Executive Summary Sussex Market Study

In late 2007 Sussex Common Council called for proposals for the development of a Sussex Market Study. The data to be assembled was well conceived in the proposal call as it would touch on all the critical elements which impact retail and development activities. The collection would form a comprehensive and exhaustive array of information which would enable the end user to understand and appreciate the demographic composition of it's trade area; understand how traffic flows are occurring in and around the trade area as well as establish various mediums which would allow for communication with its desired target market.

The data is static, reflective of information at a particular point in time however the data is arranged and presented in such a fashion that components can be regularly updated. This flexibility allows the Municipality to continually present information to the end user which reflects the best information available at that moment. This is important as we know and understand retail and development is dynamic and ever changing. This collection and presentation of data will be able to morph with the marketplace as Sussex enjoys its impending boom.

The information was assembled and presented under a multitude of headings; Town, Village and Parish Profiles, Forward Sortation Areas (Canada Post Data), Traffic Analysis; both Sussex proper and major feeder routes as well as the various local and regional media contact information.

Town, Village and Parish Profiles

There are 31 Towns, Villages or Parishes (TVPs) located in what is considered to be the Sussex trade area. Standardized mapping indicates the location of each TVP for consistent referencing. Each profile provides data in tabular and or graphical format on the following items; Population and Dwelling Counts, Occupied Private Dwellings, Select Household Characteristics, Education Levels and Earnings. All data is presented against the backdrop of the Provincial data which allows the user to find the unique elements of a particular area or TVP when measured against the rest of the Province.

Population and Dwellings Counts provide insight into the composition of each of the 31 TVPs both in terms of age groupings (by 5 years) well as by gender. This data is key in that it demonstrates the chronological make up of its residential base. These characteristics will provide insights as to where a particular community is in its life cycle as well as give hints as to what retail goods and services it might require.

Occupied Private Dwelling

This section provides insight into the typical dwelling type with a particular TVP. Such characteristics as percentage of dwellings owned and dwellings rented help the user appreciate the needs of a community. Construction trends and dwellings requiring major repairs are also accounted for giving further insight as to the development activity and state of improvements in any particular area. Dwelling data provides glimpses into the prosperity of a particular area.

Selected Household Characteristics

The end user is able to see the composition of households within any particular TVP. The households may be empty nesters, families, marriages or singles. Each of these household arrangements brings with it very specific spending habits and needs.

Education

This section displays the various educational levels achieved both by age and gender. Education levels ranging from high school to university degree are categorized. Again the various TVPs can be referenced against the Provincial numbers to see variances in any of the sections/categories.

Earnings

This section provides information about the total household earnings, average household earnings as well as the earning differentials by and between genders. Again this data is shown in juxtaposition to the Provincial information for comparative reasons. Earning is a key piece of the retail puzzle; it provides the basis for which demand for particular products or services can be actualized. Without effective purchasing power, demand may not result in expenditure.

Canada Post-Forward Sortation Areas(FSAs)

There are 10 FSAs in the Sussex Market area. Again for consistent referencing these areas are plotted over the standardized Sussex Market Area map. This allows the user to visualize the particular geographical area captured by the FSA.

Each FSA is broken down by delivery locale; houses, apartments, farms, total residences, businesses and district totals. The district totals are also represented by rural routes, general delivery, lock boxes and call for. The FSA information reveals key data much like that contained in the TVP Profiles, the type of dwelling receiving the delivery which gives evidence as to the type of purchases or services required by dwelling. The FSA is further broken down by Rural Routes for the larger FSAs.

FSAs provide detail on two levels; information about the type of dwelling receiving delivery in the particular FSA as well as the population with any particular FSA. Direct mail has become an increasingly popular method of reaching customers with bulk mail outs. The FSAs allow the retailer to target geographical areas which may contain desired customers.

Traffic Analysis

This section provides traffic data on two distinct levels. The Provincial DOT data is mapped, again on the standardized Sussex Market Area mapping for both 2005, 2006 and by % change 2006 over 2005. This mapping shows the major thoroughfares which facilitates the flow of traffic in and about the Sussex market.

The second traffic data section is the ADI Ltd. data provided by the Municipality to Drummond Consulting for insertion into this data package. This data shows specific traffic patterns at the key intersections within the Town of Sussex. These traffic counts are represented by AWDT-Average Weekday Daily Traffic.

The Provincial DOT data provides Annual Average Daily Traffic (AADT) counts on all major routes leading into and out of Sussex. This data is critical, traffic drives retail. Positive trending in this element will generate great excitement within the retail community. As at the time of this report the DOT data for 2007 is 9 months away. There are exciting changes in 2006 traffic over 2005 however it is believed the 2007 over 2006 data will be even more encouraging. Significant retail developments such as Wal-Mart, Sobeys, Superstore, Shoppers Drug Mart and the new NBLCC outlet should create new traffic counts which will prompt retailers not currently doing business in the area to consider the opportunity. It is anticipated the trends occurring in the DOT regional traffic counts will be supported by the year over year Sussex proper traffic counts performed by ADI Ltd.

Media Contact Information Provincial and Sussex Local

Two data compilations are presented; one which provides media contact information both for the Sussex local market as well as Provincial market. Many local retailers will utilize the local media contact as their one stop shop for any desired advertising medium As Sussex grows and emerges as a retail area the Provincial data will prove useful. Many retailers will consider Sussex as their second, third or fourth location and as such may require the broader mediums to speak to its customer base. This list is exhaustive and comprehensive.

The data compiled as per the Proposal Call is strategic; first the composition and characteristics of the Sussex Market area is established by Town, Village and Parish. The Sussex market area is further dissected by the Canada Post information providing additional information about 10 Forward Sortation Areas, population counts and dwelling details. Traffic flows are presented providing a look into how the market interacts with and about Sussex. Finally the marketing information is made available which allow retailers to reach out to prospective customers. This foundation of data will be a substantial aid to existing retailers who would like to market to its customers or to retailers making the determination if the Sussex market holds something for them.