFESSIONAL & FINANCIAL SERVICE	54,066	15.3%
GROCERY, CONVENIENCE & SPECIALTY FOODS	51,951	14.7%
MEDICAL & WELLNESS SERVICE	30,338	8.6%
AUTO PARTS & ACCESSORIES	25,190	7.1%
FASHION & FOOTWEAR	19,016	5.4%
SPECIALTY RETAIL	18,980	5.4%
FULL SERVICE F&B	13,333	3.8%
LIMITED SERVICE F&B	12,366	3.5%
PHARMACY	11,482	3.3%
BEAUTY & PERSONAL CARE	11,015	3.1%
ALCOHOL & TOBACCO	8,248	2.3%
PERSONAL SERVICE	7,864	2.2%
VACANT	5,719	1.6%
TOYS & HOBBIES	4,185	1.2%
SPORTING GOODS & OUTDOOR RECREATION	4,185	1.2%
BOOKS, MEDIA & VIDEO GAMES	4,120	1.2%
HOME FURNISHINGS & DÉCOR	3,979	1.1%
AUTO SERVICE	3,457	1.0%
HOME ELECTRONICS & APPLIANCES	3,081	0.9%
FITNESS & LEISURE	2,119	0.6%
JEWELRY	1,781	0.5%
ARTS & ENTERTAINMENT	634	0.2%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
PUBLIC SERVICE & EDUCATION	0	0.0%
TOTAL	352,711	

Retail Floorspace (excluding Medical & Wellness, Professional Services & Vacant)

259,130

73%

Figure 5-7. Alexandria Main Street (South) Retail Inventory

(Source: FBM with imagery from DRAPE 2019-2020 Orthos - Includes Material © 2019 Of The Queen's Printer For Ontario. All Rights Reserved)

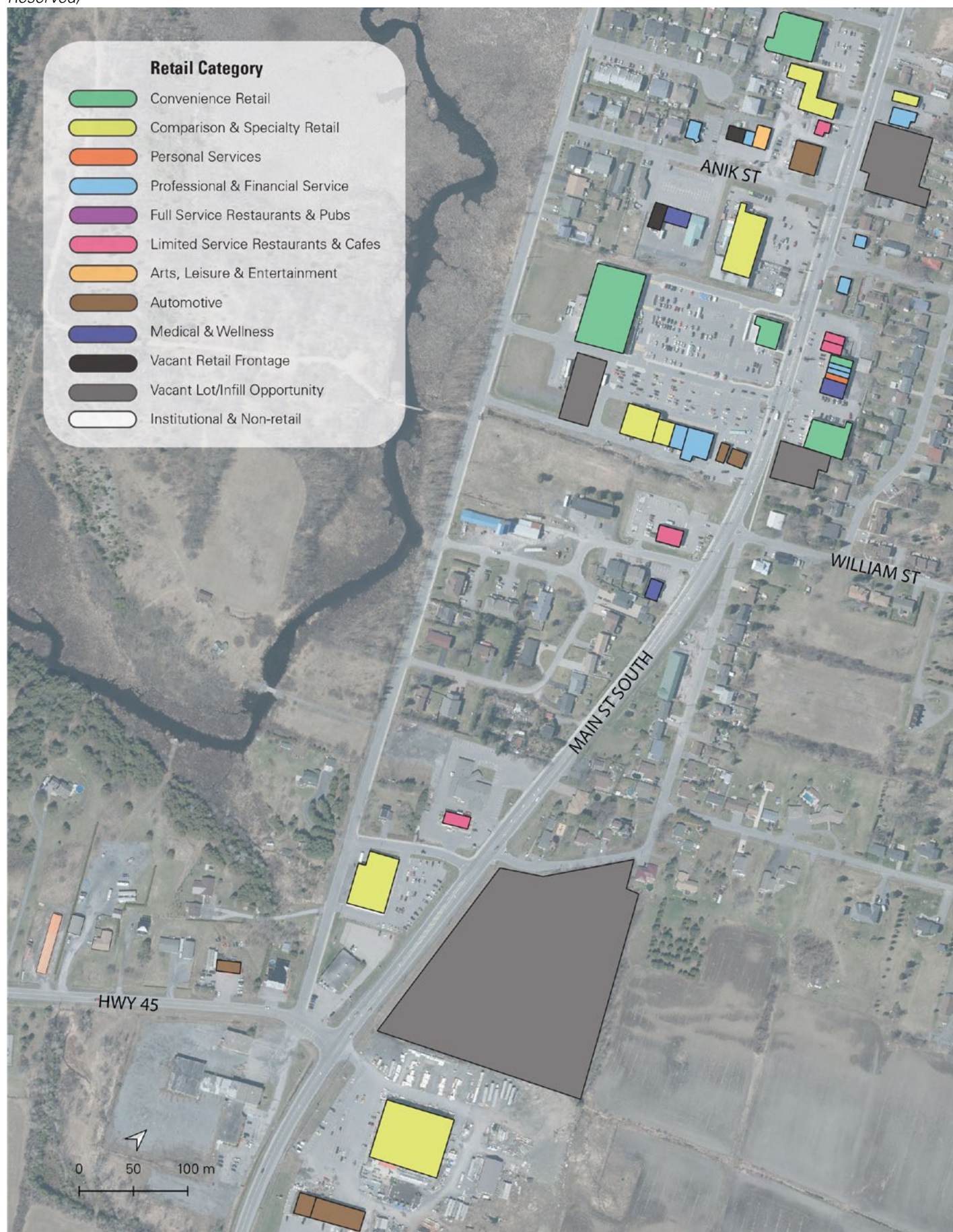


Figure 5-8. Alexandria Representative Commercial Imagery - All Nodes

(Source: FBM Fieldwork)





(Source: Google Streetview, 2021)

Figure 5-9. Notable Vacancies in Alexandria

(Source: FBM Fieldwork)



5.7 Maxville Summary

The full retail and business mix inventory for Maxville is summarized in **Table 5-4** and **Figure 5-10** to **Figure 5-12**. Maxville is indicative of a traditional older “four-corners” main street village and every effort should be made to make sure that this “four corners” aspect is harnessed and enhanced as part of its uniqueness and placemaking asset.

Inventory and business mix

Maxville has a total ground level retail inventory (**Figure 5-10**) of approximately 56,294 sf (**Table 5-4**).

There are currently only a handful of retail storefronts in Maxville of which 6 or 67% are local independents. In terms of floorspace this ratio equates to only 33% of the mix. This figure is somewhat misleading for Maxville since Home Hardware is a recognized locally-owned national brand, so in many respects it is viewed as local. As it is the largest floorspace in Maxville if this was considered local, the ratio of local floorspace to branded would flip considerably to 74% local. This ratio is typical for comparable small, rural markets and in some cases can be as high as 85% to 15%. The average store size is also somewhat skewed because of the Home Hardware, which is a newly constructed facility.

Vacancy

Maxville’s retail vacancy is only 2.9% (1,622 sf). Other buildings that may appear vacant are beyond repair for leasing and therefore are not considered as vacant space. Rather they are more indicative of redevelopment opportunities much like that which Home Hardware recently completed.

The true opportunity for Maxville lies in potentially creating a redevelopment opportunity along main street that provides newer quality space capable of reintroducing a new local grocery/bakery/butcher concept to service the immediate local community. Even though the former Pronto Food Market is no longer in the community, this does not preclude the need nor opportunity for a small grocer in Maxville.



Maxville			
30,758	Local		6
	Brand		3
business count	Local		67%
	Brand		33%
floorspace	Local		10,070
	Brand		20,688
floorspace	Local		33%
	Brand		67%

Avg Local Size 1,678
Avg Branded Size 6,896

Figure 5-10. Maxville Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)

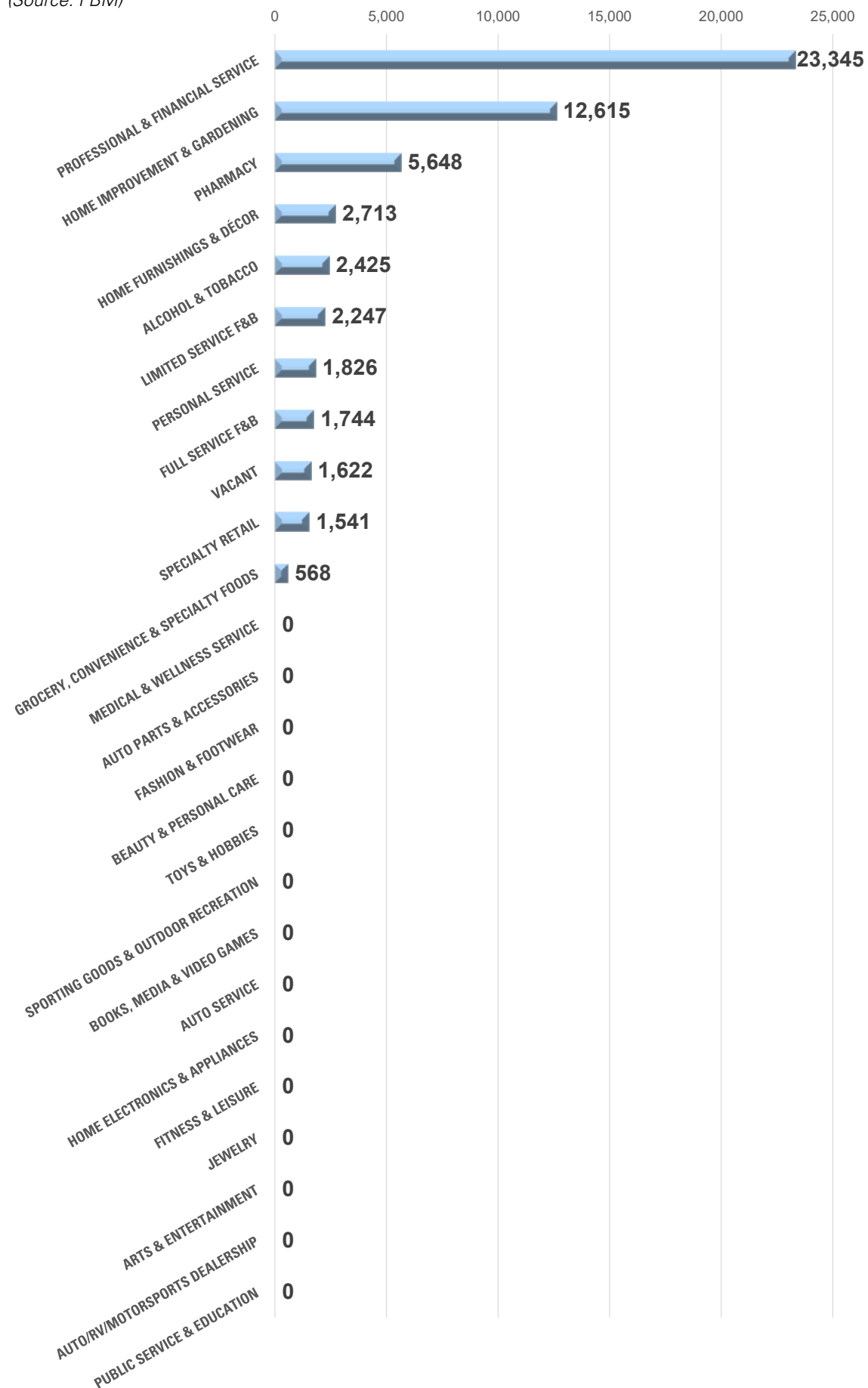


Table 5-4. Maxville Commercial Inventory

(Source: Manifold Data Mining Inc & FBM)

MERCHANDISE CATEGORY	MAXVILLE FLOORSPACE (sq. ft.)	MAXVILLE MIX (%)
PROFESSIONAL & FINANCIAL SERVICE	23,345	41.5%
HOME IMPROVEMENT & GARDENING	12,615	22.4%
PHARMACY	5,648	10.0%
HOME FURNISHINGS & DÉCOR	2,713	4.8%
ALCOHOL & TOBACCO	2,425	4.3%
LIMITED SERVICE F&B	2,247	4.0%
PERSONAL SERVICE	1,826	3.2%
FULL SERVICE F&B	1,744	3.1%
VACANT	1,622	2.9%
SPECIALTY RETAIL	1,541	2.7%
GROCERY, CONVENIENCE & SPECIALTY FOODS	568	1.0%
MEDICAL & WELLNESS SERVICE	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
FASHION & FOOTWEAR	0	0.0%
BEAUTY & PERSONAL CARE	0	0.0%
TOYS & HOBBIES	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%
BOOKS, MEDIA & VIDEO GAMES	0	0.0%
AUTO SERVICE	0	0.0%
HOME ELECTRONICS & APPLIANCES	0	0.0%
FITNESS & LEISURE	0	0.0%
JEWELRY	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
PUBLIC SERVICE & EDUCATION	0	0.0%
TOTAL	56,294	

Retail Floorspace (excluding Medical & Wellness, Professional Services & Vacant)

31,326

56%

(Source: FBM with imagery from DRAPE 2019-2020 Orthos - Includes Material © 2019 Of The Queen's Printer For Ontario. All Rights Reserved)



Figure 5-12. Maxville Representative Commercial Imagery

(Source: FBM Fieldwork)



6.0 Resident and Consumer Survey

6.1 Introduction

As a supplemental part of this Commercial Gap Analysis, a survey was conducted by Deloitte (formerly MDB Insight). The purpose of this survey was to obtain feedback from community members from within North Glengarry as well as from the surrounding areas. The aim of the study was to determine the use of local retailers and any gaps that exist in local shops or services.

The survey was conducted via an online open-URL survey shared widely with community members in French and English through a number of websites and organizations. These included:

- Township of North Glengarry website
- Maxville & District Chamber of Commerce website and Facebook page;
- United Counties of Stormont, Dundas and Glengarry website;
- My Glengarry Business Page (Facebook)

The survey was conducted over the period of March 15th to April 11th, 2022 and gained 410 completed responses.

Respondents were split into residents of North Glengarry and non-residents and asked a specific set of questions about uses and attitudes towards retailers the area.

The full responses to the questions is provided in **Appendix B**.

6.2 Key Findings

The following provides a summary of the key findings from the survey.

- Residents of North Glengarry tended to use retailers in Alexandria frequently for their day-to-day conveniences. Retailers in Maxville were used less frequently.
- Residents of North Glengarry often shopped for bigger-ticket items in Cornwall or Ottawa. Over three quarters of residents were willing to travel more than 30 km for these bigger ticket items.
- Non-residents respondents, many of whom lived in Stormont, Dundas, and South Glengarry visited Alexandria often for their day-to-day conveniences.
- Clothing/footwear, grocery/specialty foods, house/home décor, and arts/entertainment were some of the commonly-mentioned shops or services that respondents felt were missing from North Glengarry.
- Some of the main issues preventing the respondents from using shops and services in North Glengarry included: Missing specific retailers/merchandise, and cost of good or services.

6.2.1 North Glengarry Residents

For North Glengarry Residents, some specific findings of the Survey Results included the following:

- Among the residents, 16% of the respondents were also business owners. Alexandria was the community where most resident respondents lived followed by Maxville. Among respondents, 32% worked in Alexandria, and 7% in Maxville.
- Three quarters of the respondents were not willing to travel more than 30 km for their day-to-day conveniences. Most residents preferred to shop in Alexandria for their day-to-day conveniences, and 19% preferred Cornwall.
- The majority of residents reported shopping in Alexandria at least weekly, while many residents reported shopping in Maxville yearly or less.
- 81% of resident respondents were willing to travel more than 30 km for their bigger ticket items. Cornwall and Ottawa were the top choices for big-ticket item shopping.
- Clothing/footwear, grocery/specialty foods, and house/home décor were some of the commonly-mentioned shops or services that residents felt were missing from North Glengarry. In terms of "Other" open-ended responses included Bakery, home furniture, theatres, affordable grocery store, auto repair, medical services, fitness facilities, big box stores, fast food, coffee shops, ice cream parlour, children's clothing store.
- The most commonly-mentioned reasons for residents not using Alexandria or Maxville's shops & services included: the area was missing specific merchandise or the costs were too high.

6.2.2 Non-North Glengarry Residents

For Non-North Glengarry Residents, some specific findings of the Survey Results included the following:

- Among non-resident respondents, 69% were from the United Counties of Stormont, Dundas and Glengarry (excluding North Glengarry). Many of these respondents reported either working in Stormont, Dundas or South Glengarry, or working from home.
- Over half (58%) of the non-resident respondents reported using shops or services in Alexandria weekly or more. 16% mentioned they used shops or services in Maxville weekly or more.
- Non-residents often mentioned that clothing/footwear, grocery/specialty foods and arts/entertainment were missing from North Glengarry. In terms of "Other" open-ended responses, grocery, medical services, entertainment, antiques, coffee shop, after school programs, and home appliances were cited most often.
- Non-residents often reported that they travel to Alexandria or Maxville for either a specific retailer/business or for recreation/leisure.

7.0 Market Demand Analysis

7.1 Introduction

The following section will assess the amount of supportable retail floorspace in Alexandria/Maxville justified by the present Trade Area and premised on estimates of the current market share of total available retail spending by the existing trade area. This process will forecast demand in terms of both floorspace (square footage) and land (acres) to provide a basis for future land use planning in the Township

7.2 Retail Floorspace Demand

In most typical urban market scenarios, forecasting retail demand would largely be predicated and have a close correlation with population growth and the inherent opportunities that would naturally come from a growing trade area. However in secondary or rural markets and since population growth forecasts in the Township are not expected to provide this requisite increase, an alternative approach to demand is applied. As noted previously, demand forecasts are predicated on past population projections that did not show noticeable population growth, and therefore can be considered conservative in their outlook since it is becoming more realistic to view Alexandria as having positive growth dynamics over the next decade.

The overall Alexandria/Maxville retail market seems to exhibit some small-scale near term opportunities, mostly in Alexandria within the existing retail inventory to accommodate new business opportunities.

With this understanding of the retail market dynamic and population growth and the results of the consumer survey, the key to forecasting new floorspace demand must look at the notion of achieving a greater market share of the existing spending for categories that represent strength today. In particular, as will be shown, this greater market share will need to apply to the local and surrounding trade area, given what seems to be a mediocre overall sales retention.

From FBM's extensive analysis of the current retail inventory, retail sales productivity estimates were applied to each of the respective categories to provide an indication of the current estimated retail sales that Alexandria and Maxville's businesses are generating.

A sounding board for retail productivities are the lease rates which are estimated to be in the range of \$10 - \$18 per sf in Alexandria's North node including downtown, and in the range of \$20 to \$30 per sf in Alexandria's South node.

On this basis, it is estimated that retail sales productivities in the community would average in the \$150 to \$250 per sf range with the possible exception of conveniences which could be in the range of \$300 to \$400 per sf.

By dividing the total Trade Area retail spending potential into the category-specific retail sales productivity estimates (measured in \$/sf), the estimated market share figures could be calculated from which a measure of supportable floorspace can be determined.

Demand Based on Existing Market Shares

The results of this approach is shown in **Table 7-1** which quantifies the total estimated market share of retail spending in the North Glengarry Trade Area (not including the Secondary Trade Area). **Table 7-1** reveals that North Glengarry's residents currently garner just over half of the available Trade Area spending (52.7%). This means that almost 47% of the resident Trade Area spending is spent outside of the community.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing 59% of the Trade Area spending, where in reality this figure should be more in the range of 70%.

The current demographic composition of the community along with the presence of a hospital leads to a higher than average retention of Pharmacy spending captured in the community. This is evidenced by the presence of multiple stores like Pharmasave, Shoppers Drug Mart and Jean Coutu. These stores are also strong contributors to the high retention of spending on Beauty & Personal Care.



Table 7-1. Estimated Market Share Retention of Retail Spending in North Glengarry 2021

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2021			
		North Glengarry Sales Productivity (\$psf)	North Glengarry Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$335	59%	\$27,085,444	80,887
	Pharmacy	\$314	95%	\$4,331,860	13,791
	Alcohol & Tobacco	\$360	72%	\$5,199,510	14,457
	Personal Services	\$111	14%	\$2,010,335	18,064
	<i>Health Care & Medical (not applicable)</i>				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$205	35%	\$3,896,743	19,016
	Jewelry	\$318	71%	\$639,000	2,012
	Beauty & Personal Care	\$279	82%	\$3,395,054	12,170
	Home Furniture & Décor	\$168	28%	\$1,528,997	9,120
	Appliances & Electronics	\$162	11%	\$967,203	5,959
	Home Improvement & Gardening	\$175	70%	\$12,788,804	73,288
	Books & Media	\$101	9%	\$414,125	4,120
	Sporting Goods	\$203	62%	\$850,085	4,185
	Toys & Hobbies	\$185	63%	\$994,835	5,373
	Specialty Retail	\$167	71%	\$3,992,255	23,862
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$325	55%	\$5,254,428	20,462
	Restaurants & Pubs	\$257	60%	\$5,321,973	24,938
	Arts & Entertainment	\$213	29%	\$238,292	2,582
	Fitness & Leisure	\$92	42%	\$763,370	7,241
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$105	68%	\$6,880,501	25,421
	Auto/RV/Motorsports Dealerships	\$271	91%	\$17,659,481	69,654
	<i>Auto Fuel (not applicable)</i>				

Not unexpectedly, Fashion & Accessories (including Footwear) exhibit low retention of spending at only 35%. Much of this spending is drawn to Ottawa or Cornwall. Books & Media and Appliances and Electronics also have low patterns of retention. While some of this is drawn to Ottawa and Cornwall, the role of online retail sales is significant in these categories, as it is for Home Furniture & Decor, which is also a low spending retention category.

The best way for a community like Alexandria to capture more of this spending would likely be through the introduction of a General Merchandise retailer like a Walmart or Real Canadian Superstore, which tends to carry all of these product offerings. Similarly, any smaller retailer would be well-advised to ensure as broad an offering as possible at a value price point to ensure concept marketability, if not occupying a larger store size.



Table 7-2. Estimated Retail Demand by 2031 Based on Maintaining Current Market Share

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2031				2021 to 2031	
		North Glengarry Sales Productivity (\$psf)	North Glengarry Estimated Market Share	Market Share Sales \$	Total New Retail Floorspace (sf)	Current City Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$335	59%	\$31,256,933	12,458	80,887	12,458
	Pharmacy	\$314	95%	\$4,998,310	2,122	13,791	2,122
	Alcohol & Tobacco	\$360	72%	\$5,999,926	2,226	14,457	2,226
	Personal Services	\$111	14%	\$2,320,289	2,785	18,064	2,785
	Health Care & Medical (not applicable)						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$205	35%	\$4,497,802	2,933	19,016	2,933
	Jewelry	\$318	71%	\$737,602	311	2,012	311
	Beauty & Personal Care	\$279	82%	\$3,918,273	1,875	12,170	1,875
	Home Furniture & Décor	\$168	28%	\$1,764,567	1,405	9,120	1,405
	Appliances & Electronics	\$162	11%	\$1,116,219	918	5,959	918
	Home Improvement & Gardening	\$175	70%	\$14,756,691	11,277	73,288	11,277
	Books & Media	\$101	9%	\$478,225	638	4,120	638
	Sporting Goods	\$203	62%	\$981,350	646	4,185	646
	Toys & Hobbies	\$185	63%	\$1,148,214	828	5,373	828
	Specialty Retail	\$167	71%	\$4,607,393	3,677	23,862	3,677
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$325	55%	\$6,063,665	-1,805	20,462	-1,805
	Restaurants & Pubs	\$257	60%	\$6,141,969	-1,019	24,938	-1,019
	Arts & Entertainment	\$213	29%	\$275,062	-1,293	2,582	-1,293
	Fitness & Leisure	\$92	42%	\$881,134	2,307	7,241	2,307
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$105	68%	\$7,941,345	49,905	25,421	49,905
	Auto/RV/Motorsports Dealerships	\$271	91%	\$20,379,543	5,640	69,654	5,640
	Auto Fuel (not applicable)						
TOTAL RETAIL CATEGORIES ONLY		\$225	52.7%	\$120,264,511	97,833	436,601	97,833
TOTAL (excluding Auto)		\$240	51.5%	\$91,943,623	42,288	39,120	58,713

To illustrate the impact on future demand for Alexandria, **Tables 7-2 and 7-3** illustrate the amount of future demand that would be possible simply based on maintaining the current market shares and sales productivity.

The result of this forecast reveals that by 2031, Alexandria/Maxville could support an additional new 97,883 sf of retail space. The combined categories that would be most notable in this would be Conveniences at 19,590 sf and House & Home at 13,600 sf.

On the surface, the Conveniences would include almost 13,000 sf in Grocery. This figure would be close to supportive of an additional grocery format, but equally speaking in combination with the House & Home category as well as some of the others, it may be supportive of a larger box format General Merchandise retailer.

The current market share figures also indicate support for further Automotive opportunities. Conversely, the Restaurant sector, which has been hit hard by the COVID-19 pandemic is not illustrative of as much demand based on current market shares, which are relatively low at 55% for Quick Service F&B and 60% for Restaurants & Pubs.

Forecasts to 2031 that are premised on conservative, maintained rates of market share reveal demand for just under 100,000 sf of new floorspace. It would be reasonable to allocate a need for 7 to 10 acres of potential land, assuming that 80,000 sf or more of the new floorspace would be occupied in new development.

Table 7-3. Estimated Retail Demand Summary 2021 to 2031 Based on Maintaining Current Market Share

(Source: FBM & Manifold Data Mining Inc)

Retail Merchandise Category	2021	2026	2031	2021 to 2031	
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Future NEW Demand (sf)
Convenience & Day-to-Day Goods/Services	127,198	9,706	19,590	127,198	19,590
Comparison or Department Store Type Merchandise (DSTM)	159,105	12,143	24,509	159,105	24,509
Leisure, Recreation & Entertainment Goods/Services	55,223	-5,409	-1,811	55,223	-1,811
Automotive Goods (excluding repair)	95,074	45,397	55,545	95,074	55,545
Total (sf)	436,601	61,836	97,833	436,601	97,833

Demand Based on Increased Market Shares

Looking at current market shares however is only one possibility. Therefore, an alternative direction for Alexandria's retail opportunity lies in incrementally and slowly increasing the overall market share of sales, realizing that Cornwall and Ottawa and to a lesser extent Montreal will still continue to be notable factors in attracting spending in the Department Store Type Merchandise (DSTM) categories.

Tables 7-4 and 7-5 provide a forecast of future demand in terms of floorspace and land based on applying an increase of 5% market share across all categories. While the reality may dictate that some categories may not necessarily need to increase their market share, while others may seek to increase more than 5%, the overall impact of the increase is that which is considered important in this analysis.

If the retained market shares presented previously in **Table 7-1** were to increase by 5%, the total demand by the year 2031, without new population growth, but with spending growth and increased retention could result in incremental new space of approximately 152,613 sf, or more than 50,000 sf than if the current market shares are maintained.

As an example, if the sensitized population growth forecasts were applied to the overall analysis in conjunction with increased market shares, the total demand by 2031 could be 215,000 sf.

Similarly, the analysis in this report does not take into account the market share of the Secondary Trade Area. If a reasonable market share from this area was used, it could easily add a further 50,000 to 75,000 sf of supportable floorspace.

If a 5% increase in demand was achieved, retail categories like Grocery could now be 22,000 sf and would be more appropriately sized for a sole grocery anchor, although it could still yet be part of a larger format retail operator with other merchandise categories.

Part of the overall demand in Alexandria and Maxville is not solely premised on providing new retail space since the current vacancies in downtown should be addressed as there are some well-positioned assets available for tenancies.

Forecasts for 2031 that are premised on conservative, but increased rates of market share reveals demand for just over 150,000 sf of new floorspace. It would be reasonable to allocate a need for 12 to 15 acres of potential land, assuming that upwards of 130,000 sf or more of the new floorspace would be occupied in new development.

The reality is that demand may only result in a few specifically targeted new businesses.

The goal should also be to ensure that existing businesses can increase their market share and resulting sales and profitability rather than adding new space to unnecessarily dilute what exists today.

Retail growth need not always be about adding new retail, but creating an environment for stronger retention and performance of existing businesses.

The retail demand forecasts suggest that there healthy demand for future retail and there are tenants capable of improving the sales retention and attraction in the County. Most notably, these include Walmart, Bulk Barn, and Marks.

Alexandria would be in a position to support these larger tenants, though there would likely be an impact on specific downtown retailers. This is cautionary note that speaks to ensuring that if such tenants are pursued, that they should be located as close to the existing core cluster of compatible retail in the south node rather than in a larger development at the northern side of town. The north area of Alexandria would be appropriate for a small-scale development of 10,000 to 15,000 sf, but any larger development in this area would run the risk of creating an unnecessary third node, that would further splinter the retail market.

Alexandria would be better served by promoting compact and clustered commercial growth. Future land needs at approximately 15 acres is a near term planning window, but longer term, the Township should look to ensure future land allocation is appropriately identified and sized to accommodate growth that may very well exceed the conservative forecasts presented in this study.

Though Alexandria may be the centre of commercial activity and larger growth prospects, Maxville is poised to strengthen its local offering through strategic main street redevelopments that could create new retail opportunities. If spaces in the range of 1,000 to 1,500 sf are created, then either individually, or if combined, could create the necessary spaces for missing conveniences and day-to-day items like a butcher, bakery or small grocery.

In addition to small infill properties along Maxville's main street, the Township should also consider allocating through zoning approximately 5 acres for future neighbourhood-scale commercial development. This long-term plan would be adjacent to main street and would serve to bolster Maxville's commercial offering in the future.



Table 7-4. Retail Demand by 2031 Based on Increasing Current Market Shares by 5%

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2031				2021 to 2031	
		North Glengarry Sales Productivity (\$psf)	North Glengarry Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current City Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$335	65%	\$34,460,768	22,025	80,887	22,025
	Pharmacy	\$314	105%	\$5,510,636	3,753	13,791	3,753
	Alcohol & Tobacco	\$360	80%	\$6,614,918	3,936	14,457	3,936
	Personal Services	\$111	16%	\$2,558,118	4,922	18,064	4,922
	Health Care & Medical (not applicable)						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$205	38%	\$4,958,827	5,183	19,016	5,183
	Jewelry	\$318	78%	\$813,207	549	2,012	549
	Beauty & Personal Care	\$279	90%	\$4,319,896	3,315	12,170	3,315
	Home Furniture & Décor	\$168	30%	\$1,945,435	2,484	9,120	2,484
	Appliances & Electronics	\$162	12%	\$1,230,632	1,623	5,959	1,623
	Home Improvement & Gardening	\$175	78%	\$16,269,252	19,945	73,288	19,945
	Books & Media	\$101	10%	\$527,243	1,125	4,120	1,125
	Sporting Goods	\$203	69%	\$1,081,938	1,141	4,185	1,141
	Toys & Hobbies	\$185	70%	\$1,265,906	1,464	5,373	1,464
	Specialty Retail	\$167	78%	\$5,079,650	6,499	23,862	6,499
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$325	60%	\$6,685,190	107	20,462	107
	Restaurants & Pubs	\$257	66%	\$6,771,521	1,433	24,938	1,433
	Arts & Entertainment	\$213	32%	\$303,256	-1,161	2,582	-1,161
	Fitness & Leisure	\$92	46%	\$971,450	3,285	7,241	3,285
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$105	75%	\$8,755,333	57,626	25,421	57,626
	Auto/RV/Motorsports Dealerships	\$271	101%	\$22,468,446	13,358	69,654	13,358
	Auto Fuel (not applicable)						
TOTAL RETAIL CATEGORIES ONLY		\$225	58.1%	\$132,591,624	152,613	436,601	152,613
TOTAL (excluding Auto)		\$240	56.8%	\$101,367,845	81,629	39,120	113,493

Table 7-5. Retail Demand by 2021 to 2031 Based on Increasing Current Market Shares by 5%

Retail Merchandise Category	2021	2026	2031	Current City Retail Inventory (sf)	Total Future NEW Demand (sf)
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)		
Convenience & Day-to-Day Goods/Services	127,198	16,551	34,636	127,198	34,636
Comparison or Department Store Type Merchandise (DSTM)	159,105	20,705	43,329	159,105	43,329
Leisure, Recreation & Entertainment Goods/Services	55,223	-2,918	3,664	55,223	3,664
Automotive Goods (excluding repair)	95,074	52,421	70,984	95,074	70,984
Total (sf)	436,601	86,758	152,613	436,601	152,613

8.0 Key Findings & Conclusions

8.1 Introduction

This section highlights the key findings of the Commercial Gap Analysis as well as documenting some general retail trends that are noteworthy and relevant to Alexandria and Maxville's locational, demographic and economic contexts.

8.2 Retail Market Analysis Key Findings

Without population increase, but a marginal increase in overall market share of trade area spending, Alexandria could add to its retail inventory by as much as 150,000 sf in specifically targeted categories/business types by 2031. If the majority of this was in the form of a Walmart, that alone could absorb over half of that demand, while still leaving opportunities for ancillary retail opportunities.

Realizing that downtown does currently have the majority of vacant retail spaces, an important aspect of the overall messaging is that retail demand is not simply predicated on adding new space, but specifically targeting new businesses that have the capacity to succeed while not creating a negative impact on existing local businesses.

In retail however, sometimes competition is necessary to ensure that spending is retained in the community and in many cases a new competitor can actually increase the overall spending. In the case of

Alexandria, the current market share rate of 53% is low and does suggest an opportunity to increase to almost 60%. Doing so benefits existing retailers, as well as creating a base for new retailers to enter the market.

Future Allocation Of Demand To Year 2031

The demand figures shown in **Table 8-1** provide guidance for retail growth in Alexandria and Maxville over the next 10 years, with an eye to how future development could or should proceed over the longer term and as planning and economic development strategies evolve. Based on existing and future market share scenarios, retail demand is anticipated to be 100,000 to 150,000 sf for Alexandria, and 20,000 to 30,000 sf for Maxville. Continuing to concentrate commercial development in established nodes has multiple benefits, including supporting existing businesses, maximizing existing municipal infrastructure and reducing vehicle trips between stores. Alexandria's south highway commercial node is poised to absorb the majority of demand through infill and greenfill development. The Main Street commercial nodes in Alexandria and Maxville will continue to play a key role in the commercial mix primarily through strategic infill and redevelopment.

As mentioned previously, demand in this analysis is based on market driven parameters, but economic development factors driven by internal and external investment attraction have the proven ability to increase figures.

Table 8-1. Future Allocation of Demand to year 2031

Retail Node	Total 10-yr New Demand by 2031 with CURRENT Market Share (sf / acres)		Alexandria				Maxville			
			% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
Total	97,833	6.4	80%	78,267	0.32	5.5	20%	19,567	0.50	0.9
Main Street Commercial			15%	14,675	0.5	0.7	20%	19,567	0.5	0.9
South Highway Commercial			55%	53,808	0.3	4.1				
North Highway Commercial			10%	9,783	0.3	0.7				
Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		Alexandria				Maxville			
			% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
Total	152,613	10.0	80%	122,090	0.32	8.6	20%	30,523	0.50	1.4
Main Street Commercial			15%	22,892	0.5	1.1	20%	30,523	0.5	1.4
South Highway Commercial			55%	83,937	0.3	6.4				
North Highway Commercial			10%	15,261	0.3	1.2				

8.3 Action Plan

Since forecasts in this study are yielding conservative estimates for floorspace and land, any growth planning exercise should consider a longer-term need for future commercial land with a preference for locating the majority of this land in the south, with a smaller allocation in the north. While conservative demand suggest demand in 10 years for approximately 15 acres, when thinking over the next 25 years, the Township should be looking to create commercial land opportunities in the range of 30 acres in order to ensure full capacity and responsiveness for potential commercial investment. New demand will require concerted effort at allocating appropriately sized and serviced land in areas most beneficial, such as south for larger node and north for smaller node.

Because of the higher levels of vacancies in Alexandria's downtown, the Township and Chambers of Commerce should work with landlords in downtown to actively promote and utilize vacant spaces, as they have started to do with the Community Market weekend pop-up. The goal should be to create daily activation of available spaces by looking at ways to create rotating "main street pop-ups." One such example is in the image below taken from the Town of Mahone Bay in Nova Scotia.



As a smaller local market Maxville's retail demand is predicated on promoting higher value redevelopment/infill projects along main street. Current properties at 14 and 22 Main Street here are properties on Maxville's Main Street that currently have limited prospects for leasing due to the poor quality of the spaces and the buildings themselves. They could however undertake redevelopments similar to that which Home Hardware recently completed, and provide quality spaces that could be more conducive to attracting grocer/deli or bakery/cafe type concepts.

Also, as Maxville garners more interest for new residential development, any new commercial development should be encouraged in and around the existing main street area so as to ensure a compact critical mass of businesses in a walkable, pedestrian-friendly streetscape.

In a small local market like Maxville as well as a secondary larger market like Alexandria, the key to attracting businesses lies not only in presenting a good market and business case, but will also fall under three (3) approaches; securing franchise partners, succession planning, and attracting small independent owners.

For many businesses with recognized brands, the likelihood of attracting a corporate run store is limited, but the **franchise** or licensee model is a distinct possibility.

The optimal approach for this target is to look at a market like Ottawa or Cornwall or even Hawkesbury to see if existing franchise holders would be interested in additional locations as part of an overall locational network strategy in Alexandria. This approach is preferred by franchisers as there is a built in relationship with the franchisees who understand the business model.

The second approach, **succession planning**, is often overlooked in smaller or secondary markets, where a successful local business may be family run and is of value to the community, but its future is up-in-the-air because no one is able to take over.

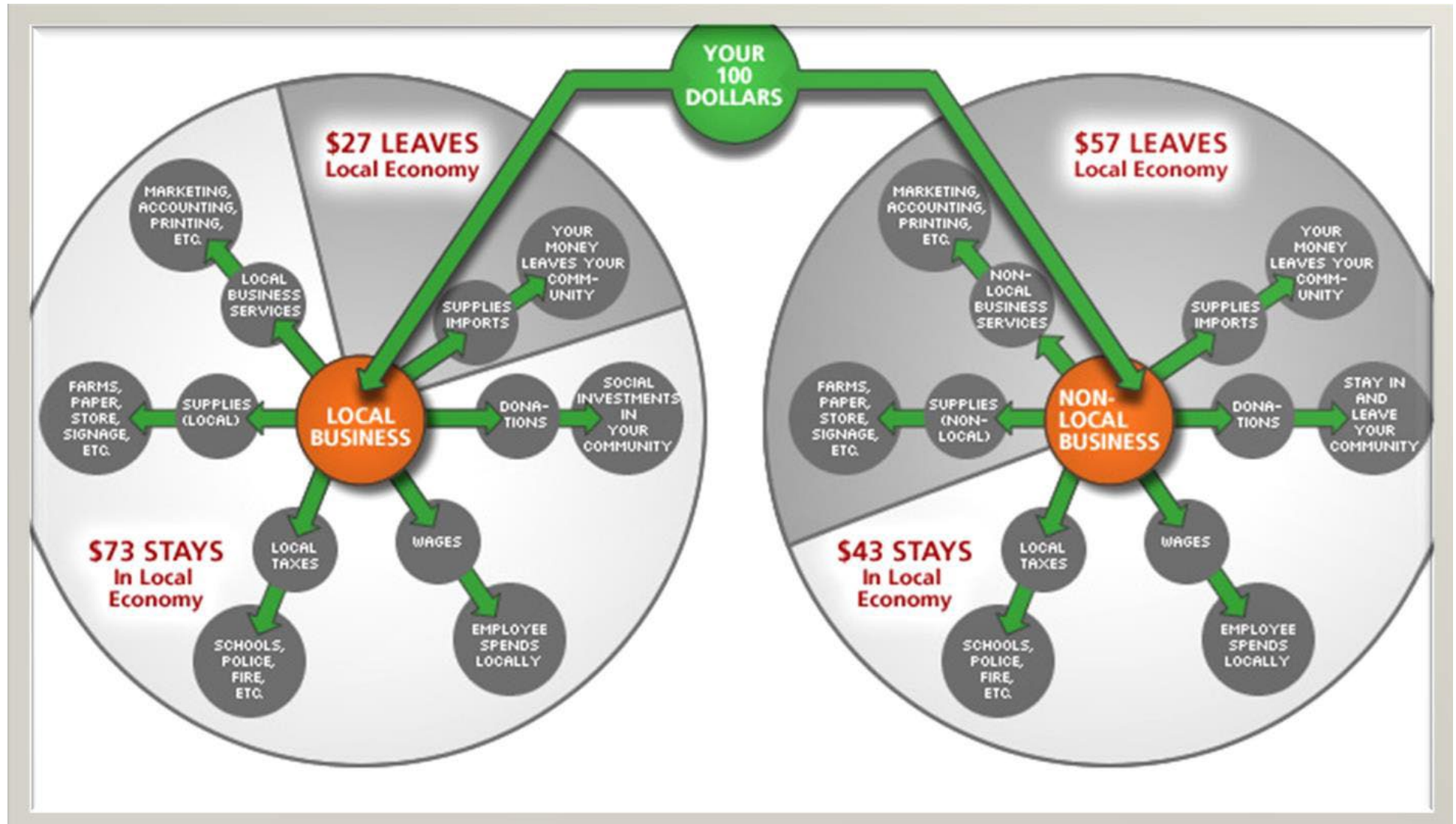
An organization such as [Succession Matching](#) provides a road map for businesses to ensure they can continue in their respective communities. Succession planning looks to understand the Consumer Segment, Value Proposition, Revenue Streams, Distribution Channels and Key Partnerships.

Additionally, there are opportunities to cultivate **local independent store types** that would be equipped to fit within the downtown as either pop-up incubators or full-time tenants. Smaller communities and those with essential downtowns or main streets, must continue to cultivate an environment in which local independent stores can succeed. Independent stores contribute to community vitality with unique offerings and experiences, and often have more flexibility to adapt to changing environments compared with larger businesses. Additionally, a higher portion of money spent in local small businesses stays in the community compared with non-local and larger businesses (**Figure 8-1**).

Figure 8-1. Supporting Local Businesses Builds Communities Diagram

A study by Synergy Credit Union in the City of Lloydminster (Alberta), found that for every \$100 spent in local businesses, \$73 (73%) stays in the community to support local business services and supplies, and contributes to local taxes, wages and donations. In contrast, \$43 (43%) of every \$100 spent at a non-local business stays in the community and contributes to local taxes, wages and donations. While exact dollar figures vary by community, the trend and pattern is consistent in studies like this across North America whereby a higher portion of retail dollars invested in locally owned and operated businesses tend to stay in the community compared to non-local businesses.

(Source: Synergy Credit Union Economic Development Breakfast Presentation, May 2022)



In both Maxville and Alexandria, the following independent store types could be considered as compatible with the demographic profiles and anticipated development.

Independent Store Types

- » Recycled/Upcycled Fashions
- » Urban Cider/Cider House
- » Delicatessen/Butcher
- » Specialty Beef Jerky/Hot Sauces
- » Community Food Coop-Deli
- » Community Kitchen
- » Co-working office/café
- » Ethnic fare (Filipino, Indian etc)

Branded or franchise tenants that are also considered compatible with the demographics, spending characteristics and location include the following, which are presented as either near term opportunities (<5 years) or longer term opportunities (>5 years):

Short Term (<5 yrs)

- » Full service restaurant (2,000 sf to 5,000 sf)
- » Quick service restaurant
- » Unisex clothing store
- » Home improvement store
- » Specialty food stores (e.g. Bulk food, specialty meats, bakery, cafe)
- » Sporting good and hobby stores
- » Discount/ general merchandise store

In the case of a retailer like Bulk Barn or M&M Meats, an ideal location would be located next to the Independent Grocer where a vacant commercial land parcel exists.

This land could accommodate an approximate 10,000 sf retail building capable of housing a 5,000 sf Bulk Barn along with two to three other smaller retail units, all within the existing critical mass of retail.

In the future, as the community grows, even a retailer like Canadian Tire may outgrow its current format size and look for new land in which to build a larger store with a possible co-owned tenant Marks. The backfilling of the Canadian Tire could open an opportunity for a 20,000 sf grocery who would benefit from the proximity to the existing Independent Grocer. Retail can often including a shifting of pieces, but this can only be possible if the land is available.

Longer Term (>5 yrs)

- » Medium to large general merchandise/ department store (e.g. fashion apparel, housewares, toys)
- » Medium to large grocery store
- » For-profit second-hand clothing retailer

Alexandria and Maxville may not exhibit significant demand forecasts, but with strategic messaging, collaborations and awareness, the community can retain and attract business opportunities capable of utilizing existing vacancies, or new land for the betterment of the community.



8.4 Action Item Summary

The following is a summary of suggested action items for the Township of North Glengarry based on the report findings. Each action notes the community area it pertains to and when the action could be started. This is meant to guide further internal discussion around priorities and collaboration opportunities.

	Area(s)	Now <1yr	Next 1-5yr	Ongoing
Enable Supportive Policy and Concentrate Development in Established Commercial Nodes				
» Submit data to the United Counties for review as part of the Growth Study for the Official Plan.	Both	X		
» Identify properties that could be included in the urban boundary to enable development within the southern commercial node.	Alexandria	X		
» Identify servicing requirements for properties that could be added to the urban boundary.	Both	X		
» Consider allocating approximately 5 ac for future longer-term, neighbourhood-scale and main street adjacent commercial	Maxville		X	
» Continue encouraging commercial facade improvements through the Community Improvement Plan in Maxville and Alexandria.	Both			X
Increase Market Share and Businesses Supports				
» Strategically target developments that have the ability to benefit the greater community rather than impacting existing businesses.	Both			X
» Prioritize Alexandria's downtown area and Maxville's main street for business attraction and small infill development	Both			X
» Cultivate local independent store types on Alexandria and Maxville's Main Streets.	Both			X
» Encourage a small grocery retailer in Maxville.	Maxville	X		
» Support new retail opportunities in the range of 1,000- 1,500 sf concentrated in and around Maxville's Main Street.	Maxville		X	
» Encourage redevelopment of underused properties in Maxville (e.g. recent Home Hardware development).	Maxville		X	
» Collaborate with the Chambers of Commerce and downtown landlords to actively promote and utilize vacant spaces with the goal of activating the spaces.	Both			X
» Engage with local and regional commercial real estate agencies to proactively share the market opportunities	Both	X		
Attract Visitors and Residents				
» Promote passenger rail connectivity to attract residents and workers	Alexandria	X		
» Market Alexandria's offerings within its trade area and towards Rigaud (secondary trade area) to capture more visitor spending	Alexandria			X
» Attract residents to Maxville through workforce opportunities (e.g. Ford parts distribution plant in Casselman)	Maxville		X	
» Explore collaboration opportunities with VIA Rail to encourage rail users to visit Main Street through gateway and directional signage.	Alexandria		X	

Commercial Gap Analysis

Township of North Glengarry

Appendices



Appendix A: Select Large Font Tables and Figures

Figure 2-4. Commercial CIP improvements in Alexandria and Maxville (2016-2021)

*Maxville Home Hardware build is not represented below as it is considered an outlier.
Reported project value based on CIP data.

(Source: Township of North Glengarry CIP data & FBM)

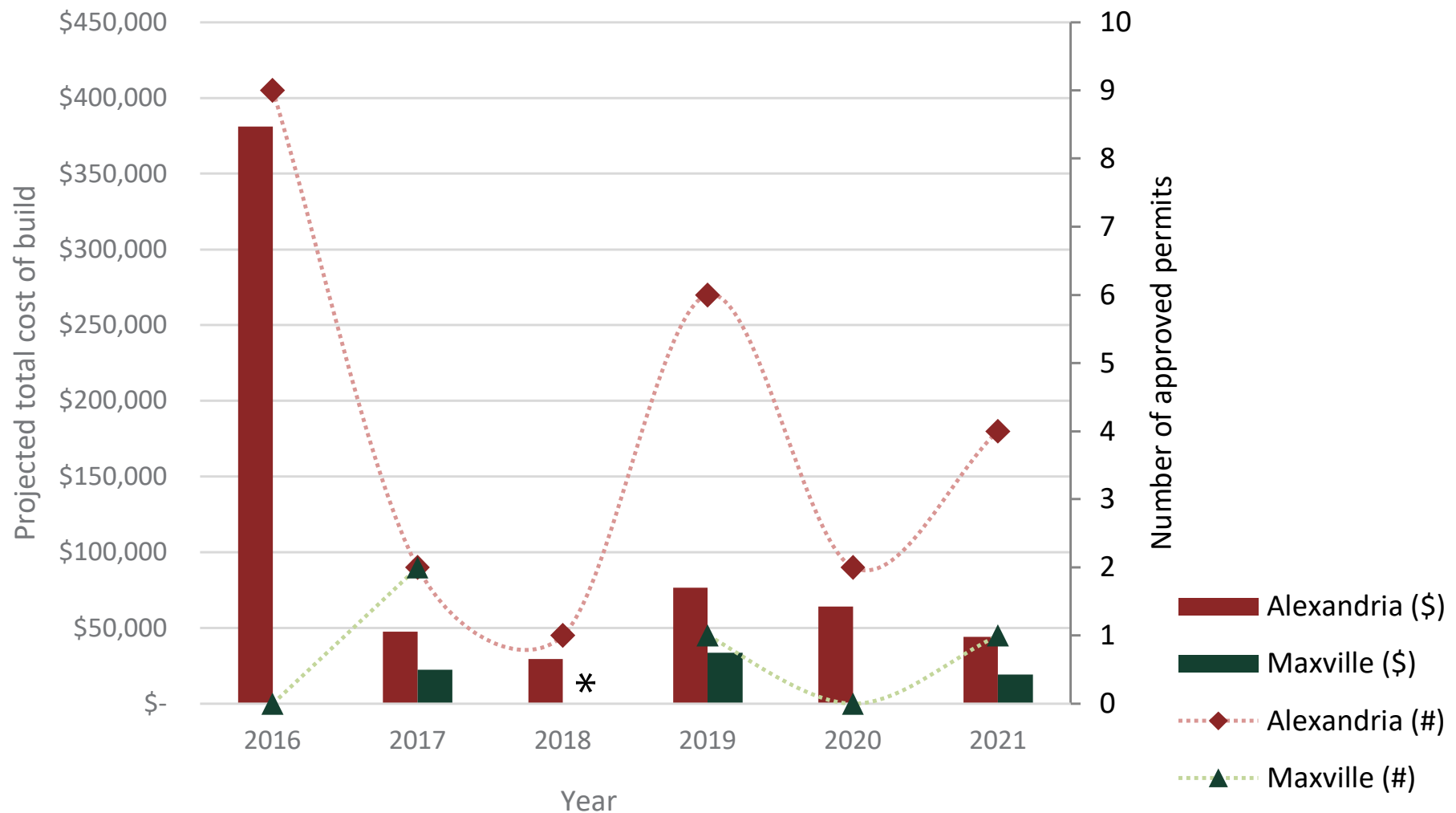




Figure 2-5. Residential CIP improvements in Alexandria and Maxville (2016-2021)

(Source: Township of North Glengarry CIP data & FBM)

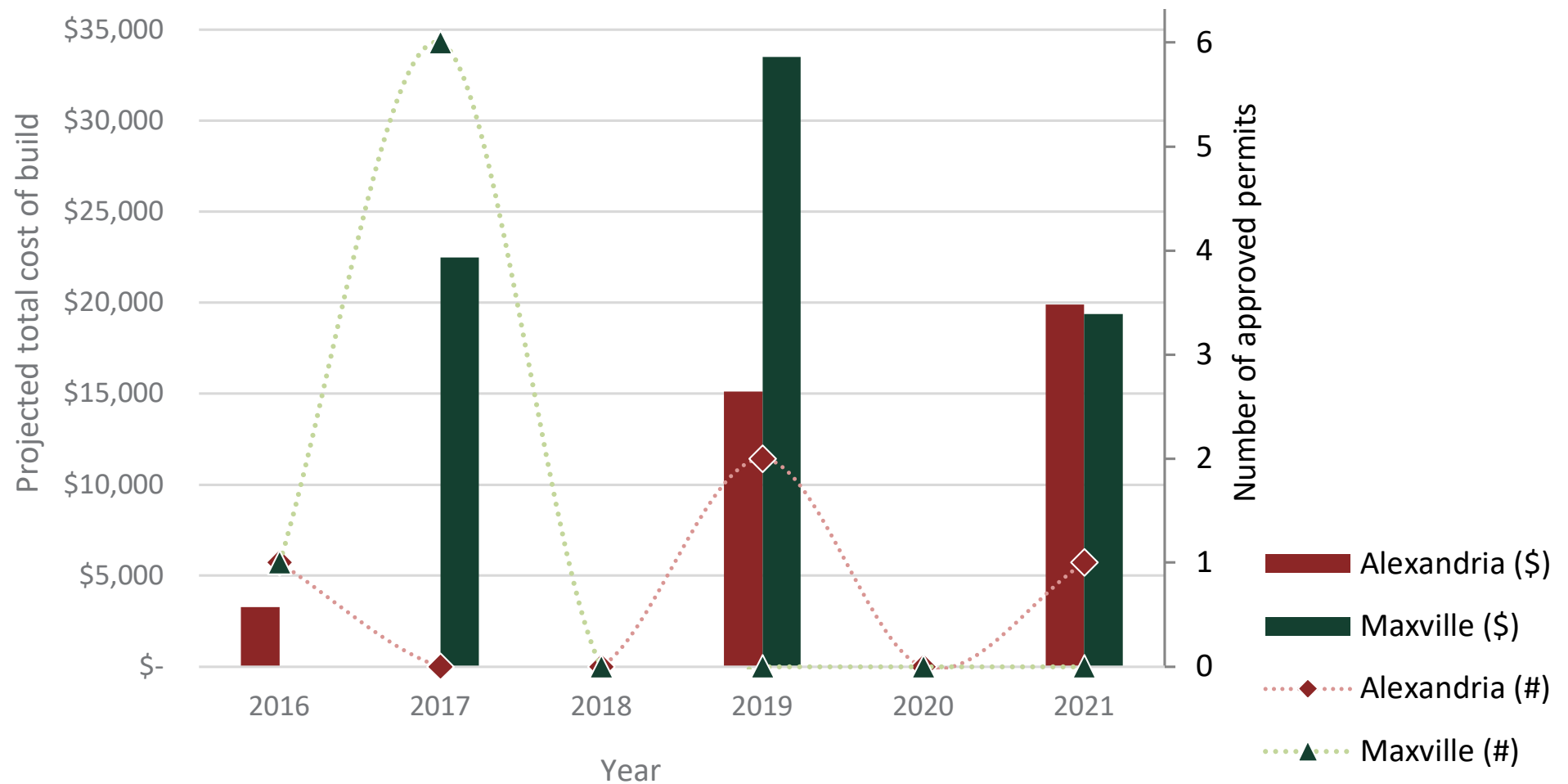


Table 2-1. Township of North Glengarry Building Permits (2015-2021)

**Maxville Home Hardware reported project value according to building permit data.
(Source: Township of North Glengarry & FBM)*



Year	North Glengarry		Alexandria				Maxville			
	All types		All types		Commercial Only		All types		Commercial Only	
	Total permits	Total project estimated value	Total Permits	Total project estimated value	Total Permits	Total project estimated value	Total Permits	Total project estimated value	Total Permits	Total project estimated value
2016	269	\$11,585,496	138	\$4,612,524	21	\$753,600	30	\$1,628,630	2	\$15,330
2017	241	\$30,528,366	120	\$21,753,967	12	\$1,102,800	34	\$3,712,466	9	\$111,000
2018	221	\$15,274,920	114	\$5,590,100	8	\$401,540	22	\$3,582,500	1	\$1,000,000 *
2019	224	\$12,710,623	125	\$7,927,623	9	\$466,000	21	\$1,937,500	5	\$503,000
2020	224	\$12,508,911	128	\$6,005,121	7	\$157,145	16	\$2,067,500	1	\$1,000
2021 *	241	\$22,453,747	140	\$11,713,347	11	\$1,607,000	30	\$4,312,300	5	\$76,400
*YTD Nov 2021										
TOTAL	1420	\$105,062,063	765	\$57,602,682	68	\$4,488,085	153	\$17,240,896	23	\$1,706,730



Table 4-1.
Trade Area Demographic Summary
(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
SUMMARY								
Total population	14,693,829		15,166			1,982		
Total population age 15 and over	12,416,879		13,121			1,671		
Total number of private households	5,700,850		6,385			881		
Average number of persons in private households	2.53		2.23		88	2.24		89
Total population in private households	14,410,904		14,264			1,972		
Total number of census families in private households	4,076,137		4,480			586		
Average number of persons per census family	2.98		2.73		92	2.84		95
Total population in families	12,185,364		12,248			1,663		
Total number of labour force age 15 and over	8,064,478		6,980			1,187		
Land area (square km)	908,699.31		990.38			160.19		
Inhabited area (square km)			981.21			237.88		
POPULATION AGE								
Population age 0-14	2,276,950	15.50%	2,045	13.48%	87	310	15.66%	101
Population age 15-24	1,854,732	12.62%	1,885	12.43%	98	245	12.37%	98
Population age 25-34	2,061,351	14.03%	1,610	10.62%	76	255	12.87%	92
Population age 35-44	1,923,523	13.09%	1,480	9.76%	75	202	10.17%	78
Population age 45-54	1,860,941	12.66%	1,815	11.97%	95	238	12.01%	95
Population age 55-64	2,019,965	13.75%	2,637	17.39%	126	350	17.67%	129
Population age 65+	2,696,366	18.35%	3,694	24.35%	133	381	19.24%	105
DWELLING								
Total number of occupied private dwellings	5,700,851		6,385			881		
Average dwelling value \$	\$814,224		\$311,417		38	\$322,167		40
Home owners	3,973,295	69.70%	5,305	83.08%	119	765	86.81%	125
Home tenants	1,717,205	30.12%	1,080	16.92%	56	116	13.19%	44
Band housing	10,486	0.18%	0	0.00%	0	0	0.00%	0
HOUSEHOLDS								
One-family households	3,837,758	67.33%	4,261	66.73%	99	617	70.07%	104
Multiple-family households	162,446	2.85%	55	0.86%	30	7	0.83%	29
Non-family households	1,699,975	29.82%	1,893	29.65%	99	237	26.87%	90
EDUCATION								
or degree	12,416,879		13,121			1,671		
No certificate, diploma, or degree	2,175,333	17.52%	2,870	21.87%	125	334	19.97%	114
High school diploma or equivalent	3,384,448	27.26%	3,900	29.72%	109	503	30.09%	110
Post-secondary certificate, diploma, or degree	6,857,098	55.22%	6,351	48.40%	88	835	49.94%	90
Apprenticeship or trades certificate or diploma	747,204	6.02%	1,548	11.80%	196	166	9.94%	165
College, CEGEP or other non-university certificate or diploma	2,572,424	20.72%	2,886	21.99%	106	427	25.57%	123
University certificate or diploma below bachelor level	289,194	2.33%	302	2.30%	99	25	1.51%	65
University certificate, diploma, or degree at bachelor level or above	3,248,275	26.16%	1,615	12.31%	47	216	12.92%	49
Bachelor's degree	2,130,762	17.16%	1,142	8.70%	51	138	8.28%	48

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	

Table 4-2. Trade Area Populations Projections Summary 2021 to 2031
 (Source: Manifold Data Mining Inc & FBM)



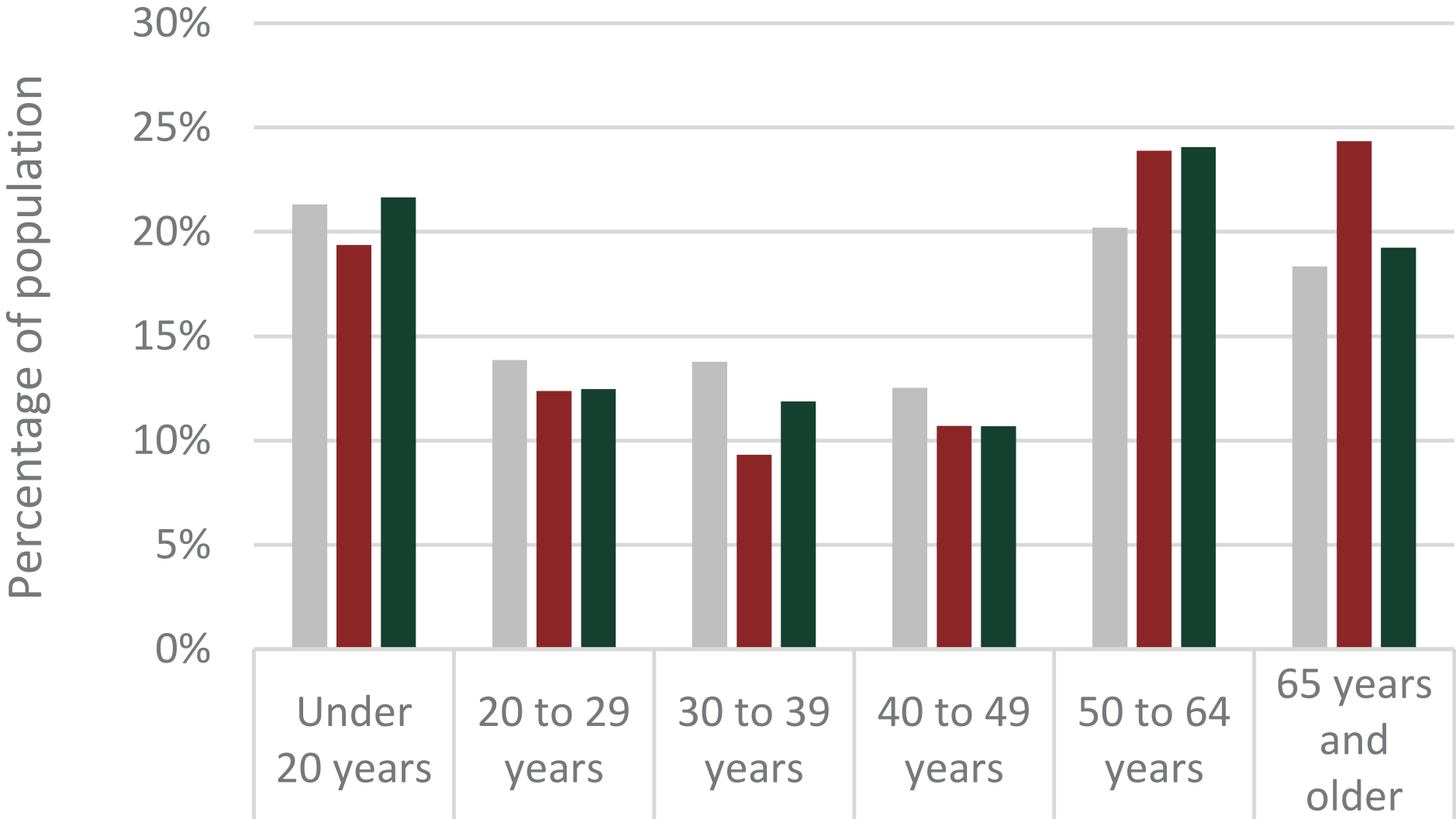
Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
PROJECTIONS								
Annual population growth in the period: Next 3 years		1.00%		-0.09%	-9		-0.03%	-3
Annual household growth in the period: Next 3 years		1.00%		0.25%	25		0.32%	32
Annual family growth in the period: Next 3 years		1.00%		0.11%	11		0.09%	9
Annual population growth in the period: Next 5 years		1.15%		-0.04%	-3		0.05%	4
Annual household growth in the period: Next 5 years		1.35%		0.47%	35		0.58%	43
Annual family growth in the period: Next 5 years		1.16%		0.25%	22		0.23%	20
Annual population growth in the period: 5 to 10 years from current year		1.08%		-0.12%	-11		0.01%	1
Annual household growth in the period: 5 to 10 years from current year		1.27%		0.40%	31		0.53%	42
Annual family growth in the period: 5 to 10 years from current year		1.08%		0.23%	21		0.23%	21
POPULATION GROWTH								
Current year total population	14,693,829		15,166			1,982		
3-Year Projections - Total population	15,211,613		15,101			1,979		
5-Year Projections - Total population	15,556,803		15,133			1,987		
10-Year Projections - Total population	16,413,919		15,047			1,987		
HOUSEHOLD GROWTH								
Current year total number of households	5,700,179		6,385			881		
3-Year Projections - Total number of households	5,937,405		6,465			895		
5-Year Projections - Total number of households	6,095,555		6,538			907		
10-Year Projections - Total number of households	6,492,049		6,669			931		
FAMILY GROWTH								
Current year total number of census families	4,092,674		4,480			586		
3-Year Projections - Total number of census families	4,238,366		4,505			588		
5-Year Projections - Total number of census families	4,335,163		4,536			593		
10-Year Projections - Total number of census families	4,575,107		4,591			599		
HOUSEHOLD INCOME GROWTH								
Current year average household income	\$109,708		\$87,212		79	\$106,925		97
3-Year Projections - Average household income	\$115,000		\$89,471		78	\$109,397		95
5-Year Projections - Average household income	\$122,372		\$92,705		76	\$112,942		92
10-Year Projections - Average household income	\$141,088		\$100,151		71	\$120,136		85

Table 4-3. Trade Area Population Breakdown
 (Source: Manifold Data Mining Inc & FBM)



Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
POPULATION AGE GROUP								
Total population by age groups	14,693,800		15,166			1,982		
0-14	2,276,950	15.50%	2,045	13.48%	87	310	15.66%	101
0-4	734,336	5.00%	633	4.17%	83	100	5.05%	101
5-9	754,020	5.13%	652	4.30%	84	103	5.19%	101
10-14	788,594	5.37%	759	5.01%	93	108	5.43%	101
15-64	9,720,510	66.15%	9,428	62.16%	94	1,290	65.10%	98
15-19	854,434	5.82%	894	5.89%	101	119	6.00%	103
20-24	1,000,300	6.81%	992	6.54%	96	126	6.37%	94
25-29	1,035,480	7.05%	884	5.83%	83	121	6.09%	86
30-34	1,025,870	6.98%	726	4.79%	69	134	6.78%	97
35-39	997,205	6.79%	686	4.53%	67	101	5.10%	75
40-44	926,318	6.30%	794	5.23%	83	100	5.07%	80
45-49	913,795	6.22%	829	5.47%	88	111	5.62%	90
50-54	947,146	6.45%	986	6.50%	101	127	6.40%	99
55-59	1,044,800	7.11%	1,336	8.81%	124	179	9.03%	127
60-64	975,162	6.64%	1,301	8.58%	129	171	8.64%	130
65 and over	2,696,370	18.35%	3,694	24.35%	133	381	19.24%	105
65-69	820,064	5.58%	1,137	7.50%	134	118	5.96%	107
70-74	691,318	4.71%	953	6.28%	133	99	4.98%	106
75-79	479,309	3.26%	713	4.70%	144	73	3.66%	112
80-84	328,259	2.23%	444	2.93%	131	44	2.20%	99
85 and over	377,417	2.57%	446	2.94%	114	48	2.44%	95
85-89	235,644	1.60%	247	1.63%	102	25	1.28%	80
90-94	109,852	0.75%	144	0.95%	127	13	0.65%	87
95-99	27,679	0.19%	52	0.34%	179	8	0.42%	221
100 and over	4,241	0.03%	3	0.02%	67	2	0.08%	267
Average age of total population	41.60		45.40		109	42.70		103
Median age of total population	40.90		48.40		118	43.90		107

Figure 4-4. Population Breakdown
(Source: Manifold Data Mining Inc & FBM)



■ Ontario	21.32%	13.86%	13.77%	12.52%	20.20%	18.35%
■ Alexandria Trade Area	19.37%	12.37%	9.32%	10.70%	23.89%	24.35%
■ Maxville Trade Area	21.66%	12.46%	11.88%	10.69%	24.07%	19.24%

Table 4-4. Trade Area Household Income Breakdown
 (Source: Manifold Data Mining Inc & FBM)



Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
HOUSEHOLD INCOME								
Total number of households	5,700,990		6,385			881		
Average household income \$	\$109,708		\$87,212		79	\$106,925		97
Median household income \$	\$83,780		\$71,700		86	\$87,390		104
Household with income under \$5,000	72,619	1.27%	43	0.67%	53	6	0.72%	57
Household with income \$5,000 to \$9,999	79,143	1.39%	60	0.94%	68	6	0.71%	51
Household with income \$10,000 to \$14,999	126,272	2.22%	142	2.22%	100	9	1.05%	47
Household with income \$15,000 to \$19,999	178,443	3.13%	233	3.65%	117	20	2.32%	74
Household with income \$20,000 to \$24,999	203,141	3.56%	315	4.93%	138	33	3.74%	105
Household with income \$25,000 to \$29,999	207,866	3.65%	305	4.77%	131	34	3.84%	105
Household with income \$30,000 to \$34,999	217,630	3.82%	326	5.11%	134	35	3.94%	103
Household with income \$35,000 to \$39,999	225,307	3.95%	329	5.15%	130	35	3.97%	101
Household with income \$40,000 to \$44,999	228,807	4.01%	310	4.85%	121	36	4.07%	101
Household with income \$45,000 to \$49,999	230,344	4.04%	283	4.43%	110	35	3.93%	97
Household with income \$50,000 to \$59,999	365,998	6.42%	433	6.78%	106	55	6.21%	97
Household with income \$60,000 to \$69,999	389,116	6.83%	480	7.52%	110	68	7.75%	113
Household with income \$70,000 to \$79,999	377,680	6.63%	474	7.43%	112	66	7.46%	113
Household with income \$80,000 to \$89,999	356,636	6.26%	457	7.15%	114	64	7.29%	116
Household with income \$90,000 to \$99,999	335,299	5.88%	418	6.54%	111	65	7.38%	126
Household with income \$100,000 and over	2,106,690	36.95%	1,778	27.85%	75	314	35.61%	96
Household with income \$100,000 to \$124,999	530,864	9.31%	510	7.99%	86	81	9.16%	98
Household with income \$125,000 to \$149,999	468,682	8.22%	416	6.52%	79	81	9.20%	112
Household with income \$150,000 to \$199,999	496,435	8.71%	360	5.64%	65	72	8.13%	93
Household with income \$200,000 and over	610,705	10.71%	491	7.70%	72	80	9.10%	85

Figure 4-5. Population Income Breakdown
(Source: Manifold Data Mining Inc & FBM)

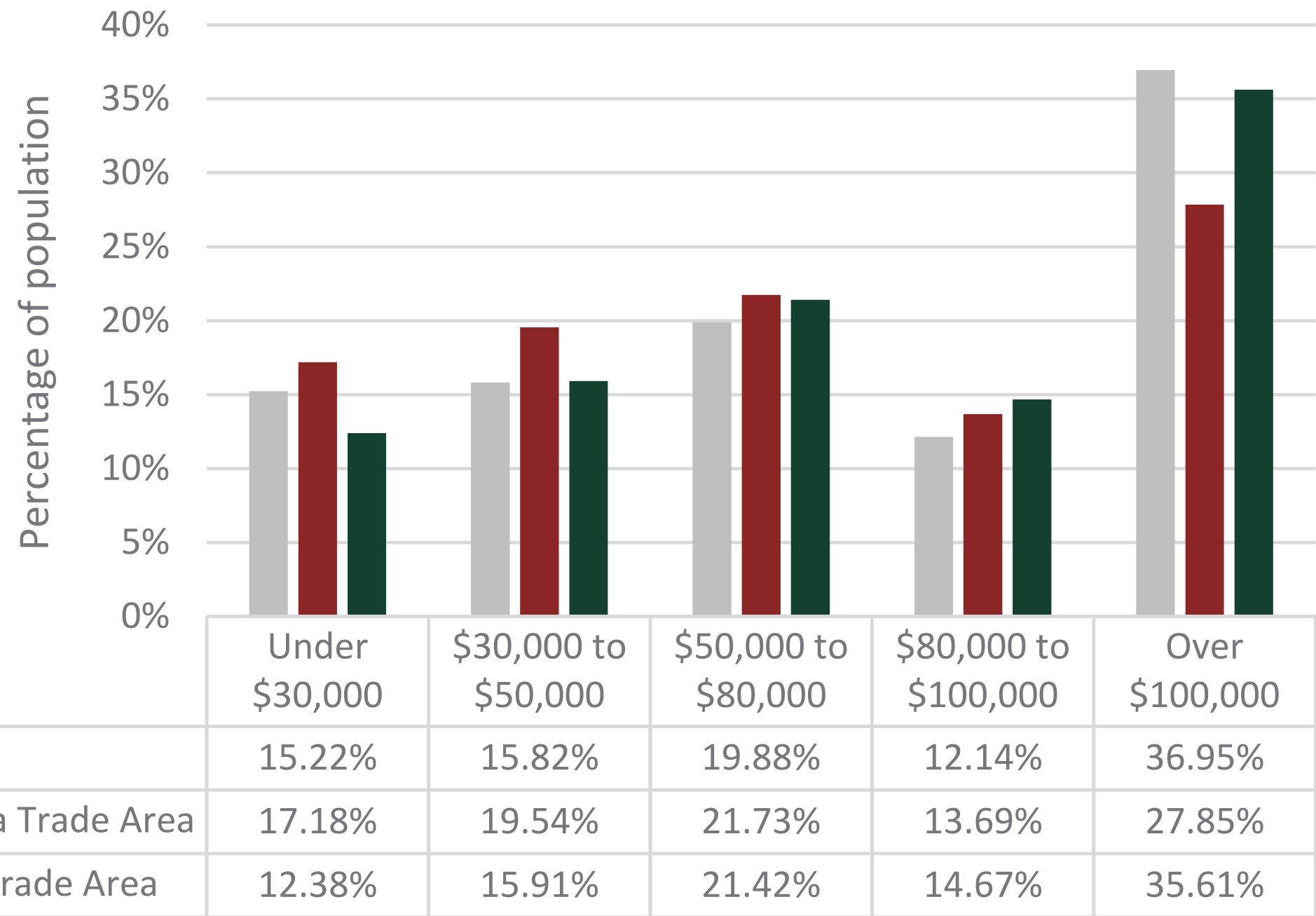


Table 4-5. Revised Population Growth Forecast Scenarios - Low/Moderate/High
 (Source: Manifold Data Mining Inc & FBM)



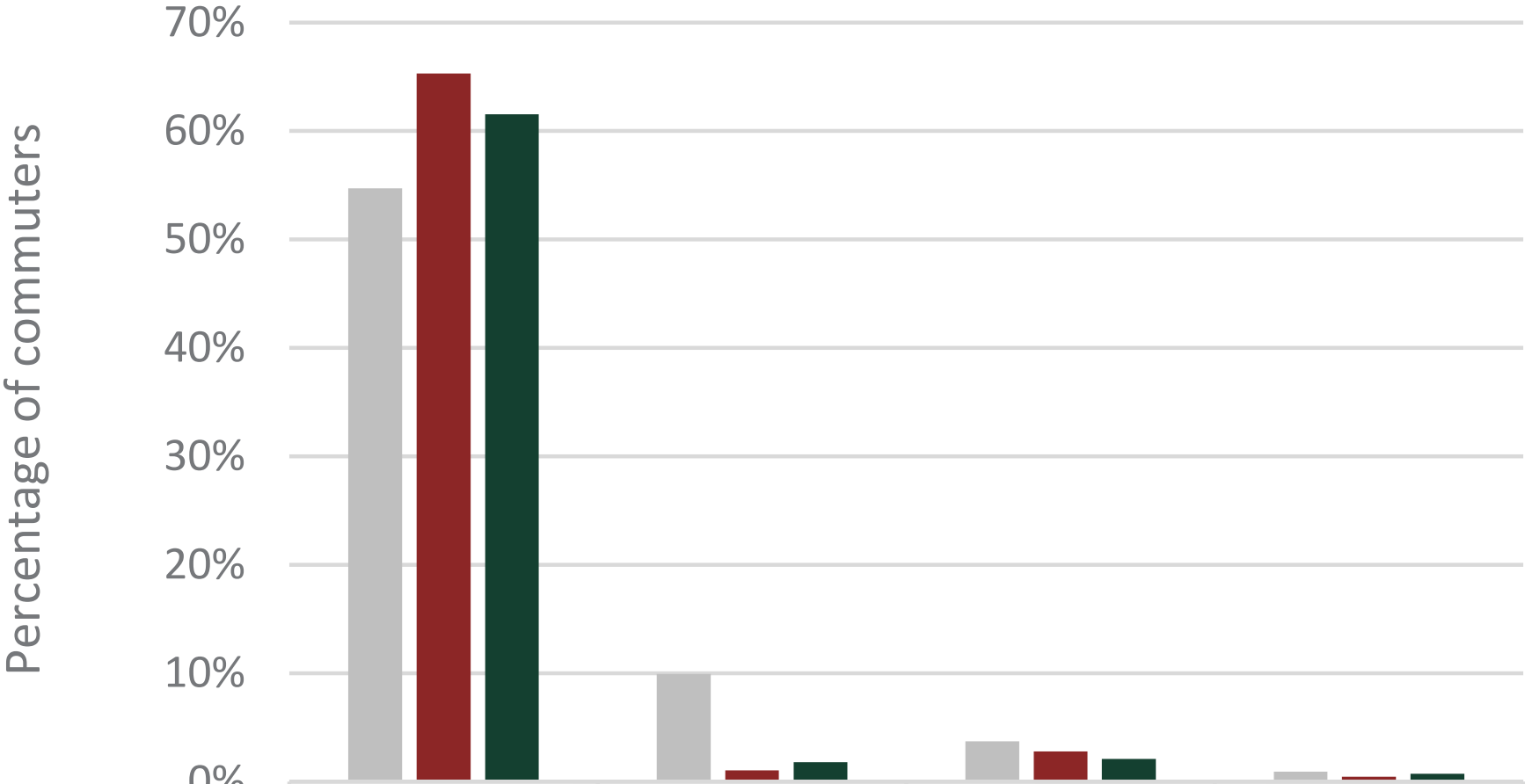
Attribute	Alexandria Trade Area		Maxville Trade Area	
	value	percent per year	value	percent per year
POPULATION GROWTH - REVISED LOW GROWTH SCENARIO				
Current year total population	15,166		1,982	
3-Year Projections - Total population	15,280	0.25%	1,988	0.1%
5-Year Projections - Total population	15,357	0.25%	1,992	0.1%
10-Year Projections - Total population	15,549	0.25%	2,002	0.1%
POPULATION GROWTH - REVISED MODERATE GROWTH SCENARIO				
Current year total population	15,166	0.5%	1,982	0.3%
3-Year Projections - Total population	15,395	0.5%	1,997	0.3%
5-Year Projections - Total population	15,549	0.5%	2,007	0.3%
10-Year Projections - Total population	15,942	0.5%	2,032	0.3%
POPULATION GROWTH - REVISED HIGH GROWTH SCENARIO				
Current year total population	15,166	1.0%	1,982	0.5%
3-Year Projections - Total population	15,626	1.0%	2,012	0.5%
5-Year Projections - Total population	15,940	1.0%	2,032	0.5%
10-Year Projections - Total population	16,753	1.0%	2,083	0.5%
POPULATION GROWTH - REVISED HIGH GROWTH SCENARIO				
Change in population from current forecasts to new LOW growth scenario	502		15	
Change in population from current forecasts to new MEDIUM growth scenario	895		45	
Change in population from current forecasts to new HIGH growth scenario	1,706		96	

Table 4-6. Labour Force Information
(Source: Manifold Data Mining Inc & FBM)



Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
LABOUR FORCE ACTIVITY - TOTAL								
Total population 15+ years	12,416,900		13,122			1,671		
In the labour force	8,064,480	64.95%	6,980	53.19%	82	1,187	71.04%	109
Employed	7,328,310	59.02%	6,472	49.32%	84	1,088	65.07%	110
Unemployed	736,167	5.93%	507	3.87%	65	100	5.97%	101
Not in the labour force	4,352,400	35.05%	6,142	46.81%	134	484	28.96%	83
Participation rate (%)		64.95%		53.19%	82		71.04%	109
Employment rate (%)		59.02%		49.32%	84		65.07%	110
Unemployment rate (%)		9.13%		7.27%	80		8.40%	92
PLACE OF WORK								
Total employed labour force 15 years and over by place of work status	7,328,310		6,472			1,088		
At home	1,439,460	17.85%	1,373	19.68%	110	246	20.70%	116
Outside Canada	45,328	0.56%	15	0.21%	38	3	0.25%	45
No fixed workplace address	711,518	8.82%	728	10.43%	118	109	9.16%	104
Usual place of work	5,132,010	63.64%	4,356	62.41%	98	730	61.48%	97
COMMUTING DURATION								
Total employed population aged 15 years and over who commute to work	5,659,350		4,946			807		
Less than 15 minutes	1,970,080	24.43%	1,976	28.32%	116	257	21.68%	89
15 to 29 minutes	1,613,930	20.01%	1,270	18.20%	91	211	17.80%	89
30 to 44 minutes	988,783	12.26%	811	11.62%	95	155	13.09%	107
45 to 59 minutes	614,867	7.62%	497	7.12%	93	112	9.40%	123
60 minutes and over	471,699	5.85%	392	5.61%	96	71	6.01%	103
MODE OF TRANSPORTATION								
Total employed labour force 15 years and over who commute to work by mode of transportation	5,659,350		4,946			807		
Car, truck, van, as driver	4,060,840	50.36%	4,320	61.90%	123	702	59.16%	117
Car, truck, van, as passenger	351,545	4.36%	238	3.41%	78	28	2.39%	55
Public transit	802,499	9.95%	73	1.05%	11	21	1.79%	18
Walked	301,081	3.73%	195	2.80%	75	25	2.09%	56
Bicycle	75,372	0.94%	31	0.45%	48	9	0.73%	78
Other method	68,010	0.84%	88	1.26%	150	22	1.82%	217

Figure 4-6. Mode of Transportation to Work
(Source: Manifold Data Mining Inc & FBM)



	Vehicle	Transit	Walk	Bike
■ Ontario	54.72%	9.95%	3.73%	0.94%
■ Alexandria Trade Area	65.31%	1.05%	2.80%	0.45%
■ Maxville Trade Area	61.55%	1.79%	2.09%	0.73%



Table 4-7.
Labour Force
Industry and
Occupation
(Source:
Manifold Data
Mining Inc &
FBM)

Attribute	Benchmark- Ontario		Alexandria Trade Area			Maxville Trade Area		
	value	percent	value	percent	index	value	percent	index
LABOUR FORCE INDUSTRY								
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	8,064,480		6,980			1,187		
Industry - not applicable	343,153	4.26%	75	1.07%	25	0	0.00%	0
All industries	7,721,320	95.75%	6,905	98.93%	103	1,187	100.00%	104
11 Agriculture, forestry, fishing, and hunting	118,861	1.47%	265	3.80%	259	51	4.33%	295
21 Mining, quarrying, and oil and gas extraction	40,419	0.50%	14	0.21%	42	0	0.00%	0
22 Utilities	69,595	0.86%	51	0.73%	85	0	0.00%	0
23 Construction	506,432	6.28%	312	4.48%	71	124	10.48%	167
31-33 Manufacturing	750,077	9.30%	850	12.18%	131	129	10.90%	117
41 Wholesale trade	315,938	3.92%	458	6.56%	167	53	4.42%	113
44-45 Retail trade	863,803	10.71%	1,363	19.52%	182	131	11.04%	103
48-49 Transportation and warehousing	353,144	4.38%	452	6.47%	148	73	6.15%	140
51 Information and cultural industries	187,048	2.32%	34	0.48%	21	0	0.00%	0
52 Finance and insurance	461,838	5.73%	179	2.57%	45	83	6.98%	122
53 Real estate and rental and leasing	186,741	2.32%	51	0.73%	31	0	0.00%	0
54 Professional, scientific, and technical services	663,596	8.23%	444	6.36%	77	43	3.61%	44
55 Management of companies and enterprises	17,706	0.22%	16	0.23%	105	0	0.00%	0
56 Administrative and support, waste management and remediation services	357,540	4.43%	160	2.30%	52	49	4.16%	94
61 Educational services	613,506	7.61%	195	2.79%	37	0	0.01%	0
62 Health care and social assistance	835,061	10.36%	910	13.04%	126	211	17.77%	172
71 Arts, entertainment, and recreation	158,129	1.96%	61	0.88%	45	46	3.87%	197
72 Accommodation and food services	430,367	5.34%	340	4.88%	91	42	3.57%	67
81 Other services (except public administration)	317,074	3.93%	509	7.30%	186	98	8.25%	210
91 Public administration	474,450	5.88%	240	3.44%	59	53	4.44%	76
OCCUPATION								
Total labour force 15 years and over by occupation	8,064,480		6,980			1,187		
Occupation - not applicable	343,153	4.26%	75	1.07%	25	0	0.00%	0
All occupations	7,721,320	95.75%	6,905	98.93%	103	1,187	100.00%	104
0 Management occupations	914,818	11.34%	935	13.40%	118	157	13.25%	117
1 Business, finance, and administration occupations	1,302,860	16.16%	991	14.20%	88	132	11.12%	69
2 Natural and applied sciences and related occupations	625,194	7.75%	405	5.80%	75	46	3.86%	50
3 Health occupations	519,714	6.44%	525	7.52%	117	105	8.84%	137
4 Occupations in education, law and social, community and government services	994,518	12.33%	666	9.54%	77	109	9.21%	75
5 Occupations in art, culture, recreation, and sport	232,438	2.88%	32	0.46%	16	0	0.00%	0
6 Sales and service occupations	1,643,380	20.38%	1,526	21.86%	107	208	17.52%	86
7 Trades, transport and equipment operators and related occupations	983,586	12.20%	1,285	18.41%	151	314	26.46%	217
8 Natural resources, agriculture, and related production occupations	128,639	1.60%	145	2.08%	130	69	5.84%	365
9 Occupations in manufacturing and utilities	376,174	4.67%	395	5.66%	121	46	3.89%	83

Table 4-8. Trade Area Retail Spending Potential **2021**
(Source: Manifold Data Mining Inc & FBM)



Retail Spending by Merchandise Category		2021		2021		2021		2021	
		ALEXANDRIA TRADE AREA Per Household Retail Spending	ALEXANDRIA TRADE AREA Aggregate Retail Spending	MAXVILLE TRADE AREA Per Household Retail Spending	MAXVILLE TRADE AREA Aggregate Retail Spending	SECONDARY TRADE AREA Per Household Retail Spending	SECONDARY TRADE AREA Aggregate Retail Spending	Misc Inflow Factor	Alexandria Maxville Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$7,056	\$38,838,227	\$8,046	\$7,088,228	\$9,502	\$35,026,134	10.0%	\$4,592,646
	Pharmacy	\$710	\$3,906,362	\$745	\$656,731	\$816	\$3,009,043	10.0%	\$456,309
	Alcohol & Tobacco	\$1,108	\$6,098,049	\$1,219	\$1,074,337	\$1,839	\$6,776,801	2.5%	\$179,310
	Personal Services	\$2,103	\$11,577,191	\$2,597	\$2,288,318	\$2,374	\$8,750,223	5.0%	\$693,275
	Health Care & Medical Services	\$440	\$2,423,532	\$496	\$436,636	\$634	\$2,335,423	10.0%	\$286,017
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$1,690	\$9,299,626	\$2,150	\$1,894,470	\$2,078	\$7,659,850	1.0%	\$111,941
	Jewelry	\$135	\$744,628	\$177	\$155,836	\$110	\$406,469	0.5%	\$4,502
	Beauty & Personal Care	\$633	\$3,484,060	\$757	\$667,124	\$679	\$2,503,804	5.0%	\$207,559
	Home Furniture & Décor	\$847	\$4,663,974	\$993	\$874,686	\$848	\$3,124,398	2.5%	\$138,466
	Appliances & Electronics	\$1,319	\$7,260,009	\$1,546	\$1,362,009	\$1,475	\$5,436,821	1.0%	\$86,220
	Home Improvement & Gardening	\$2,822	\$15,530,571	\$3,006	\$2,648,013	\$2,690	\$9,917,109	2.5%	\$454,465
	Books & Media	\$688	\$3,789,504	\$1,099	\$968,360	\$829	\$3,054,635	0.0%	\$0
	Sporting Goods	\$204	\$1,121,059	\$279	\$245,802	\$244	\$899,219	0.0%	\$0
	Toys & Hobbies	\$239	\$1,315,029	\$294	\$259,352	\$218	\$804,659	0.0%	\$0
Leisure, Recreation & Entertainment Goods/Services	Specialty Retail	\$864	\$4,755,719	\$1,019	\$897,885	\$852	\$3,139,924	5.0%	\$282,680
	Quick Service F&B	\$1,474	\$8,114,487	\$1,679	\$1,479,627	\$2,331	\$8,592,014	10.0%	\$959,411
	Restaurants & Pubs	\$1,367	\$7,523,429	\$1,608	\$1,416,970	\$1,545	\$5,693,204	5.0%	\$447,020
	Arts & Entertainment	\$124	\$680,414	\$162	\$142,589	\$132	\$485,707	1.0%	\$8,230
Automotive Goods (excluding repair)	Fitness & Leisure	\$275	\$1,515,499	\$354	\$311,713	\$264	\$973,882	0.0%	\$0
	Auto Parts & Accessories	\$1,542	\$8,487,438	\$1,905	\$1,678,158	\$1,780	\$6,560,114	5.0%	\$508,280
	Auto/RV/Motorsports Dealership	\$2,969	\$16,338,982	\$3,412	\$3,005,589	\$4,354	\$16,049,360	2.5%	\$483,614
TOTAL CATEGORIES		\$30,252	\$166,509,098	\$35,552	\$31,320,986	\$37,635	\$138,721,291	5.3%	\$10,440,439
TOTAL (excluding Health Care & Auto)		\$23,659	\$130,217,835	\$27,732	\$24,432,050	\$28,826	\$106,253,895		\$8,622,035

Table 4-9. Trade Area Retail Spending Potential **2031**
(Source: Manifold Data Mining Inc & FBM)



Retail Spending by Merchandise Category		2031		2031		2031		2031	
		ALEXANDRIA TRADE AREA Per Household Retail Spending	ALEXANDRIA TRADE AREA Aggregate Retail Spending	MAXVILLE TRADE AREA Per Household Retail Spending	MAXVILLE TRADE AREA Aggregate Retail Spending	SECONDARY TRADE AREA Per Household Retail Spending	SECONDARY TRADE AREA Aggregate Retail Spending	Misc Inflow Factor	Alexandria Maxville Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$7,795	\$44,725,505	\$8,887	\$8,274,185	\$10,497	\$42,910,295	10.0%	\$5,299,969
	Pharmacy	\$784	\$4,498,507	\$823	\$766,611	\$902	\$3,686,360	10.0%	\$526,512
	Alcohol & Tobacco	\$1,224	\$7,022,419	\$1,347	\$1,254,088	\$2,031	\$8,302,215	2.5%	\$206,913
	Personal Services	\$2,323	\$13,332,115	\$2,869	\$2,671,184	\$2,622	\$10,719,843	5.0%	\$800,165
	Health Care & Medical Services	\$486	\$2,790,903	\$547	\$509,691	\$700	\$2,861,112	10.0%	\$330,059
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$1,866	\$10,709,306	\$2,375	\$2,211,440	\$2,296	\$9,384,034	1.0%	\$129,207
	Jewelry	\$149	\$857,502	\$195	\$181,910	\$122	\$497,962	0.5%	\$5,197
	Beauty & Personal Care	\$699	\$4,012,189	\$836	\$778,743	\$750	\$3,067,394	5.0%	\$239,547
	Home Furniture & Décor	\$936	\$5,370,961	\$1,097	\$1,021,032	\$936	\$3,827,680	2.5%	\$159,800
	Appliances & Electronics	\$1,457	\$8,360,515	\$1,708	\$1,589,891	\$1,629	\$6,660,614	1.0%	\$99,504
	Home Improvement & Gardening	\$3,117	\$17,884,766	\$3,320	\$3,091,061	\$2,972	\$12,149,387	2.5%	\$524,396
	Books & Media	\$761	\$4,363,934	\$1,214	\$1,130,380	\$915	\$3,742,214	0.0%	\$0
	Sporting Goods	\$225	\$1,290,994	\$308	\$286,928	\$269	\$1,101,628	0.0%	\$0
	Toys & Hobbies	\$264	\$1,514,367	\$325	\$302,745	\$241	\$985,783	0.0%	\$0
Leisure, Recreation & Entertainment Goods/Services	Specialty Retail	\$954	\$5,476,613	\$1,126	\$1,048,113	\$941	\$3,846,701	5.0%	\$326,236
	Quick Service F&B	\$1,629	\$9,344,518	\$1,855	\$1,727,189	\$2,575	\$10,526,022	10.0%	\$1,107,171
	Restaurants & Pubs	\$1,510	\$8,663,865	\$1,777	\$1,654,049	\$1,706	\$6,974,708	5.0%	\$515,896
	Arts & Entertainment	\$137	\$783,554	\$179	\$166,447	\$146	\$595,037	1.0%	\$9,500
Automotive Goods (excluding repair)	Fitness & Leisure	\$304	\$1,745,225	\$391	\$363,867	\$292	\$1,193,096	0.0%	\$0
	Auto Parts & Accessories	\$1,703	\$9,774,003	\$2,104	\$1,958,936	\$1,966	\$8,036,754	5.0%	\$586,647
	Auto/RV/Motorsports Dealership	\$3,279	\$18,815,720	\$3,768	\$3,508,464	\$4,810	\$19,661,969	2.5%	\$558,105
	Auto Fuel	\$1,815	\$10,411,834	\$2,217	\$2,064,458	\$2,254	\$9,215,766	5.0%	\$623,815
TOTAL CATEGORIES		\$33,417	\$191,749,316	\$39,271	\$36,561,410	\$41,572	\$169,946,575	5.3%	\$12,048,637
TOTAL (excluding Auto)		\$26,134	\$149,956,856	\$30,634	\$28,519,862	\$31,842	\$130,170,973		\$9,950,012



Retail Spending by Merchandise Category		2021			
		North Glengarry Sales Productivity (\$psf)	North Glengarry Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$335	59%	\$27,085,444	80,887
	Pharmacy	\$314	95%	\$4,331,860	13,791
	Alcohol & Tobacco	\$360	72%	\$5,199,510	14,457
	Personal Services	\$111	14%	\$2,010,335	18,064
	<i>Health Care & Medical (not applicable)</i>				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$205	35%	\$3,896,743	19,016
	Jewelry	\$318	71%	\$639,000	2,012
	Beauty & Personal Care	\$279	82%	\$3,395,054	12,170
	Home Furniture & Décor	\$168	28%	\$1,528,997	9,120
	Appliances & Electronics	\$162	11%	\$967,203	5,959
	Home Improvement & Gardening	\$175	70%	\$12,788,804	73,288
	Books & Media	\$101	9%	\$414,125	4,120
	Sporting Goods	\$203	62%	\$850,085	4,185
	Toys & Hobbies	\$185	63%	\$994,835	5,373
	Specialty Retail	\$167	71%	\$3,992,255	23,862
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$325	55%	\$5,254,428	20,462
	Restaurants & Pubs	\$257	60%	\$5,321,973	24,938
	Arts & Entertainment	\$213	29%	\$238,292	2,582
	Fitness & Leisure	\$92	42%	\$763,370	7,241
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$105	68%	\$6,880,501	25,421
	Auto/RV/Motorsports Dealerships	\$271	91%	\$17,659,481	69,654
	<i>Auto Fuel (not applicable)</i>				

Table 7-1. Estimated Market Share Retention of Retail Spending in North Glengarry 2021

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2031				2021 to 2031	
		North Glengarry Sales Productivity (\$psf)	North Glengarry Estimated Market Share	Market Share Sales \$	Total New Retail Floorspace (sf)	Current City Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$335	59%	\$31,256,933	12,458	80,887	12,458
	Pharmacy	\$314	95%	\$4,998,310	2,122	13,791	2,122
	Alcohol & Tobacco	\$360	72%	\$5,999,926	2,226	14,457	2,226
	Personal Services	\$111	14%	\$2,320,289	2,785	18,064	2,785
	Health Care & Medical (not applicable)						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$205	35%	\$4,497,802	2,933	19,016	2,933
	Jewelry	\$318	71%	\$737,602	311	2,012	311
	Beauty & Personal Care	\$279	82%	\$3,918,273	1,875	12,170	1,875
	Home Furniture & Décor	\$168	28%	\$1,764,567	1,405	9,120	1,405
	Appliances & Electronics	\$162	11%	\$1,116,219	918	5,959	918
	Home Improvement & Gardening	\$175	70%	\$14,756,691	11,277	73,288	11,277
	Books & Media	\$101	9%	\$478,225	638	4,120	638
	Sporting Goods	\$203	62%	\$981,350	646	4,185	646
	Toys & Hobbies	\$185	63%	\$1,148,214	828	5,373	828
	Specialty Retail	\$167	71%	\$4,607,393	3,677	23,862	3,677
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$325	55%	\$6,063,665	-1,805	20,462	-1,805
	Restaurants & Pubs	\$257	60%	\$6,141,969	-1,019	24,938	-1,019
	Arts & Entertainment	\$213	29%	\$275,062	-1,293	2,582	-1,293
	Fitness & Leisure	\$92	42%	\$881,134	2,307	7,241	2,307
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$105	68%	\$7,941,345	49,905	25,421	49,905
	Auto/RV/Motorsports Dealerships	\$271	91%	\$20,379,543	5,640	69,654	5,640
	Auto Fuel (not applicable)						
TOTAL RETAIL CATEGORIES ONLY		\$225	52.7%	\$120,264,511	97,833	436,601	97,833
TOTAL (excluding Auto)		\$240	51.5%	\$91,943,623	42,288 NT	39,120	58,713



Table 7-2.
Estimated Retail Demand by **2031** Based on Maintaining Current Market Share
(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2031				2021 to 2031	
		North Glengarry Sales Productivity (\$psf)	North Glengarry Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current City Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$335	65%	\$34,460,768	22,025	80,887	22,025
	Pharmacy	\$314	105%	\$5,510,636	3,753	13,791	3,753
	Alcohol & Tobacco	\$360	80%	\$6,614,918	3,936	14,457	3,936
	Personal Services	\$111	16%	\$2,558,118	4,922	18,064	4,922
	Health Care & Medical (not applicable)						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$205	38%	\$4,958,827	5,183	19,016	5,183
	Jewelry	\$318	78%	\$813,207	549	2,012	549
	Beauty & Personal Care	\$279	90%	\$4,319,896	3,315	12,170	3,315
	Home Furniture & Décor	\$168	30%	\$1,945,435	2,484	9,120	2,484
	Appliances & Electronics	\$162	12%	\$1,230,632	1,623	5,959	1,623
	Home Improvement & Gardening	\$175	78%	\$16,269,252	19,945	73,288	19,945
	Books & Media	\$101	10%	\$527,243	1,125	4,120	1,125
	Sporting Goods	\$203	69%	\$1,081,938	1,141	4,185	1,141
	Toys & Hobbies	\$185	70%	\$1,265,906	1,464	5,373	1,464
	Specialty Retail	\$167	78%	\$5,079,650	6,499	23,862	6,499
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$325	60%	\$6,685,190	107	20,462	107
	Restaurants & Pubs	\$257	66%	\$6,771,521	1,433	24,938	1,433
	Arts & Entertainment	\$213	32%	\$303,256	-1,161	2,582	-1,161
	Fitness & Leisure	\$92	46%	\$971,450	3,285	7,241	3,285
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$105	75%	\$8,755,333	57,626	25,421	57,626
	Auto/RV/Motorsports Dealerships	\$271	101%	\$22,468,446	13,358	69,654	13,358
	Auto Fuel (not applicable)						
TOTAL RETAIL CATEGORIES ONLY		\$225	58.1%	\$132,591,624	152,613	436,601	152,613
TOTAL (excluding Auto)		\$240	56.8%	\$101,367,845	81,629 NT	39,120	113,493



Table 4-7.
Retail Demand
by **2031** Based
on Increasing
Current Market
Shares by 5%
(Source: FBM &
Manifold Data
Mining Inc)

Appendix B: Resident & Non-Resident Survey



Deloitte.

*Note MDB Insight Inc. was acquired by Deloitte LLP on April 18, 2022.



North Glengarry

Retail Gap Survey 2022 Results

Presented by: MDB Insight

Date: April 2022



Background/ Research Methodology

- North Glengarry hired FBM and MDB Insight to conduct a survey of community members from within North Glengarry and the surrounding areas. The aim of the study was to determine the use of local retailers and any gaps that exist in local shops or services.
- The survey was conducted via an online open-URL survey shared widely with community members in French and English.
- The survey was conducted in March and April, 2022 and gained 410 completed responses.
- Respondents were split into residents of North Glengarry and non-residents and asked a specific set of questions about uses and attitudes towards retailers the area.



Key Findings

- Residents of North Glengarry tended to use retailers in Alexandria frequently for their day-to-day conveniences. Retailers in Maxville were used less frequently.
- Residents of North Glengarry often shopped for bigger-ticket items in Cornwall or Ottawa. Over three quarters of residents were willing to travel more than 30 km for these bigger ticket items.
- Non-residents respondents, many of whom lived in Stormont, Dundas, and South Glengarry visited Alexandria often for their day-today conveniences.
- Clothing/footwear, grocery/specialty foods, house/home décor, and arts/entertainment were some of the commonly-mentioned shops or services that respondents felt were missing from North Glengarry.
- Some of the main issues preventing the respondents from using shops and services in North Glengarry included: Missing specific retailers/merchandise, and cost of good or services.

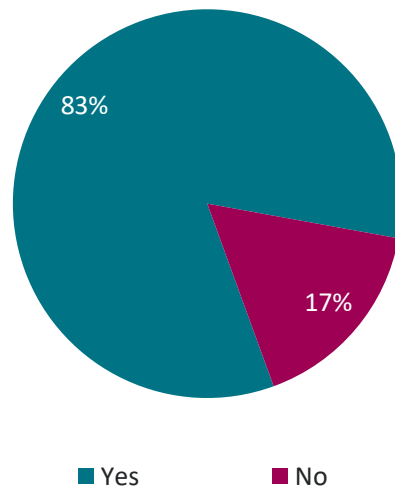
Survey Results

North Glengarry Retail Gap Survey 2022



Survey Segments

Are you a North Glengarry resident?



Respondents were first asked whether or not they were a North Glengarry resident, and were asked a specific set of questions based on their answers. Respondents included 342 residents and 68 non-residents.

n=410

North Glengarry Retail Gap Survey 2022

North Glengarry Residents

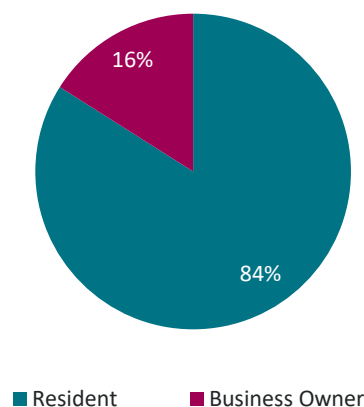
This section includes the responses of 342 residents who responded to the web survey.



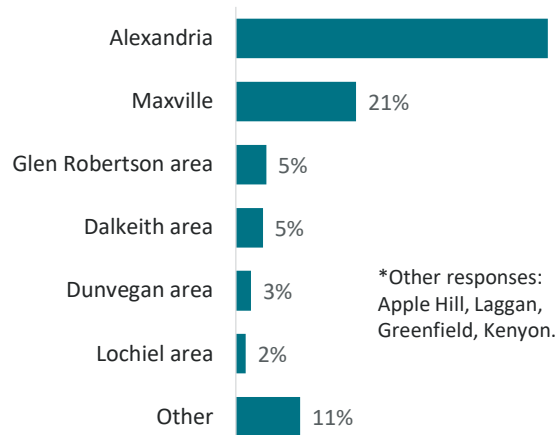
Resident details

Among the residents, 16% of the respondents were also business owners. Alexandria was the community where most resident respondents lived followed by Maxville. Among respondents, 32% worked in Alexandria, and 7% in Maxville.

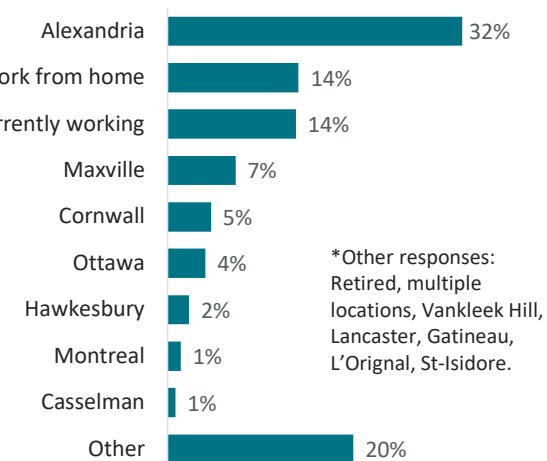
What is your participant status in the community?



In which North Glengarry community do you live?



In which town or city do you primarily work?



n=342

North Glengarry Retail Gap Survey 2022



Resident shopping locations

Residents shopped more often near their homes compared to their places of work. Still, 74% of respondents shopped near their place of work at least some of the time.



n=295

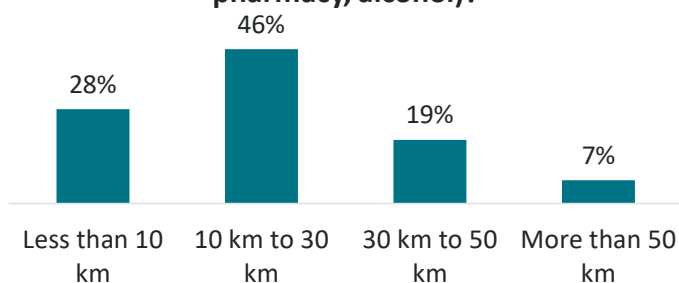
North Glengarry Retail Gap Survey 2022



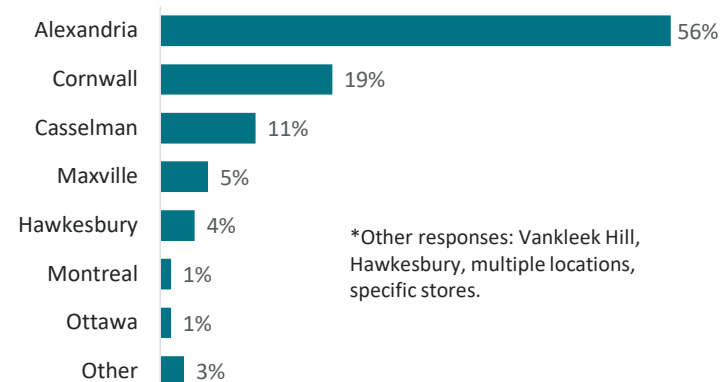
Day-to-day conveniences

Three quarters of the respondents were not willing to travel more than 30 km for their day-to-day conveniences. Most residents preferred to shop in Alexandria for their day-to-day conveniences, and 19% preferred Cornwall.

How far are you prepared to travel for your day-to-day conveniences (grocery, pharmacy, alcohol)?



Where do you prefer to shop for your day-to-day conveniences (grocery, pharmacy, alcohol)?



*Other responses: Vankleek Hill, Hawkesbury, multiple locations, specific stores.

n=342

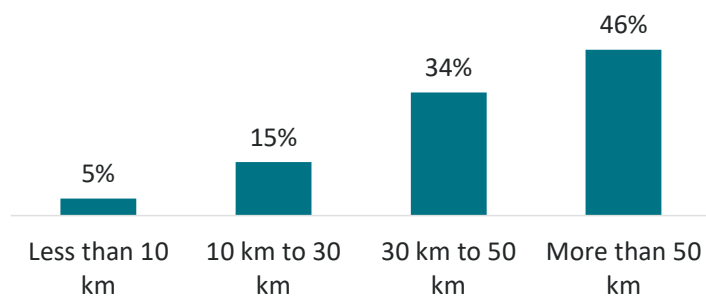
North Glengarry Retail Gap Survey 2022



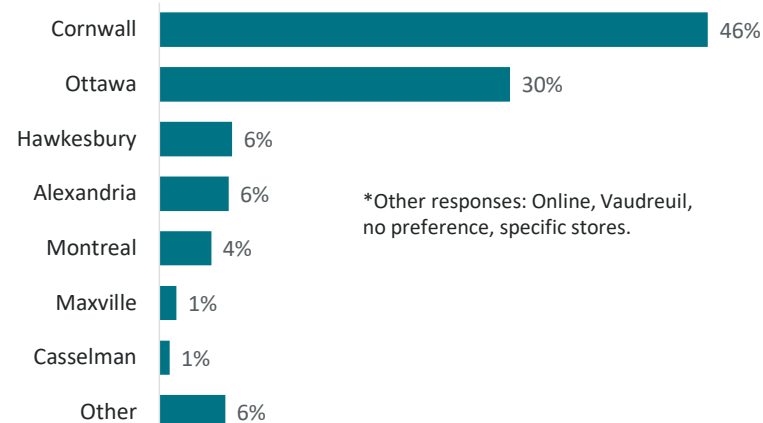
Big ticket items

81% of resident respondents were willing to travel more than 30 km for their bigger ticket items. Cornwall and Ottawa were the top choices for big-ticket item shopping.

How far are you prepared to travel for your bigger ticket items (home/auto/apparel/ electronics etc.)?



Where do you prefer to shop for your bigger ticket items (home/auto/apparel/electronics etc.)?



n=342

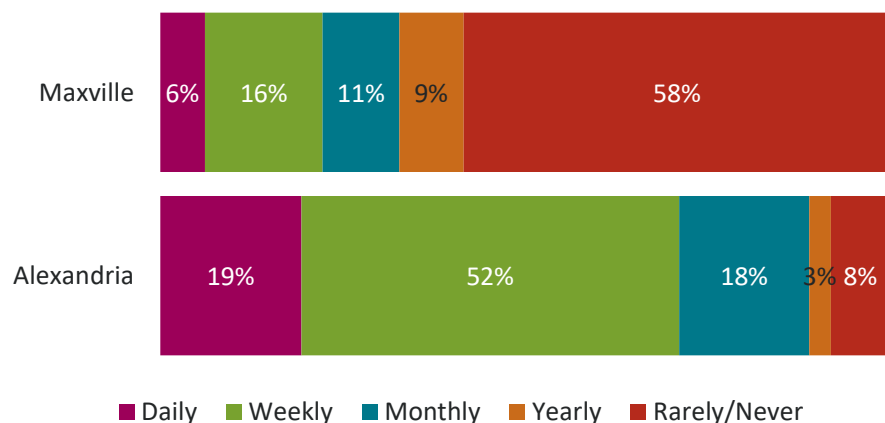
North Glengarry Retail Gap Survey 2022



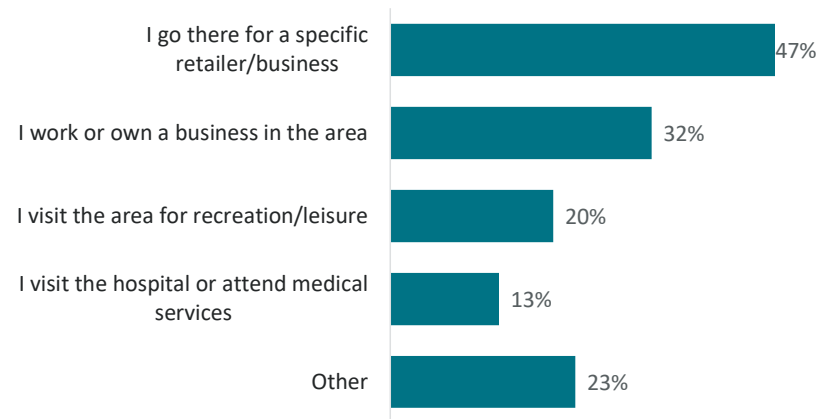
Shopping in Maxville and Alexandria

The majority of residents reported shopping in Alexandria at least weekly, while many residents reported shopping in Maxville yearly or less. Respondents reported visiting Alexandria and Maxville for various shopping, work and leisure-related reasons.

How often do you use shops or services in...



What are your primary reasons for visiting or using shops & services in Alexandria or Maxville?



*Other responses: Proximity to home, support local business, close to children's school.

n=342

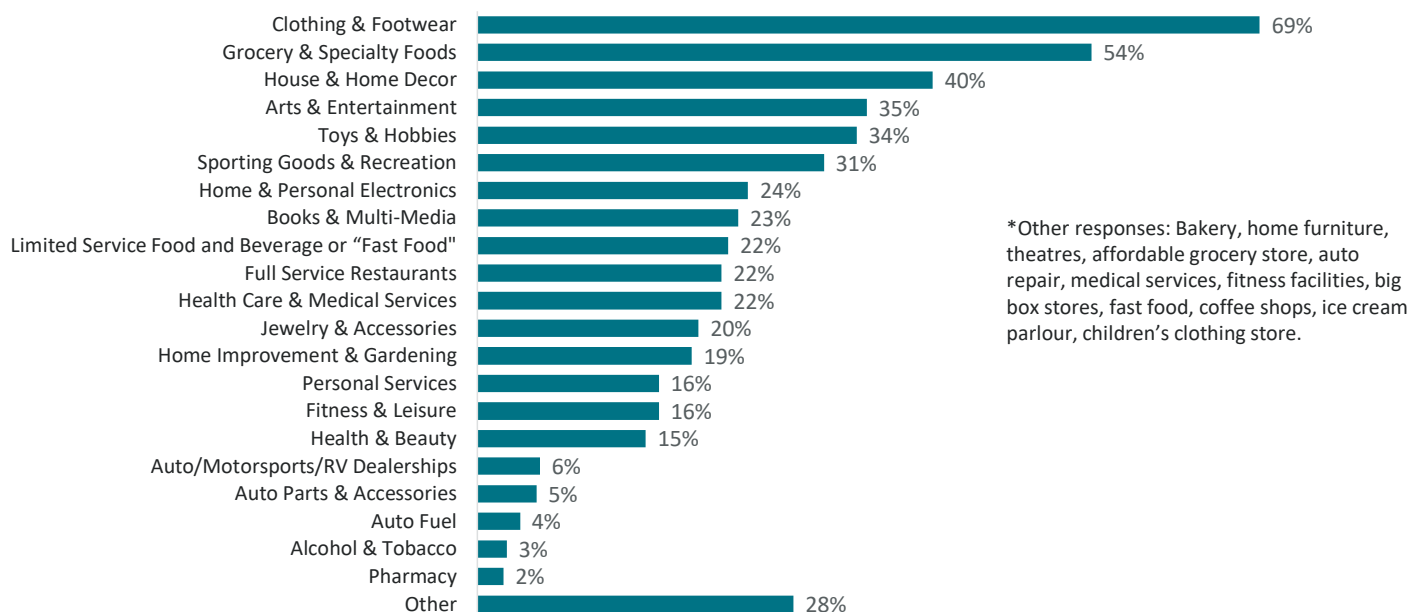
North Glengarry Retail Gap Survey 2022



Shops or services missing from North Glengarry

Clothing/footwear, grocery/specialty foods, and house/home décor were some of the commonly-mentioned shops or services that residents felt were missing from North Glengarry.

What shops or services are missing in North Glengarry?



n=342

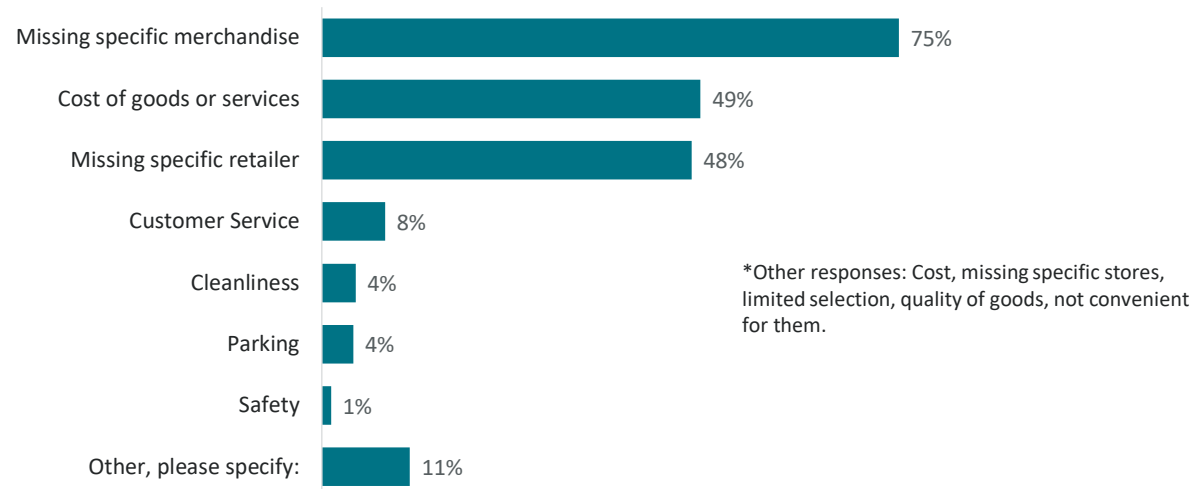
North Glengarry Retail Gap Survey 2022



Reasons for not using North Glengarry Shops & Services

The most commonly-mentioned reasons for residents not using Alexandria or Maxville's shops & services included: the area was missing specific merchandise or the costs were too high.

What are your primary reasons for not using Alexandria or Maxville's Shops & Services?



n=342

North Glengarry Retail Gap Survey 2022

Non-Residents of North Glengarry

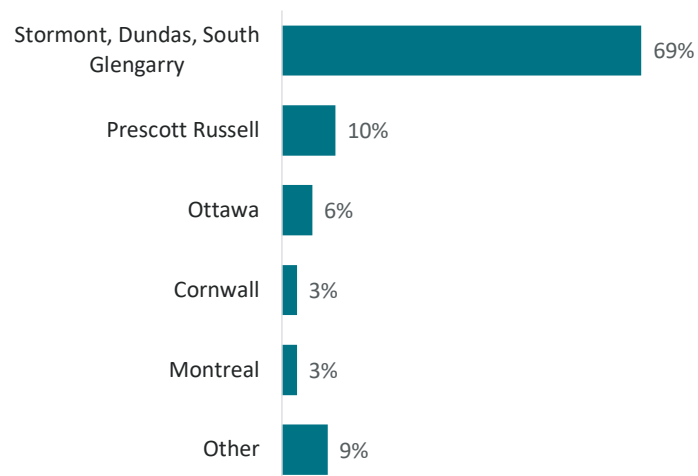
This section includes the responses of 68 non-residents of North Glengarry who responded to the web survey.



Living and working locations

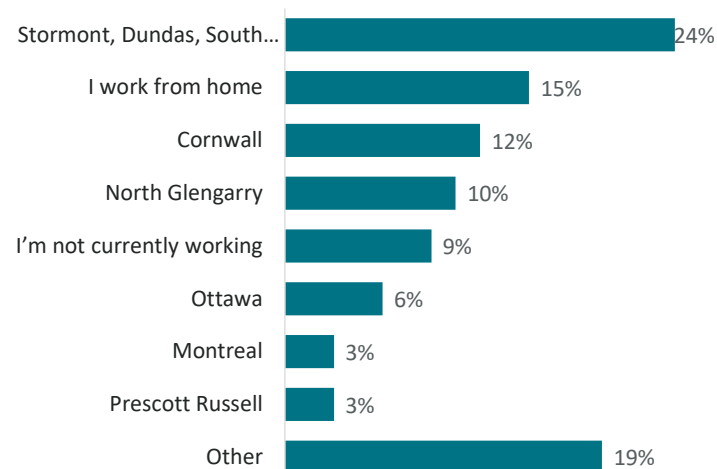
Among non-resident respondents, most were from Stormont, Dundas or South Glengarry. Many of these respondents reported either working in Stormont, Dundas, and South Glengarry or working from home.

In which community do you live?



*Other responses: Kingston, Guelph, Mississauga.

In which town or city do you primarily work?



*Other responses: Retired, Kingston, Guelph, North Lancaster, Toronto.

n=68

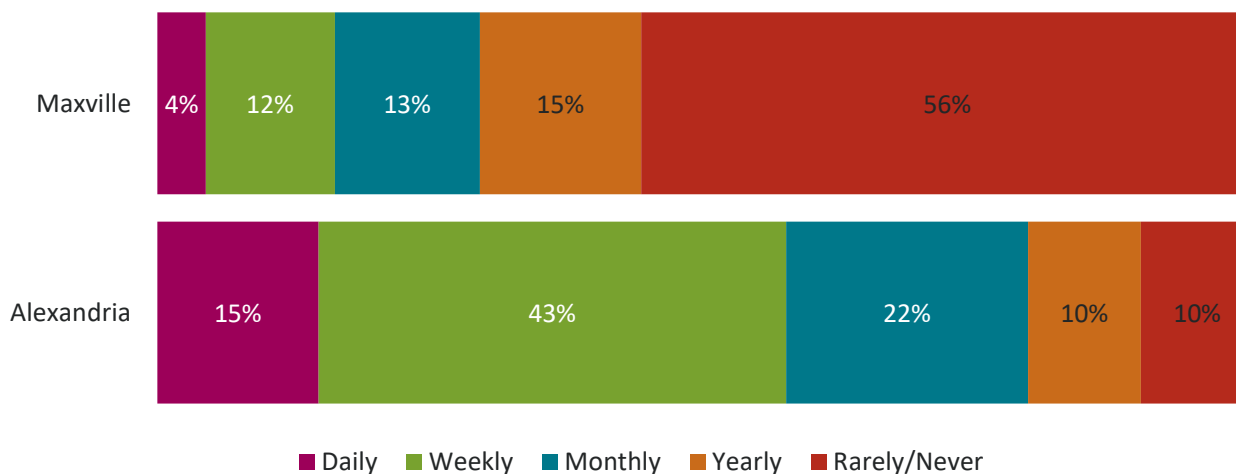
North Glengarry Retail Gap Survey 2022



Use of shops or services in North Glengarry

Over half (58%) of the non-resident respondents reported using shops or services in Alexandria weekly or more. 16% mentioned they used shops or services in Maxville weekly or more.

How often do you use shops or services in...



n=68

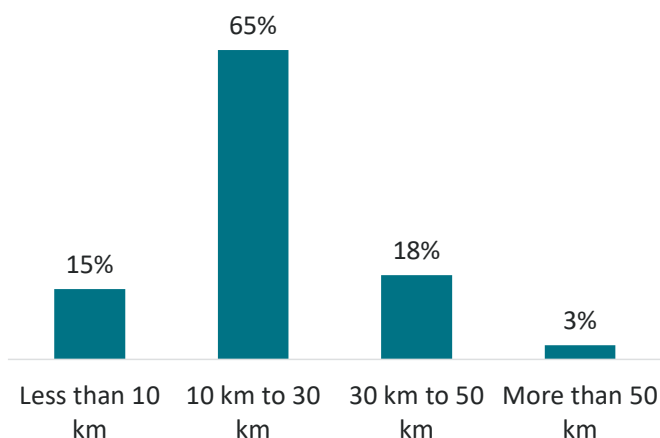
North Glengarry Retail Gap Survey 2022



Travel and shopping behaviour

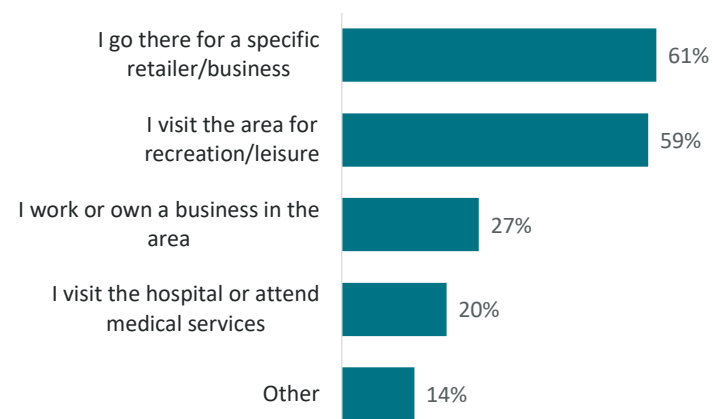
Approximately two thirds of non-residents were prepared to travel between 10-30 km for their day-to-day conveniences. Non-residents often reported that they travel to Alexandria or Maxville for either a specific retailer/business or for recreation/leisure.

How far are you prepared to travel for your day-to-day conveniences (grocery, pharmacy, alcohol)?



n=68

What are your primary reasons for visiting or using shops & services in Alexandria or Maxville? (n=64)



*Other responses: Own a property there, closest town to my house, visit friends.

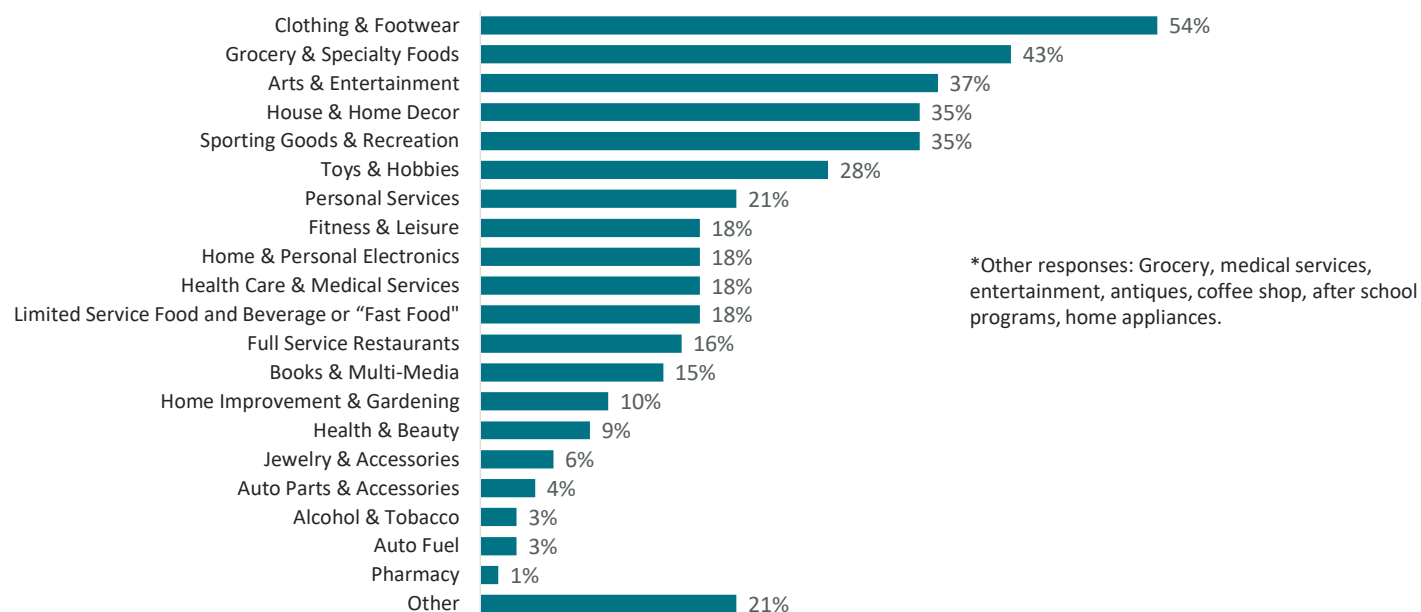
North Glengarry Retail Gap Survey 2022



Shops or services missing from North Glengarry

Non-residents often mentioned that clothing/footwear, grocery/specialty foods and arts/entertainment were missing from North Glengarry.

What shops or services are missing in North Glengarry?



n=68

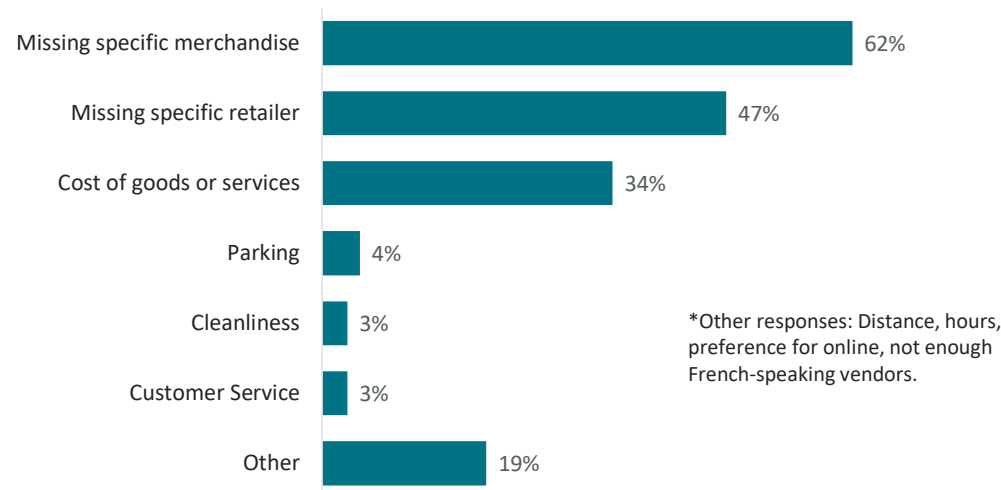
North Glengarry Retail Gap Survey 2022



Reasons for not shopping in North Glengarry

Non-residents primarily mentioned North Glengarry missing specific merchandise or retailers as reason for not using North Glengarry shops or services.

What are your primary reasons for not using Alexandria or Maxville's Shops & Services?



n=68

North Glengarry Retail Gap Survey 2022



Thank You!

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