

APPENDICES

APPENDIX "A"
LITERATURE SEARCH

PRINTED SOURCES

Evaluation of factory outlet/off-price retail markets through printed literature is complicated due to the differences in the Canadian and American approaches to defining a factory outlet. For example, U.S. documents such as Predicasts consistently use the term off-price or discount stores to include factory outlets. Canadian business literature usually includes outlets under retail trade sub-sections. This difference may be accounted for by the general immaturity of the overall factory outlet market in Canada as compared to the United States.

Regardless of the source, the most relevant information available starts in the 1980's. Very few leading texts mention developments in this sector of the retail trade. Consequently, almost all relevant material is found in very specialized business journals or trade publications. Overwhelmingly, the leading industry watcher is Value Retail News, published in Florida. On a monthly basis this organization publishes a wide range of articles on marketing and development of factory outlets/off-price stores under the broader value retailing umbrella. Annually, they also publish the Book of Value Retailing which includes very specific data on hundreds of outlet developers, retailers and tenants. As well, this body can provide leasing software which provides information on current store sites, development strategies and general market conditions.

National trends in retail trade which reflect on factory outlets in the United States are covered by publications such as Stores from the National Retail Merchants Association. Similarly, pertinent information on retail marketing and industry direction is analyzed in Chain Store Age and Shopping Center Age.

A wide range of Canadian and U.S. periodicals report on the factory outlet phenomenon. These include the Financial Post, Financial Times, New York Times, Boston Globe, Wall St. Journal, Forbes, Nation's Business, Globe & Mail, Business Week, Harvard Business Review, Canadian Business, Money, Marketing News, and Marketing.

Developments affecting merchandising and the general industry are explored by the Retail Council of Canada, the U.S. National Shopping Centers Association and the International Council of Shopping Centres.

DATABASES

The most relevant and useful computer database source of information is the Dialog Information Retrieval Service. Utilizing the Dialindex system within this service, current records were identified in relation to factory outlet development. These data include information on developers, retailers, industry watchers, individual companies and broader coverage of the retail trade. Some 320 databases including national and regional newspapers, trade publications, newsletters, business directories, financial reports and corporate press releases are reviewed.

For a large segment of the industry and market analysis, the most relevant databases include:

- PTS Newsletter Database - reports specifically on outlet mall construction development across North America.
- Industry Data Sources - supplies details on retail tenants, shopping center directories, product lines, locations, sales volumes.
- Newsearch - daily index to more than 2000 news items and information articles from local and regional newspapers, periodicals, and business publications. Current information on the impact of factory outlets is found within this database.
- PR Newswire - dispenses complete texts of news releases prepared by companies, trade associations, government agencies and industry watchers. Invaluable in assessing business development plans for corporations in the United States.

- ° PTS PROMT - provides an overview of markets through access to business magazines, government reports, trade journals, and newspapers in North America. Incorporates a large selection of European and Far Eastern documents. It contains very pertinent data for tracing trends in the retail industry.

- ° Cancorp - provides directory, financial and textual information on approximately 5600 public and private corporations. It is useful in assessing individual factory outlet companies and possible developers.

APPENDIX "B"

TELEPHONE SURVEY OF FACTORY OUTLET OPERATORS

APPENDIX "B"

A survey of factory outlet operations in Maine, New Hampshire and, to a lesser extent, Canada was conducted to obtain consistent, detailed information from factory outlet operators. The primary goals of the survey were: .

- to define what constitutes a factory outlet;
- to establish locational criteria for factory outlets;
- to assess problems and opportunities in relation to factory outlets, and;
- to acquire data useful in assessing the applicability of the factory outlet concept for New Brunswick.

A sample of 54 outlets was selected to give a representative cross-section of those outlets retailing products comparable to those produced by New Brunswick manufacturers. Of the sample of 54 outlet operations, 33, or 61%, participated in the survey. Reasons for non-participation include:

- not permitted to discuss operations;
- do not wish to discuss operations;
- manager not available, or
- not a factory outlet or discount operation.

Sampling participation is summarized as follows:

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AREA	CONTACTED	PARTICIPATING
Freeport, Me. area	15	11
Kittery, Me. area	15	11
North Conway, NH area	15	10
Bangor, Me. area	2	1
Chains (Dexter, Bass Shoes)	2	0
Canada	5	0

NOTE: Of the five Canadian firms contacted, three did not return telephone calls, one manager could not be contacted, and one did not consider themselves to be a factory outlet or discount operation.

Attached are:

- copy of questionnaire used in the survey;
- summary of survey results; and
- list of factory outlets participating in the survey.

Highlights

Location was considered to be critical to the operating success of the participating factory outlets, the key locational variables being:

- proximity to significant traffic volumes;
- proximity to other factory outlets;
- proximity to an "anchor" store; and
- proximity to tourist attractions.

Concerns common to all of the factory outlet areas include:

- lack of public restroom facilities;
- traffic flow within the area;

SUMMARY OF FACTORY OUTLET OPERATIONS

The following is a summary of the responses received in the survey of factory outlet operations. Based on the sample of 54, 33 outlets participated, constituting a 61.1 percent participation rate.

1. Of the factory outlets surveyed, 17, or 52 percent, were manufacturer-owned, while 15, or 45 percent, were operator-owned. One was corporation-owned. Three of the 33 outlets surveyed did not consider themselves to be factory outlets or discount operations, but rather stores offering lower prices than retail outlets. Only one outlet contacted, Buyer Factory Store in Orono, was a factory outlet according to the traditional definition, located within the factory and retailing their products at discounted prices.

Thirty-six percent of outlets surveyed carry both premium quality goods and irregulars/close-outs. Owner-operated outlets retailing premium quality goods comprised 24 percent of the sample, while manufacturer-owned outlets retailing both premium quality goods and irregulars/close-outs represented 21 percent. While there was a relatively even distribution of manufacturer-owned outlets dealing with irregulars/close-outs(4), premium quality goods(6), or both(7), there were no operator-owned outlets retailing solely irregulars/close-outs, and five retailing both premium goods and irregulars/close-outs.

Thus, from the survey results, the term "factory outlet" is very broadly perceived by industry participants. A factory outlet can either be a manufacturer-owned, corporation-owned, or owner-operated outlet, retailing the goods of one or more manufacturers, carrying either or both premium quality goods and/or irregulars and close-outs, at discounted prices.

2. The majority of outlet stores (76 percent) surveyed are part of a mall/complex. In Kittery, Maine and North Conway, New Hampshire, two of the three locations surveyed, outlets are primarily located in malls, with few stand-alone structures. Freeport, Maine has more stand-alone structures, but has the benefit of most stores being within walking distance of one another.

Specific comments concerning malls versus stand-alone structures include:

- ° people do not like cold;
- ° better to establish business in a mall setting;
- ° better year round business (Cambridge Dry Goods, in an outdoor complex, Freeport);
- ° better to locate in a mall; versus stand-alone; and since people would rather shop inside in winter (Linens 'n Things, Kittery).

Stand-alone structures tend to have another outlet next door, although one outlet operator was 1/2 mile from the nearest outlet operation. Outlets located away from the main outlet areas are small owner-operated outlets, not dealing with brand name labels.

Over 57 percent of outlets were in single level structures. One operator of a multiple level structure (Kitchen Collections) recommended that operators consider not having a split level store, as many people have expressed dissatisfaction with climbing stairs. Another operator (Curtains Plus) identified a need to have wheelchair access ramps, and allow room in the aisles for wheelchair shoppers.

There appears to be no consistency, based on results from the telephone survey, as to the size (square footage) of operations, even across product lines. Outlets contacted ranged from 1000 ft² to 10,000 ft². Outlets carrying apparel for both sexes tend to be larger than other apparel stores.

Parking facilities are a critical factor in all outlet centers, although in Freeport, there are mostly municipal parking facilities versus store or mall-specific parking facilities.

Seasonal employment is high, with many jobs being created in tourist seasons (summer, Christmas). Employment, in person-months, is dependent on the size and scope of the operation, ranging from 24 person-months employment to 480 person-months employment in the sample. Apparel stores tend to generate more employment than do other product lines, such as leather goods and knitwears. In North Conway, employment is high throughout the winter months due to the proximity to popular skiing facilities.

All outlets contacted operate year round, although operating hours are subject to change during periods of lower business activity. Outlet operators noted that business is strong enough during the tourist season to warrant full year operation.

3. The number of manufacturers products retailed at outlets is dependent on the product line(s) the outlet carries. Apparel stores generally carry one label (8 of 11, or 73 percent), while leather goods and linen stores can carry upwards to 200 different labels. Most shops carrying a large name brand, such as Polo, have exclusive rights to the product name in the outlet area.
4. The sample was determined based on product lines that were similar to products manufactured in New Brunswick. There are many women's/men's/children's outlets in the three outlet centers, as well as a wide variety of other types of outlets, such as craft and woodworking, footwear and toy stores. Of the outlets surveyed, 27 percent carried women's apparel, 18 percent carried men's apparel, and 12 percent carried children's apparel or kitchenware and houseware.
5. Location was considered to be critical to the success of factory outlet operations by 97 percent (32 of 33) of the respondents. Twenty of the 33 respondents, or 61 percent, identified proximity to significant traffic volumes as the key locational factor, while 9 respondents (27 percent) cited proximity to other factory outlets as the key factor. Only two other locational factors were cited as being the most important, those being proximity to other tourist attractions and proximity to an "anchor" store, such as L.L. Bean. Proximity to urban areas was not considered to be all that important, while real estate costs are more of a

deterrent than an attraction. Other locational factors cited include visibility of the outlet store, having a big name outlet in the outlet area, nearby parking facilities, and ease of access on and off the turnpike.

Specific comments include:

- have to be near "anchor" store, and be visible. People come to visit L.L. Bean, are tunnel-visioned, must get them to see you (Toys Unlimited).
- best to be in the middle of the outlets, more traffic flow (Kitchen Collections, Curtains Plus)
- outlet area is a tourist attraction in itself (Fanny Farmer Factory Outlet)
- "anchor" store is a key to business (Gitano, Dansk)
- location relative to "anchor" (L.L. Bean) is "raison d'être" (Casey's Wood Products)
- "name" stores impact on your business, are the volume generators (Laura Ashley)
- no traffic volume, no business; traffic is the operating key (Icelandic Icewear Knits Outlet)
- location is the key to operating; our North Conway outlet does super business in winter (near ski hill), while in Kittery, we have three times the sales in summer. Year round tourist location best (Le Sportsac).
- visibility is a key; location in Laconia is closing - obstructed by mall/motel (Timberland).
- need the traffic volume mostly, have outlets in other non-factory outlet areas that are very successful (Van Heusen)

- people go to tourist attractions to spend money, therefore a prime area to establish business (Van Heusen)
 - operating out of the factory allows us to get to know our clientele and their concerns; an actual feedback process without undertaking a survey (Buyer Factory Store)
6. Most operators were not all that familiar with infrastructure concerns, since all but one were renters. Fourteen of the 33 operators identified zoning as impacting on their businesses. This is mainly due to sign ordinances in both Kittery and North Conway. The lack of standard hours of operation were a concern to three outlet operators, while parking and traffic management was an expressed concern in the Freeport area. None of the participants feel victimized by the bylaws, since all outlets must adhere to them.

Specific comments include:

- all shops should open/close at the same time, lack of standard hours confuses shoppers and can deter business (Fanny Farmer Outlet Store)
 - must plan for growth in factory outlet area, zoning will get strict (Laura Ashley)
 - establishing authorities should plan ahead when setting up outlet area, there will be a boom, zoning will become stricter (Accessory Factory)
7. Only fourteen of the 33 outlets surveyed, or 42 percent, undertook their own sales promotions, while the remainder did not. Word of mouth was considered the most important promotional tool by 22 of the 33 respondents (67 percent), while 30 of the respondents, or 91 percent, considered it one of the top three promotional tools for their business. National advertising, brochures, and local newspapers were the next three most important means of advertising. Other

means of promoting businesses include magazine advertising, radio advertising, mail order catalogues, mailing lists, and the location itself. Certain outlets had unique methods of promoting their business: bridal fairs (Reading China and Glass), use of store flyers (Toy Liquidators), discount coupon program (Gitano), and a 500 Club, where purchasers of over \$500 in merchandise are eligible for a monthly draw for a \$100 gift certificate (The Leather Loft Factory Outlet). Television advertising was not seen as a viable means to promote business due to the cost, while sign ordinances restrict the use of signage to promote business.

Specific comments include:

- do not want to compete with ongoing retail operations, therefore we do not advertise (Polo, Ralph Lauren Factory Store, Toys Unlimited)
- no need to advertise, traffic volume is all you need (Icelandic Icewear Knits Outlet)
- outlet area advertises for you, no need to undertake further promotion (Cambridge Dry Goods)

8. Price was identified as the main factor attracting customers to a factory outlet by 29 of 32 respondents (91 percent). The other three respondents saw it as the second most important factor. In rank order, the other factors that attract customers to a factory outlet are selection, service and atmosphere. Other factors that attract customers include: "brand name" items in the area, location itself, the quality of the line(s) carried, and the attractiveness and appearance of the outlet.

Specific comments include:

- looking good is as important as being good (Hathaway Factory Outlet)
- people are looking to find something they cannot find at home (Accessory Factory)

° keep prices low, don't deceive the people (Chuck Roast)

9. Shoplifting is the main operational concern of respondents, with 42 percent identifying it as a problem. Control of shoplifting is difficult in outlet areas due to the large crowds experienced in peak seasons, lack of staff to control shoplifting, and the presence of professional shoplifters in outlet areas.

Parking was considered an operating concern by 12 participants, or 36 percent of the sample, mostly in the Freeport area, where little storefront parking exists. Concerns specific to Freeport include lack of staff parking, lack of parking specific to outlet operations, and the congestion and lack of parking on weekends.

Adequate staffing is difficult to obtain in the three outlet centers, especially in peak seasons, as there is competition for limited human resources. Eleven participants, or 33 percent of the sample, cited this as a limitation or a concern. Smaller operators were more concerned with staffing, since they cannot pay wages competitive to some of the larger outlet operations. Employment competition also comes from the restaurant industry.

Only three outlets identified obtaining adequate goods as an operational concern. Polo and Ralph Lauren Factory Outlet have a problem obtaining adequate goods at times since retail operations have first crack at the goods, thus the quality of goods received is not always what is desired. Obtaining adequate sizes of clothing was cited as a concern by the other two.

Few stores accept foreign exchange (i.e. Canadian dollars). As banks in the outlet areas are open Saturdays, it is not an operational concern or limitation. One outlet, Specials, accepts Canadian money and keeps the same exchange rate for the full week. Problems of depositing of funds and fluctuating exchange rates were identified as deterrents to accepting foreign currencies.

Returned goods were not identified as a concern. Many stores have an "all sales final" policy, while others have lenient policies. With much of the traffic being tourists, there is less chance of goods being returned.

Other operational concerns cited were: lack of a public transportation system, sign ordinances, traffic congestion, and lack of public restroom facilities in the outlet areas.

10. All 33 outlet operators surveyed had adequate support services near their businesses. Twenty-nine, or 88 percent of participants, felt they were very important to operations, two were neutral, and two felt that they were not important to business. Since all three outlet centers are on heavily travelled roads, day trippers were seen as offering sufficient business by those four outlets not considering support services important to business. Others noted the increased traffic volume due to the support services, the proximity (walking distance) from outlets, and the willingness of motels/hotels to promote their businesses as key factors in operating.
11. Twenty-three participants identified "name brands", in general, as being the most successful outlet operations. Of those identifying specific stores, eight identified L.L. Bean, six, Polo, and three, J. Crew. All of the other outlets identified as being the most successful were name brands. Many participants felt that an outlet operation cannot survive without the presence of anchor stores and/or name brand stores.

Many reasons were identified as to why specific outlets have either failed or relocated. Not only is it the smaller, locally owned outlets that close out, but many large name brand outlets do as well. Guess Jeans (Freeport), Jones of New York (Freeport), and Timberland (Laconia, NH/Bangor, Me.) are some of the brand name outlets that have either failed or relocated. Reasons for failure or relocation include: poor promotion, one dimensional product line, parent company going bankrupt, poor location (visibility, relative to traffic flow), cost of goods (versus perceived cost), and failure to provide enough time to become established as a viable operation.

12. No outlet operator could provide a realistic profile of their clientele. While several national surveys have been conducted by parent companies, results are very general in nature.

Each product line has a target: Hathaway targets the middle-aged businessman, Laura Ashley targets upscale females, mostly professional, and Aileen targets an older, more affluent female market. Yet, these market segments are not the only ones shopping in these outlets. The majority of outlet operators note that their shoppers are a good mix, with more family-oriented shopping in the summer months, while the winter months involve more singles, couples without children and grandparents.

Average age of adult shopper varies according to the product line(s) carried. The only conclusion that can be drawn is that all age groups shop in the outlet areas, not just one specific age group.

Average per person sales vary according to product line as well. Very few stores identified the average client as spending over \$200. Apparel outlets felt that over 40% of sales were between \$50 and \$200, while name brand stores such as Laura Ashley and Cambridge Dry Goods estimated that 10-20% of customers would generate more than \$200 in sales. Overall, the majority of customers shopping at factory outlet stores will spend less than \$200 in a particular store.

The summer months are characterized by tourists from all over the world visiting the three outlet centers. A large percentage of the traffic would be from over 300 miles away, coming from Quebec, New Brunswick and Nova Scotia in Canada, New York and surrounding states (U.S.A.) and Europe. In winter, much of the business volume comes from neighbouring states (Massachusetts, Vermont, Rhode Island), and bus tours passing through the area.

Overall, it is very difficult to classify the clientele visiting outlet areas. Visitation is not restricted to specific age groups, or specific income levels, although many shops are upscale in the outlet areas. Seasonality is a big issue

for operators, who depend on the peak months to carry them over the lean months. Freeport and Kittery have a weak season from January to May, while North Conway experiences a business fall-off in "mud" season (April-mid June) and "foliage" season (late September-mid October). The clientele base varies from season to season, with the base within a 200 mile radius taking on increasing importance in the lean months.

General:

Many concerns not relative to the specific questions were raised. A major concern was the lack of public restrooms in all three outlet centers. As well, lack of parking in Freeport was a concern, partially created by rapid growth in the area; all three outlet centers experienced rapid growth in the 1980s.

Other specific concerns include:

- many people are travellers and do not have room to take certain items back home with them; businesses should consider offering a shipping and/or layaway program to customers (Toy Liquidators)
- cannot forget the necessities for people that live in the area; Freeport does not even have a grocery store anymore (The Whole Nine Yards)
- locals despise factory outlets in the area; is a misnomer, prices are not any cheaper; locals stay away from area from May until mid-October, avoid on weekends (The Whole Nine Yards)
- outlet center changes whole way of life; small community once closely knit becomes depersonalized, no longer know all your neighbours; locals despise it; lifestyle must adjust and environment changes, ruins the culture of a community. Want to build bypass off Route 16, would result in some locals losing their houses (Curtains Plus)

- solid management is important to success of an outlet (Dansk Factory Outlet)

PARTICIPATING FACTORY OUTLETS

Hathaway Factory Outlet
Michele, manager
Route #1
KITTERY, ME.

The Children's Outlet
Donna McDermaid, manager
Route #1
KITTERY, ME.

Polo, Ralph Lauren Factory Store
Dave Melhorn, supervisor
76 Main St.
FREEPORT, ME.

Gitano
Laurie, asst. manager
NORTH CONWAY, NH

Cambridge Dry Goods
Julie Hulse, district manager
42 Main St.
FREEPORT, ME.

Chuck Roast Factory Outlet
Susie Lemire, manager
NORTH CONWAY, NH

Curtains Plus
Jean Blais, manager
Route 16
CONWAY, NH

A String of Beads
Anne Purdue, manager
Route 1
KITTERY, ME.

The Leather Loft Factory Outlet
Diane, manager
Route #1
KITTERY, ME.

Toy Liquidators
Doug Comolli, district manager
Route #1
KITTERY, ME.

Van Heusen
David Smith, manager
Route #1
KITTERY, ME.

Aileen
Phyllis Kimble, manager
Route #1
KITTERY, ME.

The Patagonia Outlet
Peter Ryan, floor manager
9 Bow St.
FREEPORT, ME.

Specials
Sonya Hanson, manager
NORTH CONWAY, NH

Laura Ashley
Karen Fresne, manager
60 Main St.
FREEPORT, ME.

Buyer Factory Store
Jay Shields, manager
ORONO, ME.

Timberland Factory Outlet
Linda Davis, supervisor
42 Main St.
FREEPORT, ME.

Liberty Leather
Anne, manager
Route 16
NORTH CONWAY, NH

Accessory Factory
Rebecca Burle, manager
2 Depot St.
FREEPORT, ME.

Toys Unlimited
Niki, manager
136 Main St.
FREEPORT, ME.

Reading China and Glass
Mary, manager
Route #1
KITTERY, ME.

Dansk Factory Outlet
Susie Sickels, asst. manager
92 Main St.
FREEPORT, ME.

Fanny Farmer Outlet Store
Sarah Mortensen, manager
123 Main St.
FREEPORT, ME.

The Whole Nine Yards
owner (would not give name)
22 Main St.
FREEPORT, ME.

Icelandic Iceware Knits Outlet
Normand Wilson, owner
NORTH CONWAY, NH

Linens 'n Things
Barry Dinkelaker, manager
Route #1
KITTERY, ME.

Ellen Tracy
Carol, manager
NORTH CONWAY, NH

Kitchen Collections
Conrad, asst. manager
Route #1
KITTERY, ME.

Bowl and Board
Judy Conway, manager
NORTH CONWAY, NH

Casey's Wood Products
Eric Johnson, owner
15 1/2 School St.
FREEPORT, ME.

Annie's Book Shop
Margo Miller, manager
NORTH CONWAY, NH

Le Sportsac
Gina, asst. manager
Route #1
KITTERY, ME.

White Mountain Woolens
Robert Meredith, owner
CONWAY, NH

APPENDIX "C"
AGENCY INTERVIEWS

AGENCY INTERVIEWS

Representatives of the following agencies were interviewed to assess their agencies' interest and involvement in the factory outlet concept:

- Department of Commerce and Technology
- Department of Municipal Affairs
- Department of Tourism, Recreation and Heritage
- Department of Fisheries and Agriculture
- Department of Agriculture
- Regional Development Corporation
- Atlantic Canada Opportunities Agency
- City of Moncton
- Fredericton Chamber of Commerce
- Charlotte County Business Development Centre
- Better Business Bureau of Maine

Agency representatives were interviewed using a common format to assure consistency. A copy of the questionnaire is attached.

Interview Results:

- Provincial government department representatives interviewed subscribed to the traditional definition of "factory outlet", that being a factory owned store selling the products (either first quality or seconds and irregulars) of that manufacturer.
- Other agencies interviewed had a broader view of the concept in that they had more intimate knowledge and experience.
- Factory outlets in New Brunswick of which interviewees were aware included:

Hart Shoes (Fredericton)

Benetton (Moncton)

Ganongs (St. Stephen)

J M L Shirts (Edmundston)
Madawaska Weavers (St. Leonard)
Connor's Brothers (Blacks Harbour)
Wheeler Accessories (Fredericton)
McCains (Florenceville)
Moosehead Brewery (Saint John)

- There was minimal agency involvement with Factory outlets. The Department of Commerce and Technology has worked with several identified outlets but only under existing programs for manufacturers. The Charlotte County Business Development Centre has, in the past, investigated the potential for factory outlets for St. Stephen.
- Tourism, Recreation and Heritage is working with the City of Moncton in evaluation of a factory outlet project. The project involved is in relation to the Magnetic Hill/Magic Mountain development and the Departments interests are only pursuant to the tourism implications of the project and the potential for factory outlets to support existing developments and stimulate new visitations.
- The representative of the Charlotte County Business Development Centre indicated that his group had reached the following conclusions:
 - 1) Factory outlet malls require an "anchor" to succeed; and
 - 2) There is difficulty in finding Maritime manufacturers with large enough volume of production to allow them to participate.
- None of the agencies interviewed were aware of any published studies in relation to factory outlets. The Department of Commerce and Technology provided the publication entitled "The Scope of the Shopping Centre Industry in Canada, 1989".
- Of the agencies interviewed the following were considering the factory outlet concept as a means of furthering their goals:

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- Tourism, Recreation and Heritage is very interested in the concept as a means of attracting tourists. Tourism industry surveys have indicated that shopping is a preferred activity for tourists.
- Agriculture is supporting the concept in the form of Farmer's markets and outlets for products such as maple sugar.
- o Half (4) of the agencies interviewed felt that the factory outlet concept would be consistent with their goals.
- o The following New Brunswick products were indicated as being worthy of consideration for outlet-type sales:
 - o Primary agricultural products (farmer's markets)
 - o Processed foods
 - o Furniture reproductions
 - o Craft
 - o Clothing
 - o Footwear
 - o Fisheries products
 - o Souvenirs/crafts
 - o Traditional heritage products
 - o Fish specialty products
 - o Blown glass products

Note: This product list represents the opinions of the interviewees and is not a conclusive list.

- o Funding programs, potentially available to entrepreneurs considering establishing factory outlets include:
 - Charlotte County Business Development Centre. Entrepreneurs can obtain up to \$75,000 at prime rate plus one percent in a loan with repayment tailored to the needs of the entrepreneur.

- Municipal Affairs is currently formulating the implementation criteria for a downtown development program. The program could potentially have funding for building conversions and street scaping in the context of downtown development.
- Regional Development Corporation. Funding could potentially be available from RDC only if the proponents qualified for federal job creation funding resulting in a significant amount of employment.
- Tourism, Recreation and Heritage does not currently have funds available for outlet development but would be prepared to consider funding requests in the future in relation to outlet infrastructure development which would stimulate tourist visitation.
- Agriculture. The recently signed federal/provincial sub-agreement on agriculture offers some possibilities for funding of outlets in relation to agricultural products. Implementation guidelines are currently being formulated.

APPENDIX "D"
FIELD TRIP REPORT

Field Trip Report - Factory Outlet Study

From October 23 to October 27, 1989, study team members visited factory outlet locations in Freeport and Kittery, Maine and North Conway, New Hampshire. In addition, information pursuant to the study was acquired in Bangor, Skowhegan, Augusta and Portland in Maine and Portsmouth, New Hampshire.

The purpose of the field investigation was:

1. To interview key industry participants, municipal officials, non-factory outlet retailers, Chambers of Commerce and people knowledge about the factory outlet industry;
2. To obtain a general overview of the factory outlet industry and a hands-on feel for problems and issues;
3. To record on film (video, colour slides, B/W and colour prints) examples of factory outlets in the locations visited; and
4. To collect industry publications to be included with the final report.

The following schedule indicates activities which took place and is followed by detailed accounts of interviews.

Monday, October 23

- ° Travel Fredericton to Bangor
 - Visited Buyer Factory Outlet in Orono
 - Met with Dr. Rand Erb, Executive Director, Canadian-American Centre, U. of Maine
 - Met with Roy Daigle - General Manager - Bangor Mall
 - Visited University of Maine, Orono to investigate several data sources
 - Visited Husson College to obtain economic data

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- ° Travel Bangor to Skowhegan
 - Visited New Balance Factory Outlet
- ° Travel Skowhegan to Augusta
 - Visited Department of Economic and Community Development, Maine State Planning Office (Economic Analysis Division) and Maine Economic Data Centre
- ° Travel Augusta to Freeport
 - Visited selected stores, took pictures

Tuesday, October 24

- Visited Tourism Information Centre - gathered publications
- Met with Stuart McGeorge, Director of L.L. Bean Retail Store
- Met with Edgar Leighton, Freeport Merchant (non-factory outlet)
- Met with Dale Olmstead, Town Manager, Freeport
- Extensive video and picture work
- Informal interviews with merchants

Wednesday, October 25

- ° Travelled Freeport to Portland
 - Met with Grace Russell, Vice President of Operations for Ram Management - a major outlet mall developer
- ° Travelled Portland to Kittery
 - Met with David Moulton, President of the Kittery Chamber of Commerce and Bruce Clark (also with Chamber), both non-factory outlet businessmen
 - Visited outlets, took pictures

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Thursday, October 26

- Met with Philip McCarthy, Town Manager, Kittery
- Visited Chamber of Commerce office in Portsmouth, N.H.
- Filming and videos
- Discussions with merchants
- ° Travelled Portsmouth to North Conway
 - Met with Maureen Cason, Director of Chamber Services, for the Mt. Washington Valley Chamber of Commerce and Visitors Bureau
 - Visited outlets, took pictures

Friday, October 27

- Met with Curtis Lunt, Town Manager, Town of Conway
- Video and pictures
- Accumulated printed material
- Informal discussions with outlet operators
- ° Travelled from North Conway, N.H. to Fredericton

INTERVIEWS

**A. Dr. Rand Erb, Executive Director, Canadian-American Centre,
University of Maine**

The study team visited Dr. Erb in pursuit of any economic impact or retail sales studies that might be available. Mr. Erb did not personally know of any studies but referred us to Dr. John Sullivan of Husson College in Bangor and phoned ahead to introduce the team. In addition, Mr. Erb suggested that the study team meet with Roy Daigle, Manager of the Bangor Mall whom he characterized as very knowledgeable in retail trade in the region and in the concept of factory outlets/off price stores.

It should be noted that the Canadian-American Centre was engaged by the Governor of Maine to study opportunities related to free trade. The resultant publication, The Maine Canada Connection - New Opportunities for Maine Business, published in 1989, is appended.

B. Roy Daigle, General Manager, Bangor Mall

- The concept of factory outlets/off price stores has peaked. Mr. Daigle felt that the market for such facilities was fast becoming saturated and that regular retailers were rising to the challenge with their own marketing strategies.
- Approximately 30% of business, annually, at the Bangor Mall is from Canadians. This percentage is considerably higher on weekends (especially Canadian holiday long weekends) and during July and August.
- Mr. Daigle indicated that the following attributes draw customers:
 - Value (good value for price paid)
 - Quality (quality merchandise)
 - Selection (good range of products, sizes, prices, etc.)
 - Price (low prices)
 - Tenant Mix (good selection of stores in a location)
 - Service (efficient, courteous, knowledgeable staff)

He emphasized that value was by far the most important factor.

- In any mall or concentration of stores, the concept of an "anchor" is critical, be it a major department store, L.L. Bean in Freeport or the Kittery Trading Post in Kittery or the year round tourism attractions and facilities of North Conway.
- The mall concept for outlets offers the best presentation.

D-5

- There was a factory outlet/off price mall planned for the Ellsworth area but the project is on hold. The original developers from Georgia are looking for local partners.
- Mixing outlet/off price stores with regular retailers in a mall situation is not viable. The reaction of regular retailers would be very negative.
- Off price outlets in existing malls do not generate the levels of profit needed (rent is percentage of gross sales) particularly when they may be competing directly with existing retailers.

C. Stuart McGeorge, Director, Retail Store, L.L. Bean, Freeport, Maine

- Mr. McGeorge is on the Boards of Directors of the Freeport Merchant's Association and the Greater Portland Convention and Visitors Bureau as well as participating in the Mid-coast Business Council.
- L.L. Bean is 75 years old but prior to 1981 stood alone with no outlets/off price centres in the community.
- Mr. McGeorge felt that the principal reasons for factory outlets locating in Freeport were the traffic on nearby Route 95 and the existence of L.L. Bean (anchor).
- He felt that the outlet phenomena had not peaked.
- Property values in Freeport have increased dramatically since 1981 and this has driven traditional merchants and residents out of the area. He cited several businesses and service stations which have disappeared off Main Street. The current costs for land are in the order of \$22 per square feet.
- Property values closest to L.L. Bean have been affected the most.

D-6

- Mr. McGeorge suggested that the team contact Edgar Leighton, owner of the local 5¢ - 10¢ store and a hardware outlet, to obtain the views of a non-outlet merchant. Mr. Leighton is a native of Freeport and was the original owner of the building across the street from Bean's in which the first outlet, Dansk, located in 1981 following a fire which destroyed the existing business.
- The factory outlet phenomena has been positive for Freeport although it has been very painful for natives. The outlets have sustained growth in Freeport, increasing the tax base and reducing unemployment.
- Many older residents have moved out of town because of the increased people pressures and the age distribution in the community has changed.
- Unemployment in Freeport is approximately 0%.
- A major issue in Freeport is taxes. As the value of the tax base increases, the State reduces its contribution towards education on the basis that the Town can afford to pay more. This has resulted in tax increases to pay for education; tax increases which are being attributed by local residents to the outlet's affect on the tax base.
- Customer base at L.L. Bean is educated, upper income.
- In the early stages of development, there were law enforcement problems with local residents but this has diminished considerably with improved economic conditions.
- There is an excellent working relationship between local merchants (outlet and traditional retailers) and the Town. Communication has been critical to this success.

D-7

- The community has stringent building codes and a full-time Codes Enforcement Officer. In the early stages of development of outlets in the community, codes were sometimes overridden in the interests of getting a store to locate. This no longer happens.
- 5-6 million cars pass through Freeport annually.
- Some outlets have failed in Freeport. Most have failed primarily due to poor management and lack of commitment. Occasionally failures can be attributable to extreme competition. (i.e. 3-4 Christmas specialty shops in one area).
- Freeport has experienced problems with the absentee landlord character of the outlet business. Many outlets are from chains headquartered out-of-state. They install their own managers from outside the area. These individuals have no local commitment, do not know the area and weaken the local merchant's association because of lack of participation.
- There is no financial support available in Maine to entrepreneurs building outlets.
- Freeport has a distinct advantage over Kittery and North Conway in that you can park your vehicle and visit more than 100 outlets.
- L.L. Bean used two consultant's specializing in location of retail facilities in deciding where to locate their outlet in North Conway. The primary considerations were traffic, proximity to other businesses and availability of support services.
- The L.L. Bean store represents every item in their catalogues.

D. Edgar Leighton, owner Leighton's 5¢ to 10¢ and Local Hardware Stores

- Mr. Leighton indicated that prior to 1981, Freeport was a modest coastal community not unlike many other communities in coastal Maine other than the fact that L.L. Bean was located there.
- Educational support from the State has diminished as the local economy has improved resulting in higher taxes. This is a major local issue.
- Land values have sky-rocketed since 1981.
- Effects on Mr. Leighton's businesses:
 - Hardware store - increased traffic due to outlets, particularly during summer, have harmed business.
 - 5¢ to 10¢ store - outlets have generated traffic which has increased sales of small goods.
- Mr. Leighton indicated that the Freeport Pharmacy was originally located on Main Street but moved one block back to cash in on the value of their property.
- The factory outlet phenomena started in 1975-76 when the Town and local merchants, faced with empty stores and a decaying business community, looked for development options.
- 10% of landowners pay 30% of taxes.
- There has been an in-migration of outsiders. Local residents cannot afford to stay. The out-migration of locals has not been lessened with the arrival of the outlets.
- Freeporters are slightly negative about the overall effects of the factory outlet industry.

D-9

- Parking is a major problem. In Freeport, the municipality controls all leased parking.
- Traffic management is critical to success. Freeport has been quite successful in dealing with this issue. Pedestrian movement causes serious problems.

E. Dale Olmstead, Town Manager, Freeport

- occupied position of Town Manager since 1982 when first impact of factory outlets was felt.
- local citizenry, i.e. older Freeporters born in area, received success of outlets with open arms. Answer to local unemployment and general prosperity since demise of mill operations in 1970's. Recent arrivals to Freeport since late 1970's who were trying to escape the urban sprawl of New England were collectively opposed to the changing lifestyle of Freeport.
- property assessments have probably tripled between 1984 and 1988. Older residents have sought less expensive properties beyond the Town (10-20 mile radius).
- traffic is considered a paramount problem. Until 1986 few ordinances governed parking requirements for the establishment of new businesses. Since then the business community and Town officials reached agreements on cost-sharing off-street parking to relieve congested Main Street area.
- police force has doubled since 1984 to meet needs for traffic control. While car thefts are evident they do not apparently constitute a major problem. Authorities feel traffic flow has peaked and parking is adequate to meet needs.
- to retain original character of town, a Design Review Board was formed in 1984 to receive applications principally from new and existing businesses. Exterior facades and architectural appropriateness are of particular concern.

- current land zoning has stressed regulation of remaining land use located to the south of Freeport which is not commercialized. Zoned only for future low profile accommodations and restaurant services. Town manager cites these as important factors to ease the burden of traffic and improve image.
- Town Manager felt that while outlet system expansion has taken a deep breath in last year, building permits for 1990 would be up over 1989, particularly with addition of a major food chain mall to service area.
- in terms of socio-economic profile of visitors, Mr. Olmstead identified "the best and the brightest" as the dominant shopper in Freeport - upper income, sophisticated buyer.

A copy of the 1988 Annual Report for the Town of Freeport is appended.

**F. Grace Russell, Vice President of Operations, Ram Management
(Outlet Mall Developer)**

- o Major developer in downtown Portland. The firm has restored several buildings and converted them to office and retail use.
- o Outlet malls are located on the basis of demographics plus the "gut feelings" of the firm's partners. Consideration is given to provision of ample parking, access and egress, aesthetics and fit into the neighborhood.
- o The concept of each individual mall must be customized to suit area in which it is located. There are no standard designs or concepts.
- o Kittery is a destination of choice for northeast Massachusetts. Twenty percent of clientele from Maine, 80 percent from outside Maine.
- o Kittery is not sophisticated in the provision of support services.

D-11

- Outlets/off price centres have not peaked. Regular retail operations have peaked.
- Consumers at factory outlets are in the \$50,000 + salary bracket. This has evolved over the past five years.
- Although service is important, expectations of service at outlets are less than at regular retail outlets.
- Freeport suffered a slump several years ago; consumers were annoyed at high prices.
- The market place is growing increasingly sophisticated. Merchants will have to meet the challenge to succeed.
- Tenant mix in malls is critical to success.

G. David Moulton, **President of the Kittery Chamber of Commerce and**
 Owner/Operator of D and S Mobil (gas station);
Bruce Clark, **Kittery Chamber of Commerce and Owner of Kittery**
 Rent - All

- Development of outlet/off price malls was essentially unplanned by the Town. Land was already commercially zoned and outside the main business area. Planning is just now catching up with development.
- Traffic and pedestrian management have been major concerns.
- There has been no impact on local taxes because no assistance was given to developers. In fact the developers themselves financed \$750,000 worth of sewer work pursuant to development. All users are assessed a user fee by the Town and the developers are reimbursed.

D-12

- Parking requirements are set in town ordinances. There has been no deviation from these standards.
- Kittery has the physical potential for further expansion. There is land available.
- A large outlet mall in Portsmouth, N.H. failed in the past 5 years. It could not draw stores as it was located between two other traditional malls. The failed mall is now an industrial mall.
- Labour shortages are chronic in the area.
- Growth has been concentrated on U.S. 1 with little impact on the community itself.
- More Kittery residents work outside the community than in.
- Business/community cooperation is just beginning in Kittery as opposed to Freeport where there is an excellent working relationship.
- Common forms of crime in area are car break-ins and shoplifting.
- Outlet developments have not had a great effect on community demographics.
- Accelerating land values (app. \$25,000 per acre) are driving people away. The acceleration is not entirely due to factory outlets but reflects current trends in seaside real estate.
- Kittery is a community with a diverse economic base. Were the malls to fail, the results for Kittery would not be as catastrophic as for, say, Freeport.

D-13

- The emergence of factory outlets resulted in Kittery hiring a full time planner.
- Formerly the season in Kittery was from 4th of July until Labour Day. Now the tourist season is approximately 10 months per year.

H. Philip McCarthy, Town Manager, Kittery

- Local residents in Kittery do not shop at local outlets. They shop in neighboring New Hampshire where sales tax is 0%.
- There is some local resentment of the outlet/off price developments.
- Mr. McCarthy indicated that without the outlet malls, taxes would actually be higher. The tax base in the community was recently re-assessed. When the assessment was \$217 million the malls constituted 22% of the tax base. Subsequent to re-evaluation to \$612 million, the malls still constitute 22% of the tax base.
- Assessed value of waterfront properties has increased six-fold. Malls are not a major factor in this rise.
- There have been law enforcement problems related to mall development i.e., thefts, vehicle crimes, shoplifting. Some of this has been the work of organized groups from Boston and New York.
- There is presently a six month moratorium on development in Kittery to allow planning activities to catch up.
- The market place will dictate expansion of Kittery outlet shopping. There is currently 600,000 sq.ft. of development in the planning stage.
- Traffic safety is a major concern.

D-14

- The Town is proposing a zoning change from commercial to mixed use on U.S. 1.
- There is mixed opinion in the community on the need for new services (accommodation, food) on U.S. 1.
- Building permits in Kittery have averaged less than \$10 million each of the past two years which is quite modest in face of a tax base in excess of \$600 million.
- Kittery has lowest unemployment rate in Maine.
- Population of Kittery has remained stable.

A copy of the 1988 Annual Report for the Town of Kittery is appended.

**I. Maureen Cason, Director of Chamber Services, Mount Washington
Valley, Chamber of Commerce and Visitors Bureau**

- Traffic circulation in North Conway presents a major problem due to narrow roads and high volumes. The community is boxed in with the White Mountains National Forest on one side and the community and the mountains on the other.
- The Outlet Association includes 46 of approximately 100 outlets in Mount Washington Valley.
- There are also approximately 200 regular retailers in the Valley.
- Labour shortages are chronic in the outlets.
- Settlers Green started out as specialty shops rather than outlets but has quickly been taken over by outlets.

- Available land for development in the community is in short supply.

An information package provided by Ms. Cason is appended.

J. Kurt Lunt, Town Manager, Conway N.H.

- Mr. Lunt has been Town Manager of Conway (includes North Conway and East Conway) for seven years.
- No planning has been done in relation to factory outlets and there has been no change in regulations due to the emergence of outlets.
- Tourism is the anchor in North Conway; the volume of tourist traffic has attracted merchants.
- No studies are available on impacts.
- 1989 represented a slow year for outlet activities in North Conway.
- Major growth in outlets in North Conway has occurred in the past 3 years with almost all growth occurring in the last five. Building permits, annually, have doubled during that period.
- Average Annual Daily Traffic (AADT) in North Conway in 1988 was 20,000 vehicles. Traffic congestion has, at times, been severe.
- The Planning Board has a Site Plan Review Process which deals with signing, parking and layout.
- Local opinion on the evolution of the outlets is mixed. There is considerable frustration with traffic congestion. Outsiders involved in the industry have not participated in local community life.
- Zoning in North Conway was only adopted in 1980.

D-16

- Property values in the area have doubled in the past 5 years.
- There have been major problems in traffic enforcement and car break-ins.
- North Conway is a four season resort. This is important to long-term prosperity.

A copy of the 1988 Annual Report for the Town of Conway is appended.

APPENDIX "E"

**APPLICATION OF LOCATIONAL CRITERIA -
SPECIFIC LOCATIONS**

BACKGROUND

In Appendix "E", each of the eleven potential locations in New Brunswick for value retailing outlets are analyzed in relation to the locational criteria described in Section 4.1. The scores assessed to each criteria for each location are subjective, but also based on data for each location. Although in some cases (i.e., tourism data, census data) the material is dated, it is equally applied to all locations and thus, the relative ranking of locations is valid.

For several of the criteria, accurate scoring is impossible unless a specific location for the potential value retailing facility is known. To this end, the scores for visibility and access are very subjective given the dependence of these criteria on location. For visibility, all potential locations are assessed 10 points out of a possible 15 on the presumption that entrepreneurs will attempt to locate value retailing facilities with maximum visibility and that at the locations assessed, there is the potential for maximum visibility. The exceptions are St. Stephen (9/15) and Moncton (12/15), two locations where potential sites have been chosen. In St. Stephen, the old Ganong Factory is being considered as a potential value retailing location. If the downtown is bypassed by a proposed bypass and third border crossing point, visibility would be affected. In addition, the Ganong Factory has a very limited amount of frontage on the street; thus, outlets would be located within this structure such that visibility would be minimal. For the Moncton location, the City of Moncton is already investigating a site at Magnetic Hill. This site would have relatively high visibility adjacent to the TCH and in conjunction with existing attractions in the area.

The point ratings for access are quite subjective, relating primarily to the potential for locations adjacent to highways with limited access, such as the Trans-Canada Highway. Access from limited access highways would only be via intersections, thus limiting options for locating value retail facilities.

The "gut feeling" point ratings are very subjective and are applied much in the same manner as they would be by a developer. They are based on the results of the other nine criteria and intangibles that are not included in those criteria.

BENCHMARK LOCATIONS**Freeport, Me.**

As indicated in Table 4, 15,000 vehicles per day (ADT) is the minimum acceptable **traffic volume** when considering establishment of an outlet, with a stronger preference for 20,000 vehicles per day or more. In Freeport, the ADT is 13,700 vehicles per day with total annual traffic in excess of five million vehicles. Score: 17/20.

The undisputed "**anchor**" in Freeport is the L.L. Bean store. This is acknowledged by informed industry participants and widely accepted by the travelling public. Score: 20/20.

Freeport is approximately 30 kilometres from Portland, the nearest concentration of regular retail shopping facilities, thus the outlet developments in Freeport were at the minimum distance from regular wholesale accounts as determined by Value Retail News for 1988. Freeport thus meets the free trade zone requirements although it did not in 1981 when development of outlets commenced. At that time, the recognized free trade zone was in excess of 46 kilometres. **Free trade zone** is scored at 13 for Freeport on the basis that it is at the edge of the accepted zone and was within the zone when outlet development commenced in the community. Score: 13/15.

Excellent signage on I-95 and the existence of U.S. Route 1 directly through Freeport (Main Street) give excellent **visibility** of the overall development. The fact that the outlets are situated in a "town" environment with outlets distributed on side streets as well as Main Street lessens their individual visibility. Score: 13/15.

In Freeport, there are in excess of one hundred value merchandising outlets. This constitutes a **critical mass** comparable with any of the top locations for outlets in North America. Score: 15/15.

Tourist Traffic in Freeport is in excess of 5,000,000 vehicles annually. Freeport is widely recognized by the travelling public as a tourist destination primarily due to the existence of outlet shopping opportunities but also due to the existence of local tourist

attractions and services. In Table 4: Specific Outlet - Locational Considerations, tourist traffic is prominently indicated as an important consideration. In Table 3: Off Price/Outlet Malls - Market Area Characteristics, volumes of 3-5 million tourists annually are specified. Score: 15/15.

For Freeport, **demographics** include a population within a thirty mile radius of approximately 500,000 and average household income within that radius being \$29,000 per annum (in U.S. \$; \$34,500 in Canadian \$). These will be used as benchmark figures. Score: 10/10.

Interviews with industry participants, operators of L.L. Bean, the Town Manager and non-outlet merchants in Freeport confirm that **development costs**, particularly in relation to land prices, have accelerated in the past five years in Freeport. As actual development and land costs are difficult to acquire, points assessed to this category will be subjective and relate largely to perceived land costs. Score: 5/10.

Freeport is served by convenient, well-signed exits on the interstate (I-95). In addition, U.S. 1 constitutes a major artery which passes through the centre of Freeport. Vehicular movement within Freeport, however, is constrained by the existing town street networks, and parking is scarce in face of the large volumes of traffic. Once vehicles are parked, **access** to most of Freeports' outlets is convenient and easy by foot. Score: 7/10.

Assessment of "**gut feeling**" in relation to the establishment of outlets in Freeport is academic in face of its proven success. Score: 10/10.

Ellsworth, Me.

Ellsworth is located at the intersection of Highways 1 and 1A and Routes 172, 180, 179, 230, 3, and 184. It is located approximately midway between Bangor and Bar Harbour. **Traffic volume** data is less definitive than that for most New Brunswick locations due to the number of highways in the area and less accessible statistics. Traffic is highly seasonal in the area due to the seasonal nature of the tourism industry. For example, the average daily vehicle count for March of 1988 was 6,153

vehicles and for August 17,363 vehicles. The annual traffic volume in the Ellsworth area is estimated at 3.7 million vehicles. Score: 12/20.

Although there are few existing value retail outlets in Ellsworth, these existing as free standing independent outlets (i.e., Dexter Shoes), there are no outlet malls or accumulations of outlets as found in Freeport. L.L. Bean has made the decision to locate an outlet on the southern boundary of the community as part of an overall outlet development (mall). In addition, Ellsworth already has significant shopping/accommodation/food services resources. The community is located approximately 30 kilometres north of Bar Harbour, a major tourist destination and Acadia National Park, a national park with the second highest annual visitation in the United States (4,000,000 + visitors annually). Bangor, a major shopping destination, is located forty kilometres to the north. All of these factors constitute a formidable anchor to draw visitors to the area. Score: 20/20.

The major area shopping facilities in Northeast Maine are located in Bangor, forty kilometres distant, outside the **free trade zone**. Ellsworth, itself, however, has a significant number of retail outlets in three shopping centres which will be well within the industry established free trade zone. The developers (and associated manufacturers) appear willing to proceed. Score 3/15.

Visibility will ultimately depend on the specific site chosen and the orientation of the mall developed. The site tentatively proposed on the south side of Ellsworth towards Bar Harbour at the intersection of Routes 1 and 3 and should offer excellent visibility. Score 12/15.

The proposed outlet mall development in which the L.L. Bean outlet would be located would contribute towards **critical mass** depending on the number and type of stores ultimately locating there. In addition the other shopping and service facilities in the area would contribute to that critical mass further increasing the area's attraction as a shopping destination. Score: 11/15.

Acadia National Park, 30 kilometres distant, experiences the second highest visitation in the United States national parks system with more than 4,000,000 visitors annually.

Bar Harbour, located on the eastern edge of the national park has been a popular tourist destination for more than a century. Bar Harbour is also the U.S. terminus for the Bar Harbour to Yarmouth, N.S. ferry. Although there have been no studies in the area specifically focusing on **tourist traffic**, much of the traffic volume already addressed can be considered tourist traffic. Score: 14/15.

The population of Ellsworth in 1987 was 5,800. The population of the surrounding county, Hancock County was 44,850 which easily doubles during the summer months when seasonal residents return for the summer. Within the 100 mile radius used as an industry standard there are in excess of 250,000 people. The average annual household income in Hancock county varies from \$10,500 (\$12,500 Canadian) for those in retail trade to \$23,500 (\$28,000 Canadian) for those engaged in manufacturing. **Demographics.** Score: 6/10.

Development costs in the Ellsworth area would be relatively high. Established as a regular retail shopping area and long popular as a tourist destination, land and development costs would be higher than in most New Brunswick locations and approaching costs for Freeport. Score: 4/10.

Access will ultimately depend on the specific site chosen, traffic and service roads adjacent to that site and the style and orientation of the value retailing structure involved. A location adjacent to Highways 1 and 1A (neither is controlled access) would offer good access possibilities. Score: 7/10.

Obviously, the "**gut feelings**" of developers are that the site will succeed as a factory outlet location in that they have already announced an outlet project. Score: 10/10.

NEW BRUNSWICK LOCATIONS

St. Stephen, N.B.

For the purposes of this analysis, the St. Stephen location is presumed to be the old Ganong Factory on the St. Stephen waterfront. Traffic entering Canada at the border points must, presently, pass directly in front of this site.

Major traffic volumes in the St. Stephen area are found on Routes 1 and 3. Annual average daily traffic (AADT) counts for 1988 indicate that the volume of traffic on these two routes was 8,260 vehicles per day, or 3.0 million vehicles annually. This figure may be understated, as there are other minor access routes leading to and from St. Stephen. According to Economic Consulting Services, co-authors of the Chocolate Theme Park Economic Feasibility and Concept Development Study, the AADT for the St. Stephen area has been increasing since 1983.

St. Stephen is the location of two border entry points with the United States. The St. Stephen entry point is one of the busiest in Canada accounting for approximately 1.4 million vehicles annually entering Canada. The other crossing, at Milltown, also part of St. Stephen, accounts for approximately 400,000 annual entries into Canada. The two entry points total 1.8 million entries into Canada annually. Although not all vehicles which enter at St. Stephen exit at St. Stephen, the two way traffic at these border entry points, for analysis purposes, can be estimated at 3.6 million vehicles annually. Score: 10/20.

St. Stephen, itself, possesses no rural **anchor** as defined in Section 4.1. The St. Andrews area, however, is a major traditional tourist destination in the province and would constitute a form of anchor for St. Stephen given its proximity (approximately 20 km). Furthermore, should the proposed Chocolate Theme Park be constructed at the location between St. Stephen and St. Andrews, it would constitute an anchor.

St. Stephen is a minor regional shopping destination with a small shopping centre located on the northern outskirts near the intersection of Routes 1 and 3, and stores on Milltown Boulevard upon which the Ganong Factory is located. **Free trade zone** implications for St. Stephen are relatively minor as very few chain stores carrying major brand names are located in the community. There are also shopping facilities in Calais, Maine immediately adjacent to St. Stephen but they have no free trade zone implications because the nature of the shopping facilities is similar to those in St. Stephen and the international border separating the two communities dictates entirely different sources of supply for retailers. Score: 13/15.

Visibility of the Ganong factory location in St. Stephen is excellent. The old factory structure has limited frontage on Milltown Boulevard but its imposing size gives it high visibility. Presently, the primary access and egress (other than minor side streets) for the border entry points passes directly in front of the factory. Should outlets be developed in the facility, they would not be individually visible from the road due to the building layout. Future plans for the area include the construction of a by-pass which would allow vehicles to cross the border and reach Routes 1 and 3 without going through the downtown. This is primarily aimed at reducing commercial traffic in the downtown but would doubtlessly result in the diversion of large numbers of private vehicles as well. This would drastically effect the visibility of the proposed Ganong factory location. Score: 8/15 (without the bypass).

Critical Mass is not a factor in St. Stephen. The community has a minimum number of regular retail outlets, one factory outlet (Ganong's) and no other value retailing outlets. Score: 0/15.

Tourist Traffic constitutes a significant presence in St. Stephen during the period from May to October. According to the last completed Auto-Exit Survey (1983), 241,102 non-resident parties passed through the town. This constituted 613,053 persons, 62 percent of which were Americans and 37 percent Canadians, primarily from Nova Scotia (14 percent) and Ontario (13 percent). The month of July was the busiest month with 34 percent of the non-resident traffic. Sixty percent of visitors identified sightseeing as the primary purpose of visit whereas approximately 3 percent identified shopping as their purpose. This may be reflective of the general lack of shopping facilities in the area. This data is clearly dated and will be updated with the release of the 1989 Auto-Exit survey early in 1990. From the 1986 Canadian Travel Survey, it is estimated that tourist visitation to the Charlotte/Kings/St. John region was 800,000 person trips. It should be noted that this region includes Saint John and Sussex. Score: 7/15.

In 1986, the Town of St. Stephen had a population of 5,035 and a population within a 100 km radius of 235,000. Average household income (1986) is \$25,026 which is 13 percent less than the Provincial average. Only 15 percent of the population over age

15 had some university education and approximately 50 percent had not completed high school. Score: 4/10 for **demographics**.

In relation to **development costs**, land costs in St. Stephen would be significantly less than in Freeport but more than in an unincorporated rural area of the province. Score: 6/10.

Access to outlets located in the old Ganong Factory would be hindered by a general lack of parking facilities to handle high volumes of traffic and a lack of convenient space to expand parking. Access to the site from the traffic flow is excellent in that the road passes directly in front of the factory. Score: 5/10.

In assessing **gut feeling**, the preceding nine locational criteria are considered in addition to the accumulated expertise of the consultant team, much in the same manner a developer would consider the factors. Score: 7/10.

Woodstock, N.B.

The major traffic volume in the Woodstock area is located on the TCH, Route 2, as recorded north of the intersection of Route 95 and Route 2. In 1988, AADT at this point was 7,100 vehicles; annual traffic, based on this, is estimated at 2.6 million vehicles. There are other access roads to the Woodstock area which would increase this figure.

Approximately 500,000 vehicles entered Canada in 1988 from the United States at Woodstock. This would give a two way traffic flow at the border of approximately one million vehicles annually. A border crossing in nearby Centreville had two way traffic of approximately 240,000 vehicles annually. Score: 8/20.

Woodstock does not have a major facility, attraction or service that could be considered an **anchor**. The community has an annual festival, Old Home Week, and is situated in the scenic St. John River valley, but is not a tourism or shopping destination. Score: 7/20.

There are few **free trade zone** implications for Woodstock. The community has regular retail facilities (small shopping centre, free standing stores) and more extensive shopping facilities are located in nearby Houlton, Me. (approximately 12 km). As the facilities in Houlton are in the United States, they do not influence the free trade zone considerations in Canada; sources of supply (wholesalers and manufacturers) are different. Score: 13/20.

Visibility of outlet locations in the Woodstock area would depend on their location in relation to the proposed, limited access, four lane Trans-Canada Highway. Woodstock will be the location of a major interchange and any proposed outlets would have to be accessed via this interchange. Adequate signage and, possibly, visibility from the TCH, would be important. Score: 10/20.

Critical Mass is not a factor in the Woodstock area. Score: 0/15.

In 1983, non-resident **tourist traffic** consisted of 254,240 parties or 655,372 persons. Of this total, 71 percent were of Canadian origin, primarily from Ontario (35 percent), Quebec (16 percent) and Nova Scotia (10 percent). American tourists constituted 26 percent of the traffic. Passing through was the primary purpose of visit (41 percent), reflecting Woodstock's location relative to the United States border. Thirty-eight percent of respondents were interested in sightseeing; a further 13 percent were visiting friends and relatives. From the 1986 Canadian Travel Survey, tourist visitation to the Madawaska/Victoria/Carleton region was estimated at 300,000 person trips. This region includes the Edmundston/Grand Falls area. Score: 7/15. This reflects the pass through nature of visitation to the area.

The 1986 population of Woodstock was 4,550. Within a 100 kilometre radius, the 1986 population base was 205,000. Average household income was \$27,018, 6 percent below the Provincial average. Unemployment was relatively low, at 12.4 percent, compared to the Provincial average of 16.9 percent. Approximately 18 percent of the population over the age of 15 had some university background, while 43 percent did not complete high school. Score: 5/10.

As Woodstock is a major entry point to the United States for commercial truck traffic, connecting Highway 95 with the TCH, the area has experienced growth in small processing facilities and trans-shipment facilities. This is also due to the Canada/U.S. Free Trade Agreement and its implication for future commerce between the two countries. As a result, the **costs of development** in the Woodstock area have risen due to increasing land values. Score: 6/10.

Route 95 intersects the TCH at Woodstock, and leads to the United States border at Houlton, Maine. Although there are no definite plans concerning the highway as of yet, the highway will be twinned (two lanes added) in the near future, and the possibility of future realignment, including Route 95, exists (B. McEwing, Transportation pers. comm.). How this is accomplished will directly affect **access** to any outlets developed in the area. Adequate signage will be critical. Score: 5/10.

Although Woodstock is a major entry point to the province and figures prominently in the trans-shipment of goods to and from the United States, it has little to attract and retain visitors. **Gut feeling** score: 4/10.

Grand Falls/Edmundston, N.B.

The Grand Falls/Edmundston area, rather than the communities individually, was selected for review as this area bordering the TCH represents a relatively continuous strip of development.

Traffic volume on Route 2 between Edmundston and Grand Falls was 9,050 vehicles daily in 1988 or 3.3 million vehicles annually. This figure is understated, while there are many other secondary access roads in the area (as it reflects one area between the two centres (the point with the highest traffic volume). The AADT at St. Jacques, near the Quebec border, was 3,820 vehicles, or 1.4 million vehicles annually.

The Canada/U.S. border is accessed at several points in this area resulting in cross border two-way traffic flows as follows:

Andover	575,000	persons
Clair	1,010,000	persons
Edmundston	2,550,000	persons
Grand Falls	780,000	persons
St. Leonard	1,030,000	persons

Much of this traffic is local resident traffic. Score: 12/20.

The Grand Falls/Edmundston area does not have a major **anchor** similar to Freeport, Kittery and North Conway. It does, however, have natural attractions such as the Grand Falls Gorge, Lac Baker and Les Jardins de la Republique Provincial Parks and Mont Farlagne, the most popular ski hill in the Province. In addition, the Madawaska Weavers operate a provincially unique craft production facility in St. Leonard. Score: 14/20.

There are **free trade zone** implications for the Edmundston/Grand Falls area. Both Edmundston and Grand Falls contain major shopping facilities which involve brand name stores. Outlets located in this area would be competing directly with existing local retailers. Grand Falls and Edmundston are 39 kilometres apart. Score: 8/15.

Visibility of any proposed location in the Edmundston/Grand Falls area will depend on the location in relation to the TCH. The proposed realignment of the TCH may affect visibility. Score: 10/15.

Several factory outlets are found in the region including the Madawaska Weavers and J.M.L. shirts. In combination with these outlets, the presence of regular retail outlets constitutes a form of **critical mass** of shopping opportunities. It is not the preferred critical mass for value merchandisers who prefer a critical mass of similar outlets but it is, nonetheless, a critical mass. Score: 7/15.

Tourist traffic in the Edmundston/Grand Falls area occurs on a year-round basis due largely to the existence of the ski hill at Mont Farlagne. The Madawaska/Victoria/Carleton County area is, however, accordingly to the 1986 Canadian Travel Survey, the destination of choice of only 9 percent of New Brunswickers travelling in the province

resulting in approximately 300,000 person-trips in 1986. From the 1983 Auto-Exit Survey, 363,751 non-resident parties or 878,311 persons passed through Edmundston from May to October. Seventy-three percent of this volume was of Canadian origin and 24 percent of U.S. origin.

There were 253,836 non-resident parties or 649,282 persons passing through Grand Falls according to the same 1983 survey. Approximately 81 percent were Canadians and 16 percent were U.S. residents. The differences in volumes can be attributed to these parties taking Route 17 at St. Leonard towards Campbellton.

Only 57 percent of visitors to Edmundston were tourists compared to 71 percent for Grand Falls. The primary purposes of visit for both areas were passing through and sightseeing. Shopping was the primary purpose of visit for 10 percent of the traffic in the Edmundston area, while less than one percent of the traffic in the Grand Falls area cited this as the primary purpose. Score: 10/15.

In terms of demographics, Grand Falls and Edmundston will be discussed separately as they constitute two separate and distinct points. In 1986, Grand Falls had a population of 6,210 and a population within a 100 kilometre radius of 145,000. Average household income was \$24,606, 14 percent less than the Provincial average. Fifteen percent of residents over age fifteen had some university education; 54 percent had not completed high school. In 1986, Edmundston had a population of 11,495 with a population within a 100 kilometre radius of 145,000. Average household income was \$29,905, slightly higher than the provincial average. Twenty-two percent of residents over age 18 had some university education; 43 percent had not finished high school. Score: 4/10.

Development costs in the area would be relatively modest due to the availability of land in the area. Score: 6/10.

Access to an outlet site in the Edmundston/Grand Falls area would depend on location relative to the TCH. There are no definite plans to re-align the highway in the area. Score: 5/10.

The Edmundston/Grand Falls area has high traffic volumes and year-round visitation.
Gut feeling score: 5/10.

Sackville, N.B.

Annual average daily **traffic volume** on the TCH (Route 2) immediately north of Sackville, in 1988, was 10,650 vehicles, or 3.9 million vehicles annually. **Score:** 11/20.

Sackville does not have an **anchor** as defined in Section 4.1. Mount Allison University is a major employer in the community which contains only modest shopping facilities.
Score: 7/20.

Free trade zone implications for potential Sackville outlet locations include major shopping facilities in Moncton (53 kilometres) and Amherst, N.S. (20 kilometres). Although Moncton is outside the presently accepted free trade zone range (30 kilometres), it is a regional shopping destination of such magnitude that there will be free trade zone implications. **Score:** 9/15.

Visibility will depend on location in the Sackville or Sackville to Aulac area. The proposed re-alignment of the TCH in the area will also affect visibility. **Score:** 10/15.

There is no **critical mass** of shopping related facilities in the Sackville area although they are present in nearby Amherst. **Score:** 0/15.

Although Sackville itself receives very little **tourist traffic** (estimated at approximately 15,000 persons annually), the TCH past Sackville, to the New Brunswick border, is a major artery for tourist traffic. According to the 1983 Auto Exit Survey, 432,386 non-resident tourist parties or 1,078,475 non-resident tourists traversed that section of highway. In addition, there was also resident tourist traffic in the area. From the 1986 Canadian Travel Survey it was estimated that tourist visitation to the Kent/Westmorland/Albert region was 950,000 person trips. This region includes the Moncton area. **Score:** 12/15.

In 1986, Sackville had a population of 5,470 residents and a population within a 100 kilometre radius of 240,000. Average household income was \$29,576 annually. Education levels in Sackville are higher than the provincial average with 28 percent of the population over age 15 having university education while 44 percent did not complete high school. **Demographics** score: 5/10.

Development costs in Sackville would be moderately high as could be expected in a university community with limited available land. Costs would be lower outside the urban area adjacent to the TCH (near an exit) Score: 7/10.

Access will depend on the location of any outlet developments in relation to the re-aligned and twinned highway from Moncton to the Nova Scotia border. Score 4/10.

Although the Sackville area has large traffic volumes nearby, the lack of any attractions in the community and the free trade zone implications mitigate against outlet development. Gut feeling score: 4/10.

St. Andrews, N.B.

Traffic volume in St. Andrews is best measured at the intersection of Highway 1 and Route 127 in Waweig where average annual daily traffic in 1988 was 4,150 vehicles giving annual traffic of 1.5 million vehicles. Score: 6/20.

As one of the primary tourist destination areas in New Brunswick, St. Andrews possesses unique historic accommodation (The Algonquin), an aquarium, cultural and craft facilities and rugged attractive seashore. Potential developments include the development of Minister's Island and expansion of the Huntsman Marine Science Centre (aquarium). The international reputation of St. Andrews as a resort area which dates into the past century constitutes a form of **anchor**. The limiting factor is that St. Andrews is a summer destination with some shoulder season visitation. Were the Chocolate Theme Park to be constructed in nearby Oak Bay, this would also constitute a form of anchor. Score: 13/20.

There are no **free trade zone** limitations attached to potential development in or adjacent to St. Andrews. Score: 14/15.

Visibility will depend on the location chosen for development. Locations adjacent to Highway 1 would have high visibility and, if constructed as open malls facing the highway, would offer high visibility to individual stores. Score: 10/15.

Critical mass is not a factor in the St. Andrews area where there presently exist limited shopping opportunities and no outlets. Score: 0/15.

Tourist traffic in the St. Andrews area should be considered both in the context of actual visitation to St. Andrews and of tourist traffic passing by on Highway 1. From the 1983 Auto Exit Survey, 36,665 non-resident tourist parties or 98,218 persons passed through St. Andrews. The same survey confirmed that 613,053 non-resident tourists passed through St. Stephen most of whom would also have passed by St. Andrews on Highway 1. From the 1986 Canadian Travel Survey tourist visitation to the Charlotte/Kings/St. John region was estimated at 800,000 person trips. This includes St. Stephen, Saint John and Sussex. Score: 8/15.

In 1986, the population of St. Andrews was 1,615 persons and population within a 100 kilometre radius was approximately 210,000. Average household income was \$31,295, nine percent above the provincial average. **Demographics** score: 4/10.

Development costs on the St. Andrews peninsula would be relatively high as the area has long been a summer resort area. It is anticipated that land costs on Highway 1 would be less. Score: 7/10.

Access would be dependant on the location chosen. Were the outlet development to be located in St. Andrews, itself, access would be constrained by the limited capacity of the road system which is already strained by summer traffic. If the outlet development were located adjacent to Highway 1 access would be easier. Score: 5/10.

St. Andrews has an internationally recognized reputation as a summer resort which has endured for more than a century. It has food and accommodation services and

existing retail industry which, for the most part, would not conflict with outlet operations in that most of St. Andrew's retail outlets are small craft and souvenir shops and tourist oriented businesses. **Gut feeling score: 7/10.**

Sussex, N.B.

Traffic volume in the Sussex area is measured at the intersection of Routes 1 and 2. In 1988, average annual daily traffic at this location was 9,750 giving an annual total of 3.6 million vehicles. Sussex is a major juncture for vehicles travelling through New Brunswick from the United States and from Quebec to Nova Scotia, Prince Edward Island and Newfoundland (and in the reverse direction). **Score: 13/20.**

Sussex does not have an attraction or service that could be considered an **anchor**. The Sussex area does, however, offer year-round attractions and services including Poly Mountain Ski Hill, Animaland, the Hot Air Balloon Festival, a golf course, restaurants, accommodations and campgrounds. The community has modest shopping facilities. **Score: 12/20.**

The critical distance for **free trade zone** considerations as described in Section 4.1 is approximately 30 kilometres. From Sussex, the distance to Saint John is 45 kilometres, to Moncton, 47 kilometres and Fredericton, 75 kilometres. Sussex, itself, has modest shopping facilities with a limited number of brand name stores. **Score: 14/15.**

Visibility would be dependant upon location of the potential facility in relation to the bulk of the traffic. A location adjacent to the Sussex area exits from the TCH would offer high visibility. Consideration would have to be given to the implications of the proposed realignment and twinning of the highway and how it would connect with Highway 1. **Score: 10/15.**

Critical mass is not a factor in the Sussex location. The area presently has no outlets and only modest shopping facilities. **Score: 0/15.**

The Sussex area has one of the highest volumes of **tourist traffic** in the Province due primarily to its location at the juncture of two major highways. From the 1983 Auto Exit Survey, 370,651 non-resident tourist parties or 958,533 persons passed through the area from May to October. Forty-seven percent of this sample identified sightseeing as their primary purpose of visit while 36 percent indicated that they were passing through the area. This high level of pass-through traffic is reflective of the strategic location of Sussex and the modest nature of the area tourism industry. The existence of Poley Mountain Ski Hill allows for winter tourism. In 1983, less than one percent of non-resident travellers identified shopping as their primary purpose of visit. From the 1986 Canadian Travel Survey to the Charlotte/Kings/St. John region was estimated at 800,000 person trips. This region includes St. Stephen, St. Andrews and Saint John. Score: 12/15.

In 1986, Sussex had a population of 4,115 and the population within a 100 kilometre radius was 340,000 reflecting the strategic location of Sussex in relation to Fredericton, Saint John and Moncton. Average household income in Fredericton, Saint John and Moncton were \$34,215, \$28,089 and \$31,310 respectively. **Demographics.** Score: 7/10.

Development costs will depend on the location of the potential facility. A location within the municipal boundaries of Sussex would reflect costs of land in incorporated areas. Development adjacent to the TCH but outside the municipal area would involve potentially smaller land costs but increased costs of services. Score: 7/10.

Access will be dependant upon location. At Sussex, a major interchange distributes traffic to New Brunswick's three major cities; the intersection of Route 1 and the Trans-Canada Highway results in traffic from Fredericton, Saint John, and Moncton passing through the Sussex area. Off of the TCH, there are multiple exits leading into Sussex. There are no definite plans in place to further develop the highway at this location, but there will likely be future plans; although the traffic circle will stay, the highways leading into it may experience some change (B. McEwing, pers. comm.). Access within the Town of Sussex would be constrained by the limited capacity of the municipality road network. Access would be better adjacent to the major interchange on the TCH. Score: 5/10.

The strategic location of Sussex in south central New Brunswick at the juncture of Highway 1 and 2 in addition to its location in relation to Fredericton, Saint John and Moncton make it a strong candidate for consideration as a value merchandising location. In addition the area has a modest year-round tourism industry. Gut feeling score: 9/10.

Bathurst, N.B.

The average annual daily traffic in 1988 measured near the intersection of Routes 8 and 11 south of Bathurst, was 11,590 vehicles which translates into 4.2 million vehicles annually. This **traffic volume** represents a count at a single point only but it is at the major intersection in the area. Score: 14/20.

There is no **anchor** in the Bathurst area as described in Section 4.1. Bathurst, however, is a regional service centre and shopping destination in the northeast. The area offers access to the ocean, accommodations, food services and a broad range of regular retail shopping facilities in addition to being located adjacent to the Acadian Peninsula, one of the premier tourist destinations in the province. Score: 13/20.

There are significant **free trade zone** implications when considering location of value retailing outlets in the Bathurst area. Bathurst is a major shopping destination in the Province's northeast. The selection of retail outlets includes many brand name stores which would be affected by the location of a value retailing mall in the immediate area. Score: 3/15.

Visibility would depend on the location of the potential outlet facility. Score: 10/15.

Although Bathurst does not currently have any value retailing outlets in the immediate area, the broad range of shopping facilities constitutes a form of **critical mass**. Score: 5/15.

From the 1983 Auto-Exit Survey, 145,000 non-resident tourist parties or 362,332 persons passed through Bathurst. **Tourist traffic** also includes resident traffic but this is not documented. Eighty-three percent of the non-resident traffic in 1983 was

Canadian in origin with 55 percent from Quebec and 17 percent from Ontario. Sightseeing was listed as the primary purpose of travel for 63 percent of these non-resident visitors while 23 percent were visiting friends and relatives. Shopping was the primary purpose of travel for one percent of those interviewed. It should be noted that Bathurst is located adjacent to the Acadian Peninsula tourism destination area. The Acadian Peninsula is a favourite destination of Quebec residents as evidenced by the 55 percent of non-resident traffic originating in Quebec. Many visitors to the Acadian Peninsula use accommodation facilities in Bathurst. From the 1986 Canadian Travel Survey, it was estimated that tourist visitation to the Restigouche/Gloucester/Northumberland region in 1986 was 650,000 person-trips. Newcastle/Chatham is also in this region. Score: 7/15.

In 1986, the population of Bathurst was 14,680 with a population within a 100 kilometre radius of 175,000. Average household income in 1986 was \$29,281 annually. Nineteen percent of Bathurst residents had some university education while 49 percent had not finished high school. **Demographics** score: 4/10.

Development costs, were potential value retailing outlets to be located outside city limits on Highways 8 or 11 near an interchange would be relatively high as much of the land on the city's outskirts is in demand for retail and industrial uses. Score: 6/10.

Access would depend on the location of the potential facilities in the area. Adjacent to an intersection on a main thorough fare, access would be good. Score: 6/10.

Although Bathurst is a major service area for the northeast and is located adjacent to the Acadian Peninsula tourism destination area, the free trade zone implications of locating value retailing outlets in the area would constrain development. **Gut feeling** score: 3/10.

Newcastle/Chatham, N.B.

Highest **traffic volume** in the Newcastle/Chatham area is on Route 8 north of Douglastown where the average annual daily traffic was 11,950 vehicles in 1988 or approximately 4.4 million vehicles annually. Score: 14/20.

The Newcastle/Chatham area does not have an **anchor** as defined in Section 4.1. The area has a very popular Irish Festival annually and is situated at the mouth of the world renowned Miramichi River.

A major Irish Cultural Heritage Facility is proposed for Chatham but there are no firm plans to proceed with this project. The Miramichi Shipbuilding Museum project is currently being implemented in Newcastle but would not constitute an anchor. Score: 7/20.

The Newcastle/Chatham area is a shopping destination for the Miramichi and the southern portion of the Acadian Peninsula. As a result there are several shopping centres in the area and free-standing retail outlets in both the downtowns. Brand name stores are found in both locations, although primarily in the Northumberland Mall located on Highway 8 at the intersection of Highways 8 and 11. Location of a value retailing facility in the area would contravene recognized **free trade zone** restrictions. Score: 3/15.

Were a value retailing development to be considered for the area, the most likely location would be on Highway 8 near the existing Northumberland Mall due to the large volumes of traffic which attracted the Mall originally. **Visibility** in this area would be excellent. Score: 10/15.

The existing shopping facilities in the Newcastle/Chatham area constitute a form of **critical mass** although there are no existing value retailing outlets in the area. The shopping facilities are more modest than those in Bathurst, immediately to the north. Score: 2/15.

From the 1983 Auto Exit Survey it is estimated that non-resident tourist visitation to the Newcastle/Chatham area was 102,803 parties or 251,971 persons. Eighty-three percent of this traffic was Canadian; Quebec (40 percent), Ontario (22 percent) and Nova Scotia (15 percent) were the main Provinces of origin. From the 1986 Canadian Travel Survey, tourist visitation to the Restigouche/Gloucester/Northumberland region was estimated at 650,000 person-trips. The Bathurst area is also found in this region.

In 1986, the towns of Chatham and Newcastle had a combined population of 12,025 with a population within a 100 kilometre radius of 165,000. Average household incomes in Chatham and Newcastle in 1986 were \$27,175 and \$27,464 respectively. Of area residents, 17-20 percent had some university education while 45-48 percent had not completed high school. **Demographics** score: 4/10.

Should the potential outlet development be located in the same general area as the Northumberland Mall (where the highest traffic count in the area is found) **development costs** would be relatively high as that particular stretch of property is regarded as prime commercial real estate. Score: 6/10.

Although the Newcastle/Chatham area has high traffic counts, the free trade zone implications and the lack of anchor in the area mitigate against development of value retailing in the area. **Gut feeling** score: 3/10.

Moncton, N.B.

The City of Moncton is currently considering the potential for establishment of a value retailing mall at Magnetic Hill as part of their ongoing development of the area. Current developments include Magic Mountain water theme park, the Magnetic Hill Game Farm and shops/boutiques catering to visitors to the attractions. For purposes of this analysis, the Magnetic Hill area will be used as the potential location to be evaluated.

Traffic volumes in Moncton in 1988, as measured in the urban area at a major intersection was 19,490 vehicles (average annual daily traffic) or 7.1 million annually. Average annual daily traffic on the TCH east of the Lower Mountain Road turnoff was 11,200 vehicles giving annual traffic of 4.1 million. The average annual daily traffic adjacent to the Magnetic Hill turnoff is 6,860 vehicles or 2.5 million annually. Score: 17/20.

The shopping opportunities already existing in the Moncton area, the area tourism attractions and the accommodations/restaurants available in the area constitute a

significant **anchor** which is further emphasized by the city's strategic location as the "hub" of the Maritimes. Moncton is strategically located to take advantage of visitors to Kouchibouguac and Fundy National Parks, Fort Beausejour National Historic Park, Bonar Law Farm (provincial historic park), Shediac area attractions, Magnetic Hill and the development at Magic Mountain. Score: 16/20.

There are significant **free trade zone** implications for the establishment of a value retailing facility in the Moncton area. Moncton is a regional shopping destination for southeast New Brunswick with a high concentration of retail outlets marketing brand name products. There is a "factory outlet" located in Champlain Mall (Benetton) but it represents only a small portion of the store primarily marketing first line goods. Outlets located at Magnetic Hill would be well within the currently accepted free trade zone. Score: 2/15.

Visibility of a value retailing mall located in the Magnetic Hill area would be high. It would potentially be visible from the TCH (as many of the other attractions are), could be well signed and would benefit from the flow of vehicles to other attractions. Score: 12/15.

Although there are no factory outlets in the area (other than Benettons) there is a **critical mass** of shopping opportunities which would contribute towards the potential success of value retailing facilities. Score: 7/15.

Tourist traffic in the Moncton area is the highest in the Province. From the 1983 Auto-Exit Survey, non-resident tourists passing through Moncton numbered 165,139 parties or 413,639 persons. From the same survey, 331,213 non-resident tourist parties or 852,627 persons were surveyed in Riverglade, immediately west of Moncton. According to the 1986 Canadian Travel Survey, the Kent/Westmorland/Albert region in the centre of which Moncton is located was the most visited region in the Province with approximately 950,000 person-trips annually. The area contains some of the most outstanding tourist attractions and services in the Province and is strategically located in relation to tourist traffic travelling in the Maritimes. The location being considered by the City of Moncton is part of the overall Magnetic Hill Development. Score: 13/15.

The second largest urban area in the Province, Moncton, in 1986, had a population of 55,465 with a population within a 100 kilometre radius of 230,000. The average annual household income in Moncton in 1986 was \$31,310. Twenty-one percent of residents had some university education while 44 percent had not finished high school. **Demographic score: 5/10.**

Development costs in the Magnetic Hill area would be relatively high. The developments at Magnetic Hill (Magic Mountain, Game Farm, shops, accommodations, etc.) have raised the price of land in the area. **Score: 5/10.**

Access to the potential site at Magnetic Hill would be excellent. It is adjacent to the TCH and the largest tourist attraction in the area. The exit is well signed. **Score: 6/10.**

The Moncton area has many attributes which make it desirable as a potential value retailing location. The perceived free trade zone constraints may be lessened by the strength and size of the existing retail industry in the area and by sensitive choice of outlet to be located in the potential development. **Gut Feeling score: 8/10.**

Saint John, N.B.

Traffic volume in Saint John, as measured at the intersection of Routes 1 and 7 east of Saint John, was the highest of any points sampled in the Province. The average annual daily traffic, in 1988, was 25,430 giving an annual total of 9.3 million. **Score: 18/20.**

In addition to a wide variety of shopping opportunities, the City of Saint John contains natural and manmade attractions that have made it a shopping tourist destination for southern New Brunswick. Features include the Reversing Falls, Market Square, City Market, Aquatic Centre, Cherry Brook Zoo, Rockwood Park, Festival-by-the-Sea, Loyalist Days and the New Brunswick Museum. In conjunction with extensive shopping facilities, accommodations and restaurants, the city itself becomes a form of **anchor** for development. **Score: 16/20.**

Similar to other urban areas, the potential location of value retailing outlets in the immediate Saint John area would involve serious **free trade zone** implications. Many retail outlets in Saint John market brand name goods such that manufacturers attempting to open outlets would find themselves in conflict with their regular wholesale accounts. Score: 2/15.

Visibility of the facility would depend on the location. Any location adjacent to a major intersection and highway would have adequate visibility. Score: 10/15.

The extensive retail facilities already found in Saint John, although they do not include value retailing outlets would contribute towards **critical mass** considerations for the area. Score: 7/15.

According to the 1986 Canadian Travel Survey, the Charlotte/Kings/St. John region experienced the second highest **tourist traffic** in the Province behind Moncton with approximately 800,000 person trips. From the 1983 Auto-Exit Survey, pass through traffic (non-resident tourists) for the City of Saint John was 234,394 parties or 607,611 persons. Score: 12/15.

Saint John is the largest city in the Province with a population in 1986 of 76,380 and a population within a 100 kilometre radius of 260,000. The average household income in 1986 was \$28,089. Twenty-eight percent of Saint John residents had some university education and 48 percent had not finished high school. **Demographics** score: 6/10.

Development costs within Saint John would be relatively high because of high land costs associated with urban area development. Score: 5/10.

Access would depend on the location chosen. Access off of the main highways through Saint John would be limited to existing interchanges. Were the potential facility to be located on a highway without limited access, access would be improved. Score: 5/10.

Saint John possesses many attributes which would contribute towards success as a potential value retailing outlet location. The free trade zone constraints may limit potential in this area. **Gut feeling** score: 7/10.

Fredericton, N.B.

Accurate **traffic volume** counts are difficult to obtain for the Fredericton area due to the large number of arteries feeding into the city. Average annual daily traffic count in 1988 on the TCH at the Princess Margaret Bridge was 16,020 giving a total of 5.8 million vehicles annually. Score: 16/20.

The capital of New Brunswick and location of several institutions of higher learning, Fredericton is a regional shopping destination for south/central New Brunswick. With the retail mall expansions underway Fredericton will rival Moncton as the shopping destination in the Province. In addition, Fredericton has tourist attractions such as Kings Landing, Woolastock Wildlife Park, Mactaquac Provincial Park and ski hills at Crabbe Mountain and Silverwood. The city also offers a selection of accommodations and restaurants as well as historical and cultural attractions. Taken together all of these attributes constitute a form of **anchor**. Score: 14/20.

The role of Fredericton as a regional shopping destination and the variety of brand name retailers in the area will pose serious **free trade zone** problems when considering potential establishment of value retail outlets in the area. Movement of the potential development outside the 30 kilometre limit is not practical as it would negate most of the advantages of locating in the Fredericton area. Score: 2/15.

Visibility would depend on the location chosen. Consideration would have to be given to the potential re-alignment and twinning of the TCH. Score: 10/15.

The Fredericton area has and is acquiring (with construction underway) sufficient regular retail space to constitute **critical mass** in relation to shopping opportunities. Score: 7/15.

Using data from the 1986 Canadian Travel Survey, it is estimated that for the York/Sunbury/Queens region, **tourist traffic** was approximately 750,000 person-trips. From the 1983 Auto Exit Survey, 256,715 non-resident tourist parties or 662,539 persons passed through the Fredericton area from May to October of 1983. Forty-one percent of those non-resident travellers listed passing through as their primary purpose of visit while 39 percent indicated sightseeing as their primary purpose. **Score: 11/15.**

In 1986, Fredericton had a population of 44,350 with a population within a 100 kilometre radius of 295,000. Average household income in 1986 in Fredericton was \$34,215. Thirty-four percent of residents over age fifteen had some university education while 35 percent had not completed high school. **Demographics. Score: 6/10.**

Development costs in the Fredericton area would be relatively high due to high demand for prime property for retail purposes. The ongoing construction of retail/commercial space has pushed up land prices significantly. **Score: 5/10.**

Access to a potential value retailing outlet in the Fredericton area would depend on location in relation to major interchanges on the TCH. The proposed re-alignment and twinning of the TCH will be critical factors in relation to access. **Score: 5/10.**

The Fredericton area possesses many of the attributes necessary for success of a value retailing venture. Success in this location will be affected by free trade zone considerations. **Gut feeling score: 6/10.**

APPENDIX "F"

SELECTED NEW BRUNSWICK MANUFACTURERS

ABBREVIATION

CNO

Min/Max

MEANING

Company number according to the 1989 Director of
Products & Manufacturers database

Minimum and maximum levels of employment

FISH PROCESSING FIRMS

CNO	NAME	PHONE	MIN	MAX
293	Association Cooperative des Pecheurs de	344-2204	225	800
718	Connor's Bros. Limited	456-3391	400	700
1144	Connor's Bros. Ltd., Shippagan Division	336-4791	10	700
648	Paturel's Seafood Limited	532-4431	30	650
788	Westmorland Fisheries Ltd.	577-4325	6	410
719	Welch, H.W. Company Reg'd	747-2250	30	400
638	Buctouche Fish Market Ltd.	743-8935	15	400
1148	P cherles F.N. Fisheries Ltd.	336-2360	10	350
723	Cape Bald Packers Limited	577-4316	15	300
5032	Boreal Seafoods Ltd.	727-6020	250	300
1132	Gully Fish and Food Products Co. Ltd.	336-2278	10	300
716	Connor's Bros. Ltd.	755-3371	10	280
2086	P cherles MPQ Ltée/MPQ Fisheries Ltd.	727-3743	3	270
1109	Produits Belle Baie Ltée (Belle Baie Pro	727-4414	12	259
1125	Pcherles Belle Ile Fisheries Ltd.	344-8009	2	250
740	Cormier & LeBlanc (1968) Ltd.	577-4307	3	250
715	Star-Kist Foods Canada Inc. (Ocean Maid	529-8871	220	250
760	Landry and Landry (1984) Ltd.	577-4361	180	225
1459	P cherles Cap-Lumière Fisheries Ltd.	523-4445	200	225
1540	P cherles St-Paul (1989) Ltée	727-7247	125	200
619	Mills Seafood Ltd.	743-2444	4	200
755	Gagnon, Edmond Ltd.	532-2445	150	200
1209	Alfo Fisheries Ltd.	783-4251	20	200
711	Shediac Lobster Shop Ltd.	532-4302	175	200
734	Leger, Leslie & Fils Ltée	577-4730	50	185
1869	Carapro Ltée/Ltd.	727-3462	7	182
2481	Ocean FloSeafood Ltd.	727-7211	25	175
2654	Atlantic Silver Ltd.	755-3304	123	162
2492	Crown Seafoods Ltd.	876-2873	100	150
1658	Canadian Ocean Products Ltd.	732-5505	2	150
2367	Atlantic Seaharvest Co. Ltd.	395-6516	90	142
1176	Maisonnette Seafoods Ltd.	732-2839	3	135
287	Blue Cove Packing Co. Ltd.	732-2839	3	130
2366	Acadia Packers Limited	336-2278	50	130
2593	Flagg, Roland	662-3468	6	126
720	Connor's Bros. Limited	662-8477	75	125
889	Albert and Sons Fisheries Ltd.	776-8233	60	125
1569	Poissonnerie R & G Cormier Ltée (La)	732-2995	1	125
2488	P cherles de Chez-Nous Ltée	395-6678	20	110
884	Cooperative des Pecheurs de Baie St-Anne	228-4444	15	110
2071	O'Neill, Raymond & Son Fisheries Ltd.	228-4794	4	105
2480	P cherles G.E.M. Ltd.	727-5217	35	102
2250	Produits de P che A.Jones (Les)/A.Jones	344-7531	2	100
1781	Morue Imperiale Ltée (La)	344-7819	1	100
721	Welch, H.W. Company Reg'd	752-2097	8	100
629	Richard, B.A. Ltd.	743-6198	3	100
2653	Seafarm Canada Inc.	633-5897	80	90
1635	Village Bay Oyster Co. Ltée	523-6479	70	85
1140	McGraw Sea Food Ltd.	395-3374	7	80
781	Richibouctou-Village Fishermen's Co-Oper	523-4520	4	80
2210	Nageoire Ltée (La)	336-8808	1	80
1517	Special K Fisheries Ltd.	662-8431	11	75
396	P cherles Roma Ltée	732-5361	4	65
1760	Poisson Raymond Ltée	743-5627	10	65
2589	P cherles W.C. Ltée	344-2432	2	60
717	Connor's Bros. Limited	456-3388	20	60
1844	Ellis Seafoods Ltd.	546-3410	3	60
2465	P cherles Halbay Fisheries Ltée	344-5517	1	55
750	LeBlanc, Emile C. & Fils Ltée	577-4323	20	50
2084	Sea Tide Import & Export Ltd.	577-4070	1	50
1571	Acadia Seafoods Ltd.	532-9591	5	45
1527	Botsford Fisheries Ltd.	577-4328	15	45
2467	Deer Island Salmon Ltd.	747-2303	25	45
1530	Heishiron Fisheries Ltd.	662-3502	8	35
2283	Harbour De Loutre Products Ltd.	752-2255	17	35
1795	West India Trading Co. Inc.	577-6214	3	35
722	Brine, Roger D. Ltd.	577-2917	5	35
1833	J. & J. Fisheries Ltd.	523-6917	8	35
2368	Ocean Pier Inc.	577-4797	25	35
736	Boudreau, Alvin & Ruffin	577-2264	4	32
1630	Pendleton Fisheries Limited	747-2935	15	30
730	Gaudet & Ouellette Ltd.	577-4016	5	30
802	Atlantic Mariculture Ltd.	662-8150	1	30

FISH PROCESSING FIRMS (CONT'D)

CNO	NAME	PHONE	MIN	MAX
2590	P cherles W.J. Fisheries Ltd.	344-7106	20	30
1794	Trenholm, H. Fish Ltd.	538-7704	1	30
765	Ouellette, Philippe & Son Ltd.	577-2560	4	30
1481	Ingersoll, John L. & Sons Ltd.	662-3577	15	30
1284	Kent Fish Products Ltd.	743-5627	15	25
732	Thaddé & Alvére Fisheries Ltd.	577-2824	20	25
1825	Jail Island Salmon Ltd.	755-3321	20	25
2447	St. Thomas Fish Market	743-5965	20	25
2318	Poissonnerie Arseneau Fish Market Ltée	783-2195	3	25
1793	Cormier, Adrice Ltée	577-2511	2	25
1862	P cherles Cap-Lumière Fisheries Ltd.	523-4489	10	25
1518	M.G. Fisheries Ltd.	662-3696	10	22
1841	Russell, Movey and Sons Ltd.	662-8406	10	20
1947	Back Bay Lobsters Ltd.	755-3311	6	20
729	Duguay Fish Packer Ltd.	577-2287	2	20
2328	Whole Family Fishery	662-3437	6	20
2477	Caissie Shellfish Ltd.	532-6954	5	20
2487	Marché de Poisson M. Lanteligne	336-4850	10	20
748	R. & G. Jacob Seafoods Ltd. / Produits d	577-2766	15	20
1564	Produit Blan-Din Ltée	727-2004	12	20
751	Boudreau Farm & Sea Products Ltd.	577-2761	2	20
770	Amco Fisheries Ltd.	577-4175	3	20
785	LeBlanc, Norbert & Elphege Ltd.	577-6301	4	20
1131	Bulger Fish Market Ltée	336-8232	12	20
797	Lomax Enterprises Ltd.	659-3090	4	20
1789	Petit Cap Fisheries Ltd.	577-2885	10	18
300	Morse & Zwicker Ltd.	662-8225	15	18
787	Ouellette Sea Products Ltd.	577-4742	7	16
786	Norco Fishery Ltd.	577-4537	8	15
2646	Val Comeau Fish Center Ltd.	395-2542	1	15
297	St. Laurent Gulf Prod. Ltd., Produits de	727-5465	12	15
2212	Phinney Fisheries	752-2419	6	15
1124	Produit de Pêche H. Savoie Ltée	344-8307	1	15
2013	Landry Shellfish Ltd.	529-3703	4	15
1839	Green's Sea Products Ltd.	662-3661	3	15
1838	Little Rock Fisheries Limited	662-3461	3	15
1681	Marché de Poisson Landry Inc.	732-5557	2	15
1803	Leger, Alpheé and Pierre	577-6100	1	15
1902	Eastern Sea Products Ltd.	523-9622	2	15
2489	Poissonnerie S.B.L.	727-6321	10	14
2069	D&J Fisheries (Division of Ben's Island	662-3673	10	14
1575	Fundy Fish Ltd.	635-1300	12	14
1483	Small, F. and J. Ltd.	662-8585	4	13
2483	Silliphant Processing Ltd.	755-6351	8	13
2482	Fundy Lobsters Ltd.	662-3144	4	12
1837	W.E. Acres Crabmeal Ltd.	577-6357	2	12
2479	Simpson, M.D. & Son	538-7752	1	12
816	Small, James	662-3173	1	12
1976	Seaco Limited	662-3328	2	12
1628	Sippley's Fisheries Ltd.	228-4457	4	12
279	Jacob Fisheries Ltée	577-6513	8	11
2468	Ferme Ostréicole Chiasson ENRG (Le)	344-7133	3	10
2470	Ferme Ostréicole Dugas Ltée	727-4619	1	10
1804	Doiron, Roger	577-6163	3	10
742	Gaudet, Albert F.	577-4077	6	10
2172	South Shore Trading Co.	538-7619	3	10
1624	Fundy Bay Seafood	659-2890	4	10
1904	Chiasson, S.P. Poissonnerie Ltée	344-2269	2	10
2008	Hu tre de Miscou Oyster Enrg. (L')	344-7811	2	10
1310	P cherles Continental Fisheries Ltée (Le)	732-2839	1	10
2466	Seafresh Aquaculture Products Ltd.	755-3437	4	9
1682	Marché du Poisson de Pokesudie Ltée (Le)	727-7517	4	9
1180	Savoie, Emery J. & Sons Ltd.	776-3243	1	9
737	Seashore Fisheries Ltd.	577-6332	5	8
2647	Brun, Norbert	577-6373	6	8
1997	Cooke's Shellfish Ltd.	755-3048	6	8
1788	G.L. and Sons Fish Processors Ltd.	577-2817	3	8
2440	Ocean Crest Ltd.	755-2524	5	8
2469	Fundy Salmon Ltd.	755-2841	3	8
2348	Frigault, Alban Marché De Poisson	727-3069	2	6
2028	Northern Clams Ltd.	752-2963	5	6

FISH PROCESSING FIRMS (CONT'D)

CNO	NAME	PHONE	MIN	MAX
1126	Blanchard, Maurice	344-7449	2	6
2485	Jalliet, Alterice	743-6751	3	5
1291	Richard Fish Products Ltd.	523-9303	2	5
1390	Terry's Fish	763-2617	3	5
768	James Brine Fish Packers Ltd.	538-7579	1	5
3449	Trico Seafoods Ltd.	387-8175	3	4
1732	Carroll Fisheries	662-3733	2	4
1570	River Valley Fish Co. Ltd.	488-3370	2	4
2478	Caraquet Aquaculture Ltée	727-6744	1	3
302	Etang Ruisseau Bar Ltée	336-8749	1	3
1739	Spring Rocks Fisheries Ltd.	662-8627	3	3
5152	Roger Breau Fish Exporters	857-1729	1	3
791	Chamcook Seafoods Ltd.	529-3344	1	2
1735	Fundy Aquaculture Ltd.	662-8404	2	2
2486	Cuisine Cajun Cuisine Ltée	395-6668	1	1
1912	Poissonnerie Savoie (La)	344-8666	1	1
FINAL TOTALS			3628	13788
TOTAL				
COUNT 160				

SUGAR & CHOCOLATE CONFECTIONARY

CNO	NAME	PHONE	MIN	MAX
810	Ganong Bros. Limited	466-1220	180	225
714	LaSalle Confections Limited	532-3401	13	33
2153	Valley Confections Ltd.	474-0351	1	9
2471	Sucreries LeBlanc Sweets Ltée	532-4591	2	8
FINAL TOTALS			196	275
TOTAL				
COUNT 4				

LUGGAGE, PURSE & HANDBAG INDUSTRY

CNO	NAME	PHONE	MIN	MAX
2252	Wheeler Accessories Ltd.	458-0991	9	12
FINAL TOTALS			9	12
TOTAL				
COUNT 1				

CLOTHING INDUSTRY

CNO	NAME	PHONE	MIN	MAX
1066	Chemise J.M.L. Ltée (La) - J.M.L. Shirt	735-5596	200	300
1757	Myli Sportswear Ltd.	739-6331	75	80
1738	B.N. Sportswear Ltd.	445-2360	60	80
2021	Confections S.A.R. Inc. (Les)	739-9538	55	75
1028	Chemise J.M.L. Ltée (La) - J.M.L. Shirt	473-3398	50	70
1863	Confection B.L. Inc.	992-3551	60	70
1961	Marilyn Sportswear Ltée	263-5876	30	60
2258	Chemise Goldstar Inc.	473-6123	56	56
2412	Confection 4e Dimension Ltée	423-7660	45	55
1773	Karine Sportswear Ltd.	739-6183	40	55
1964	Edith Sportswear Ltd.	263-5990	45	50
2430	Modes Carl Fashions Inc.	759-9779	35	40
1014	Tisserands Madawaska Weavers Ltd. (Les)	423-6341	30	40
2510	Andrée-Anne Sportswear Ltd.	743-8914	28	35
2575	Modes Atlantic Fashions Inc.	759-9779	30	35
2229	V tements P.D.G. Ltée (Les)	739-8737	23	30
2391	Unitex N.B. Company Ltd.	858-5665	20	30
2158	Manon Sportswear Ltd.	992-3568	25	25
2142	Confections Restigouche Inc.	826-2520	20	25
2180	C'Mon in Sportswear	576-7807	12	20
1555	V tement Petit Fleur Inc. (Le)	473-2352	16	20
1067	Chlason, L. Fourrures-Furs Ltd.	735-4738	10	19
2278	Workers Tailor Ltd./Ltée (The)	548-3188	13	15
1856	B. & B. Custom Sportswear	857-0166	14	14
2617	Cana Gloves Ltd.	783-8866	6	10
1563	Corporation 2000 Ltd./Ltée	548-3835	1	10
2562	Whale Cove Knitters	662-3318	1	10
2556	Shaunel Collection (The)	384-4902	2	8
2319	B.J. Fourrures/Furs Ltée	783-4860	2	8
2624	Little Liberties Inc.	453-0154	8	8
1715	Bend Knitting Company Limited (The)	388-4880	3	6
230	Cottage Craft Limited	529-3190	4	4
2041	Fourrure Lelièvre Ltée	727-5694	2	4
5066	Uniform Concepts Inc.	854-3050	2	3
2425	Sylvia's Dressmaking	633-1062	2	3
3528	Cigi Design Inc.	854-3050	2	3
2631	S & D Holdings Ltd.	634-0762	2	2
2532	Puffin Knitwear (T.B. Reg'd)	662-3375	1	1
FINAL TOTALS			1030	1379
TOTAL				
COUNT 38				

FOOTWEAR INDUSTRY

CNO	NAME	PHONE	MIN	MAX
13	Hartt Shoes, A Division of Church & Co.	458-8358	155	155
3461	Super Soles Inc.	455-7883	2	8
FINAL TOTALS				
TOTAL			157	163
COUNT 2				

FURNITURE & FIXTURE INDUSTRY

CNO	NAME	PHONE	MIN	MAX
1012	Nadeau & Nadeau Limited	992-2121	137	148
1440	Springwell East/Atlantic Sleep Products	532-4481	100	120
1867	Quality Woodwork Limited	857-8268	30	35
2704	Interdec Manufacturier Ltée	395-6970	10	30
2621	Irving Specialties Products Ltd.	743-2482	20	30
1633	Shorewood Furniture Ltd.	857-0726	20	25
579	Brunswicklab Ltd.	433-4850	15	20
2349	MARTONE	853-1990	12	16
2579	East Coast Furniture Mfg. (T.B.I.)	525-2493	5	15
1989	Country Comfort Center 1988 Ltd.	328-6800	13	15
2548	Noble, Dave (Woodworking) Ltd.	357-6929	10	12
2600	Stortec Inc.	459-8655	6	12
2382	L.L. Woodworkers Ltd.	532-8252	6	10
682	Stiefurniture Ltd.	857-4990	1	10
1988	Oak Leaf Enterprises Ltd.	633-0015	3	8
2950	Scotchtown Manufacturing	385-2007	8	8
527	Claessen, Peter & Sons Ltd.	672-4308	6	8
2327	Logan's Lawn Furniture Ltd.	366-5405	3	7
2117	Heritage Framing Specialties Ltd.	382-8441	3	6
2342	Print Gallery (The)	459-7493	3	6
2011	Pine, E.L. Manufacturing	459-3322	3	6
2613	Trout Brook Manufacturing Ltd.	622-4665	4	6
518	Clayton Woodworking	696-3700	2	5
2594	Lakeview Enterprise Ltd.	276-4205	2	5
2297	Arseneau, Roland	783-3356	1	5
2407	Wood-N-Things	832-7590	3	5
23	Butterfield's Upholstery Ltd.	459-0880	3	4
2352	Centre D'Art Ulrich	395-6590	4	4
574	Byers and Son Custom Woodworking	433-3297	2	4
2190	Falls Brook Woodworking	375-6550	1	4
1254	Idylwyld Studios	755-2280	2	4
1290	Potter Enterprises	876-2661	2	4
2474	Anthony's Carpenter Shop	755-3545	2	3
2576	Port Furnishings	634-0420	1	3
2400	Sleep Well Manufacturing Ltd.	357-9287	1	3
677	Artistic Upholstery	853-5025	3	3
3964	Cabinet Shop (The)	382-5153	2	2
2157	Ripley Woodwork	278-5485	1	2
548	Belleisle Pine Shop (The)	485-2390	2	2
2555	Cape Wood Works	379-2591	1	2
550	Village Sawmill (The)	847-5165	2	2
2062	Brunswick Manufacturing Ltd.	459-3838	1	2
562	Kippers, Roy Woodcrafts	847-4807	1	2
2314	A Frame Shop & Gallery (The)	388-4005	1	2
1348	Tobique Pine Furniture	356-2741	1	1
1512	Brunswick Rustic Furniture	473-1460	1	1
2034	Custom Woodworking	366-5794	1	1
2565	Cube-It File Corp./File Cube	634-8120	1	1
2096	Seaside Woodworks	672-8465	1	1
2445	Little Frame Shop	472-0123	1	1
FINAL TOTALS			464	631
TOTAL				
COUNT 50				

OTHER WOOD INDUSTRIES

CNO	NAME	PHONE	MIN	MAX
1012	Nadeau & Nadeau Limited	992-2121	137	148
1440	Springwall East/Atlantic Sleep Products	532-4481	100	120
1867	Quality Woodwork Limited	857-8268	30	35
2704	Interdec Manufacturier Ltée	395-6970	10	30
2621	Irving Specialties Products Ltd.	743-2482	20	30
1633	Shorewood Furniture Ltd.	857-0726	20	25
579	Brunswicklab Ltd.	433-4850	15	20
2349	MARTONE	853-1990	12	16
2579	East Coast Furniture Mfg. (T.B.I.)	525-2493	5	15
1989	Country Comfort Center 1988 Ltd.	328-6800	13	15
2548	Noble, Dave (Woodworking) Ltd.	357-6929	10	12
2600	Stortec Inc.	459-8655	6	12
2382	L.L. Woodworkers Ltd.	532-8252	6	10
682	Stiefurniture Ltd.	857-4990	1	10
1988	Oak Leaf Enterprises Ltd.	633-0015	3	8
2950	Scotchtown Manufacturing	385-2007	8	8
527	Claessen, Peter & Sons Ltd.	672-4308	6	8
2327	Logan's Lawn Furniture Ltd.	366-5405	3	7
2117	Heritage Framing Specialties Ltd.	382-8441	3	6
2342	Print Gallery (The)	459-7493	3	6
2011	Pine, E.L. Manufacturing	459-3322	3	6
2613	Trout Brook Manufacturing Ltd.	622-4665	4	6
518	Clayton Woodworking	696-3700	2	5
2594	Lakeview Enterprise Ltd.	276-4205	2	5
2297	Arseneau, Roland	783-3356	1	5
2407	Wood-N-Things	832-7590	3	5
23	Butterfield's Upholstery Ltd.	459-0880	3	4
2352	Centre D'Art Ulrich	395-6590	4	4
574	Byers and Son Custom Woodworking	433-3297	2	4
2190	Falls Brook Woodworking	375-6550	1	4
1254	Idylwyld Studios	755-2280	2	4
1290	Potter Enterprises	876-2661	2	4
2474	Anthony's Carpenter Shop	755-3545	2	3
2576	Port Furnishings	634-0420	1	3
2400	Sleep Well Manufacturing Ltd.	357-9287	1	3
677	Artistic Upholstery	853-5025	3	3
3964	Cabinet Shop (The)	382-5153	2	2
2157	Ripley Woodwork	278-5485	1	2
548	Belleisle Pine Shop (The)	485-2390	2	2
2555	Cape Wood Works	379-2591	1	2
550	Village Sawmill (The)	847-5165	2	2
2062	Brunswick Manufacturing Ltd.	459-3838	1	2
562	Kippers, Roy Woodcrafts	847-4807	1	2
2314	A Frame Shop & Gallery (The)	388-4005	1	2
1348	Tobique Pine Furniture	356-2741	1	1
1512	Brunswick Rustic Furniture	473-1460	1	1
2034	Custom Woodworking	366-5794	1	1
2565	Cube-It File Corp./File Cube	634-8120	1	1
2096	Seaside Woodworks	672-8465	1	1
2445	Little Frame Shop	472-0123	1	1
FINAL TOTALS			464	631
TOTAL				
COUNT 50				

BREWERY PRODUCTS INDUSTRY

CNO	NAME	PHONE	MIN	MAX
415	Moosehead Breweries Limited	635-7000	275	325
414	Labatt's New Brunswick Brewery (Div. of O	635-5050	141	165
2448	Hanshaus Brewery (Div/Bavarian Specialti	858-0660	10	10
FINAL TOTALS			426	500
TOTAL				
COUNT 3				

GLASS & GLASS PRODUCTS INDUSTRY

CNO	NAME	PHONE	MIN	MAX
896	Consumer's Glass	532-4446	195	280
2083	Vitreries de Lamèque Ltée (Les)	336-8202	1	3
FINAL TOTALS			196	283
TOTAL				
COUNT 2				

OTHER LEATHER & ALLIED PRODUCTS

CNO	NAME	PHONE	MIN	MAX
1447	Sackville Harness Limited	536-0642	5	5
2125	Hansen Leather Manufacturers Ltd.	384-2625	3	5
609	Atlantic Leather Products Inc.	382-1237	2	2
2630	Leather Peddler (The)	634-0764	2	2
668	Kierstead Canvas & Harness	386-3374	1	1
FINAL TOTALS			13	15
TOTAL				
COUNT 5				

TOYS & GAMES INDUSTRY

CNO	NAME	PHONE	MIN	MAX
2649	Chums & Co. Inc.	759-9239	6	7
1967	Plumpkins Ltd.	328-2279	3	3
2637	Ann Marie Porcelain Productions	375-8754	2	3
2403	Jensen's Woodcrafts	553-6828	1	1
FINAL TOTALS			12	14
TOTAL				
COUNT 4				

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