Chukuni Communities Development Corporation

Municipality of Red Lake
Business Gap Analysis

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GLOSSARY AND ABBREVIATIONS

Term	Details
BGA	Business Gap Analysis
CCS	Community Capacity Study
CCDC	Chukuni Communities Development Corporation
Contractor services	Includes spending on repairs and maintenance to owned or rented residences.
Ear Falls	The Township of Ear Falls
FN	First Nations. This abbreviation is used in tables and figures and is not used in text.
Food from stores and convenience purchases	Includes spending on food purchased from stores, including liquor, games of chance (e.g., lottery), and smoking products.
Furnishings and equipment	Includes spending on household furnishings, household equipment (i.e., household appliances and home and workshop tools and equipment), and related maintenance, repairs, and services.
Household supplies and operations services	Includes spending on household cleaning services, pet expenses, cleaning supplies and equipment, paper, plastic, and foil supplies, garden supplies, childcare expenses, and communications (i.e., landline, cell phone, and internet services).
Kenora CD	A Census Division is the general term for a geographic area between the province/territory level and the municipality level. Throughout the report the Kenora District Census Division is referred to as the Kenora CD.
Personal care products	Includes spending on hair, makeup, deodorant, and other hygiene products.
Personal services and pharmaceuticals	Includes spending on financial and legal services, prescribed medicine and pharmaceutical products.
Recreation services	Includes spending on entertainment (e.g., movies, sporting events, admission fees, online streaming services), and use of recreation facilities.
Recreation supplies and entertainment equipment	Includes spending on children’s toys, video game systems and equipment, arts and crafts materials, athletic equipment, computer equipment and supplies, photographic goods and services, camping and BBQ equipment and accessories, and home entertainment equipment and services.
Sq. ft.	Square Foot
The Municipality	The Municipality of Red Lake
Vehicle purchases and related expenses	Includes spending on motor and recreation vehicles (including bicycles), parts, fuel, maintenance, and other related expenses for the operation of privately owned or leased vehicles.

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LAND ACKNOWLEDGEMENT

We, the Municipality of Red Lake, acknowledge that our foundation and the spaces in which we live and maintain are on the lands of the Anishinaapek of Red Lake; the traditional lands of Lac Seul and Wabauskang First Nations, and Treaty 3 territory. As we are all Treaty people, we will continue to cherish the reciprocity of all the relationships on these scared Lands and Waters.

EXECUTIVE SUMMARY

The Municipality of Red Lake (the Municipality) serves as a retail and service hub to more than 13,800 people, including the Municipality, Township of Ear Falls (Ear Falls), nearby First Nations, and surrounding unorganized territories (collectively the Red Lake trade area). The Municipality itself has a population of approximately 4,100 across the communities of Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen. The Municipality has a long-standing economic foundation in the natural resource sector, with mining, forestry, and tourism playing important roles. With several major existing and expected developments on the horizon—including Evolution Mining operations, West Red Lake Gold's Madsen Mine redevelopment, Kinross Gold's Great Bear Project, the Frontier Lithium PAK Project (located over 175 km north), and the Berens River Bridge and Roads Project, which will improve the road connection to seven First Nations north of Red Lake—the Municipality is poised for population, labour, and economic growth.

To support economic resilience and sustainable growth, the Municipality and Chukuni Communities Development Corporation (CCDC) commissioned a Business Gap Analysis (BGA) study. This report summarizes the findings of the BGA, which analyzes the demographics, assesses the current retail-commercial business supply, forecasts future retail-commercial demand for the Red Lake trade area, as well as identifies opportunities and recommendations to strengthen the Municipality's role as a retail and service hub.

Demographic Analysis Findings

The demographic findings highlight that, as of 2024, Red Lake (4,100 people) accounts for 30% of the trade area population. Pikangikum First Nation (3,690 people) and Sandy Lake First Nation (2,260 people) follow closely behind. The peak population and labour force growth as a result of the referenced mining and bridge and road developments is expected by 2037. By 2037 the population of the Municipality could peak at approximately 5,680 people (or an increase of 1,580 people). Demographic trends also suggest the need for services tailored to seniors. A rising number of seniors will require expanded support services to age in place, including home care, wellness, and mobile service offerings.

Supply Analysis Findings

The supply analysis findings reveal opportunities for business development in Red Lake and confirm the need to diversify the economy beyond the mining sector. The Municipality is projected to see large increases in household spending over the next decade due to growing demand for goods and services from within the community, surrounding First Nations, tourism and local mining activity—creating strong opportunities for commercial growth. With the anticipated demand, retail-commercial expenditures are expected to grow from $120 million in 2024 to $253 million in 2037. Despite this projected growth, several businesses are struggling to meet current demand. Notable supply gaps were identified in accommodations, food and catering services, retail goods, recreation, and contractor services. These challenges are compounded by staffing limitations (e.g., labour shortages and labour retention challenges) and limited-service variety which could constrain future growth. Strengthening the business environment in these sectors will be critical to meeting the needs of both residents and visitors as the Municipality plans for growth.

Demand Analysis Findings

The demand analysis findings illustrate the increasing importance of non-local spending in the local economy. Non-local resident expenditures are forecasted to rise from $13.5 million in 2024 to $21.2 million by 2037. In total, across local and non-local spending, the Municipality's annual market share could grow from $182 million in 2024 to $209 million by 2037, supported by population growth, improved regional connectivity, and improved service offerings.

The Municipality will require new retail floor space to meet this demand, especially in accommodations, restaurants, clothing, as well as furniture and home appliances. Floor space requirements for these categories are forecasted to increase from 105,000 square feet in 2024 to nearly 198,000 square feet by 2037. The findings support the need for at least one additional accommodation provider, restaurant, clothing store, and furniture retailer to meet the growing demand in the short term.

Recommendations

In response to the findings, a series of strategic recommendations were developed to meet anticipated demand, support community and commercial growth, and guide future investment. The Business Gap Analysis provides a clear roadmap to guide the Municipality through its next phase of growth. With targeted implementation of these recommendations, the Municipality will be better positioned to strengthen its role as a retail and service hub, enhance the quality of life for its residents, and build a more inclusive and resilient local economy. The recommendations are organized by priority.

High priority actions to be implemented within the next five years include:

- Facilitating accommodation expansion;
- Expanding food service offerings;
- Attracting a furniture and home appliance retailer;
- Attracting a clothing retailer;
- Supporting foreign worker attraction and retention programs (e.g., through the Ontario Immigrant Nominee Program); and
- Addressing skilled trades gaps.

Medium-term priorities, targeted for the next six to ten years, include:

- Advocating for enhanced access and labour mobility from northern First Nations communities;
- Deepening regional partnerships with Indigenous communities to support shared workforce and economic development goals; and
- Updating the Tourism Marketing Strategy.

Longer-term priorities, to be pursued over a ten-year and beyond horizon, include:

- Supports to businesses offering services for seniors; and
- Enhancing community beautification initiatives.

1.0 INTRODUCTION

The Municipality of Red Lake (the Municipality) is a regional hub that provides retail and services for a trade area that includes the Municipality, nearby communities, Indigenous communities, and unorganized territories. With a Municipal population of approximately 4,100 encompassing the communities of Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen, and a broader retail trade area population of over 13,800, the Municipality plays an important role in meeting the commercial and service needs of the region. This Business Gap Analysis assesses how the existing supply of businesses aligns with current and anticipated demand and identifies opportunities to strengthen the Municipality's role as a retail and service hub in light of current and planned developments.

A series of current and planned developments are expected to generate employment and population growth and increase regional connectivity. These include Evolution Mining's operations in Balmertown, West Red Lake Gold's redevelopment of the Madsen Mine near Madsen, Kinross Gold's Great Bear Project located between the Municipality and the Township of Ear Falls (Ear Falls), and the Berens River Bridge and Roads Project near Pikangikum First Nation. Red Lake is also anticipated to serve as the primary access point and service hub for the PAK Lithium Project, located more than 175 km north of Red Lake. These developments are expected to increase demand for goods and services across multiple sectors, including accommodations, food, retail, and contractor support, presenting both opportunities and pressures for the local business community.

In response to the anticipated growth, the Chukuni Communities Development Corporation (CCDC) and the Municipality commissioned two complementary studies: a Business Gap Analysis (BGA) and a Community Capacity Study (CCS). Together, these studies provide a coordinated foundation for business, retail, and economic development, long-term municipal planning, and infrastructure investment. The following report describes the BGA.

1.1 BUSINESS GAP ANALYSIS CONTEXT AND OBJECTIVES

The BGA was undertaken to inform strategies for business development and investment attraction in response to anticipated population growth associated with mining, road development, and broader regional changes. The assessment was guided by an analysis of local and regional demographic trends, retail-commercial supply and demand, and community input gathered through a business survey, stakeholder interviews, and public engagement. The analysis identified priority business types and target areas for the Municipality to strengthen its role as a regional service hub amid anticipated growth.

Particular emphasis has been placed on understanding the potential impacts of peak construction periods and long-term operational employment from the current and anticipated mining projects resulting in in-migration and population growth in the Municipality. Emphasis has also been placed on the Municipality's evolving role as a key access point for northern First Nations due to the Berens River Bridge and Roads Project, which will provide Pikangikum First Nation with year-round road access to the Municipality and improved winter road access for six additional First Nations to the Municipality. The BGA is intended to serve as a long-term planning framework to help identify and prioritize the types of businesses that have the most market potential or where current demand is not being met. This is to support the sustainable growth of the economy as the Municipality expands.

The BGA report includes a demographic analysis; supply analysis, a demand analysis, identifying priority business types, and recommendations:

Demographic analysis: The demographic analysis established a comprehensive understanding of the current population and demographics of the Red Lake trade area, as well as forecasted changes to population in the Municipality. It also examined the implications of these changes to the future supply and demand of retail-commercial goods and services within the Municipality.

Supply analysis: The supply analysis included a review of the current labour force by industry sectors, business inventory, and household spending characteristics for each of the Red Lake trade area communities. The supply analysis provides a current understanding of economic activity and businesses operating within the Municipality and trade area communities. This was to support the identification of potential gaps in the supply of retail-commercial goods and services within the Municipality.

Demand analysis: Building on the supply analysis, this phase projected the current and future demand for retail-commercial goods and services in the Municipality. The demand analysis established baseline and projected retail-commercial economic activity within the Municipality and explored strategies for prioritizing the growth of existing businesses or attracting new businesses to the Municipality. The work also included stakeholder engagement, a business survey, and stakeholder interviews. These were done to incorporate local insights into the types of businesses that are not meeting current demand or have the highest market potential.

Recommendations: The findings from the supply and demand analysis provided the foundation for the recommendations. The aim was to support the Municipality in managing and planning for growth, guiding future support and investment, as well as enabling the expansion of businesses and the economy.

1.1.1 Community Capacity Study

The CCS complements the BGA by evaluating the Municipality’s projected population growth, housing demand, and infrastructure and land development needs to support economic development. It examined how growth in population, infrastructure, and services—driven by the mining and bridge and road developments—may affect the Municipality’s ability to respond proactively and ensure the community is prepared for growth.

The CCS focused on evaluating the capacity and condition of infrastructure and services such as land-based needs, water and wastewater infrastructure, housing, recreation, education, emergency response, and health care, among others. The BGA used key assumptions and context developed in the CCS including population projections, housing demand, and infrastructure and land needs. This information was used to identify alignment and gaps between existing market offerings and projected demand across the region. It also informed strategies for business attraction and development.

1.2 APPROACH

1.2.1 Spatial Boundaries

The BGA is focused on the Municipality of Red Lake, along with an assessment of the broader Red Lake trade area to better understand the demographics, household expenditures, and prominent businesses that influence economic activity in the Municipality. The demand gap analysis specifically examined consumer spending within the Municipality.

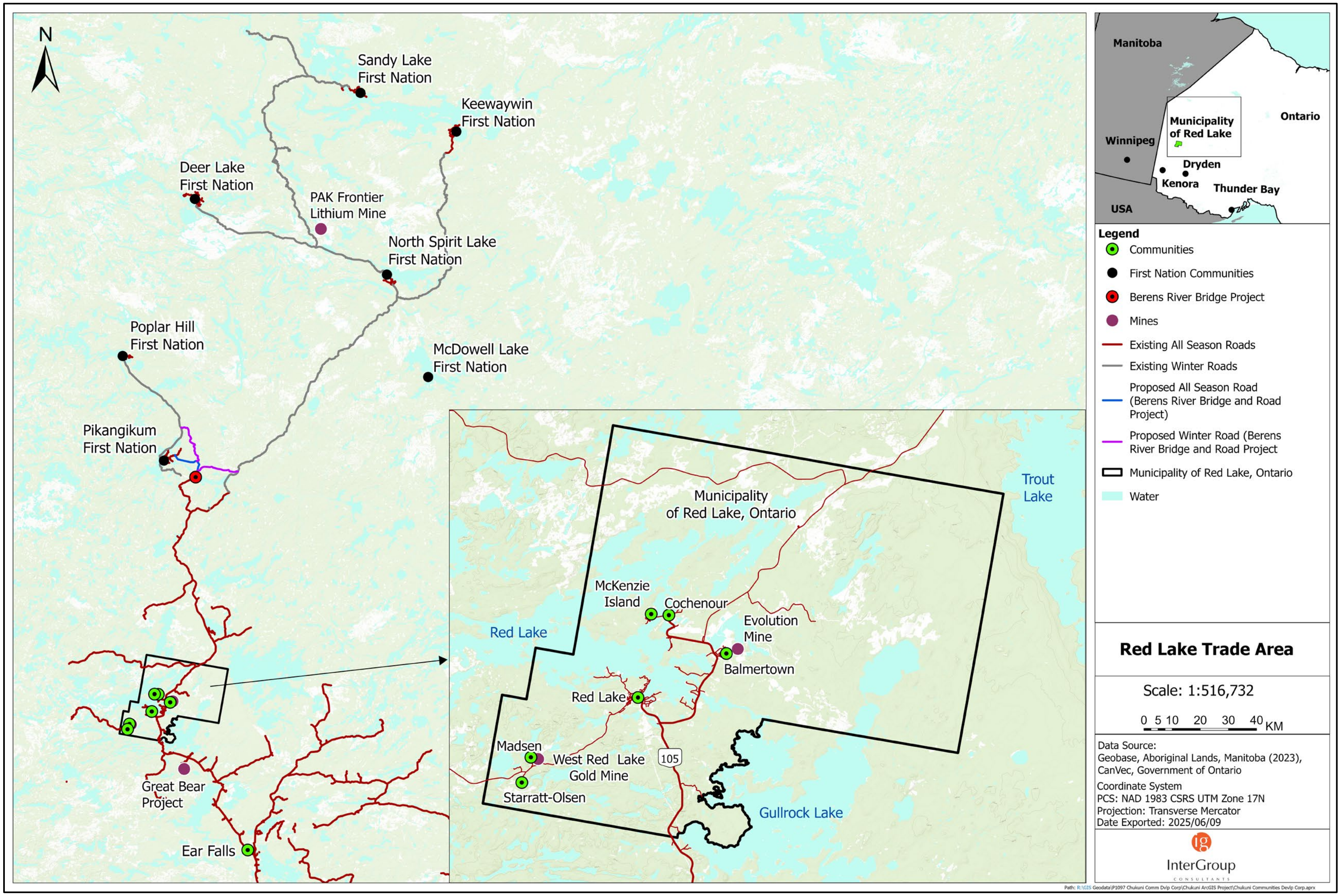
A broader review of the trade area revealed that communities south of the Municipality of Red Lake rely on Kenora, Dryden, Thunder Bay, and Winnipeg as their retail and service hubs. As a result, the defined Red Lake trade area focused on the Municipality of Red Lake, Ear Falls, and the First Nation communities located to the north of the Municipality.

The spatial boundaries for this analysis were defined as follows:

- **The Municipality of Red Lake**, including Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen; and
- **The Red Lake trade area**, including Ear Falls, Pikangikum First Nation, Deer Lake First Nation, Keewaywin First Nation, McDowell Lake First Nation, North Spirit First Nation, Poplar Hill First Nation, and Sandy Lake First Nation.

Figure 1.2-1 presents a map of the Red Lake trade area, highlighting each of the trade area communities as well as the existing and upcoming mining developments and Berens River Bridge and Roads Project.

Figure 1.2-1: Red Lake Trade Area Communities



1.2.2 Temporal Boundaries

The BGA is based on currently available data (as of July 2025) and is intended to provide context for the anticipated effects of spending within the Municipality of Red Lake resulting from the projected population and economic growth. The temporal boundaries for the study were limited by the availability and continuity of the data. For example, the demographic analysis is based on the 2021 Census and inclusive of 2024 inter-Census estimates for comparison. Trend analysis (2011 and 2016) is provided for comparison and context as needed. However, there are instances where temporal boundaries were restricted to current use (as of July 2025), such as for business inventories.

The temporal scope of the analysis included forward looking projections for a 20-year period from 2025 to 2045. Future household retail-commercial expenditures were forecasted for each of the Red Lake trade area communities. Expenditures were also forecasted for 2037 as this aligns with the expected employment peak for the planned mining and road development projects, and with the population and employment projections prepared as part of the CCS.

1.2.3 Data Collection

The characterization of the current business environment relied on both primary and secondary data sources.

Secondary Data Collection

Secondary data collection involved a review of relevant reports and literature, websites, and databases. The review of literature and databases included the following sources:

- Statistical data sources, for example, Statistics Canada Census of Population and Environics (including 2024 inter-Census and household spending data).
- Federal, provincial, and municipal government reports and data.
- Regional reports, including community profiles, business gap analysis studies, strategic plans, and official plans.
- Publicly available reports and profiles.
- Online sources, such as community websites.

Secondary Data Limitations

Secondary data collection used information from publicly available sources to incorporate the best knowledge at the time of writing. Some studies and secondary sources may be out of date and are subjective to who wrote and published the source material.

Statistics Canada

Statistics Canada separately enumerates the Municipality of Red Lake, Ear Falls, Deer Lake First Nation, Keewaywin First Nation, North Spirit First Nation, Poplar Hill First Nation, and Sandy Lake First Nation. Statistics Canada enumerates the Municipality of Red Lake as a whole but does not provide separate data for each of its individual communities: Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen. Pikangikum First Nation is not enumerated due to data quality issues, and McDowell Lake First Nation was excluded due to its small population and the need to protect confidentiality.

As such, trade area indicators from Statistics Canada typically exclude Pikangikum and McDowell Lake First Nations. Statistics Canada Census of Population data should be interpreted with caution because of issues of comparability across years, confidentiality, data quality, and response error. Limitations relative to specific indicators are provided as notes to tables and figures.

The Census of Population suppresses data for confidentiality or data quality. Data suppression for confidentiality reasons is meant to prevent the disclosure of data that could be used to identify individuals, particularly in small communities like McDowell Lake First Nation. Data suppression due to data quality is done for a variety of reasons, including incompletely enumerated communities (such as Pikangikum First Nation). The Census of Population also relies on a random rounding procedure, where actual values are randomly rounded up or down to the nearest integer of five or ten to enhance confidentiality. This can impact very small populations but is not believed to have a material impact on the analysis in this report.

Some concerns were raised by community members about the accuracy of certain data reported by Statistics Canada. For example, participants felt that the reported unemployment rates in the Municipality of Red Lake may be higher than the actual rates, and that population counts in rural and Indigenous communities may be underreported. However, these concerns are not expected to have impacted the analysis presented in this report. Statistics Canada Census data continues to represent the most reliable and comprehensive dataset currently available.

Business Inventory

A retail-commercial business inventory was developed for the communities within the Red Lake trade area. This inventory was compiled using publicly available information from community websites, as well as the CCDC business inventory for the Municipalities of Red Lake and Ear Falls. The inventory was completed in March 2025 and may not reflect recent changes or the full range of retail-commercial businesses currently operating in each community. Businesses not publicly listed or reported were also not captured in the inventory.

Environics Inter-census and Household Spending Data

Inter-census data was purchased from Environics which uses a variety of data sources, including historical Census data, current economic indicators, post-census estimates from federal and provincial governments, and economic data such as building permits to forecast demographic information as of July 1, 2024 (Environics 2025a). The modelling process fills in missing data where Statistics Canada has supressed information and adjusts for random rounding.

Household spending data was also purchased which projects the annual expenditures by households for various spending categories. The data produced uses information from Statistics Canada Survey of Household Spending and other datasets produced by Environics and is developed to align with totals from the Canadian System of National Accounts and Statistics Canada (Environics 2025b).

In cases where data is not publicly reported—such as for Pikangikum First Nation—estimates are likely to have a larger margin of error due to limited available source data. Data was not available for McDowell Lake First Nation due to the small population size and limited source data.

Primary Data Collection

Primary data was used to support the inclusion of community knowledge and local perspectives, confirm the reasonableness and relevance of secondary information, and qualitatively fill gaps in the literature review. Primary data collection was undertaken through a business survey (26 participants), an interview program (10 participants), and stakeholder engagement targeted at the business community and through an open house (37+ participants).

Between 2024 and 2025 a business survey, interview program, and stakeholder engagement sessions were implemented to support the BGA, and referenced herein as:

- Business Survey. 2025. Business Gap Analysis – Business Survey.
- Stakeholder Engagement. 2025. Business Gap Analysis and Community Capacity Study Targeted Engagement Sessions and Public Open House. June 17, 2025.
- Stakeholder Interview Program. 2025. Business Gap Analysis and Community Capacity Study Interview Program.

The CCS and BGA Targeted Stakeholder Engagement Sessions and Public Open House took place on June 17, 2025, at the Red Lake Regional Heritage Centre in Red Lake, Ontario. Targeted engagement sessions and the Public Open House were used to confirm, test, and validate the analysis and preliminary findings associated with the studies. There were 12 participants at the targeted session for the CCS and 12 participants at the targeted session for the BGA, in addition to at least 25 people who attended the open house. People were also invited to complete a short five-question survey to share any feedback or offer local perspectives on the stakeholder engagement events. A total of **two** responses were received for the CCS session, **five** at the BGA session, and **seven** responses at the open house. The surveys remained open for over a week (until June 27, 2025) to allow sufficient time for community members to participate.

Limitations to Primary Data Collection

Limitations of the stakeholder engagement and surveys include that the information reflects the lived experiences and perspectives of the participants. This information could not always be validated through triangulation of data sources but is still considered as valid and an important contribution to local perspectives. An informed consent process was used with all participants, and the option to not respond to a question or redact sensitive information was offered.

Additional limitations include:

- The business survey was a small sample of the businesses operating in the Municipality of Red Lake and may not have fully represented the perspectives of the broader business community. Similarly, responses for the engagement surveys represent a small sample of community interests in the Municipality of Red Lake.

- Feedback gathered during stakeholder engagement was influenced by the willingness of participants to share their perspectives. As a result, the input may reflect the views of individuals or groups who are more vocal or actively engaged, rather than being fully representative of the broader community. Additionally, some stakeholders may have chosen to withhold feedback or limit their participation, which could lead to gaps or biases in the insights collected.
- Interviews were used to identify priority businesses, which could have been suggested due to personal bias, may have overlooked other potential business types, and be limited by the diversity of people interviewed.

1.2.4 Retail Supply and Demand Modelling Assumptions

The supply and demand analysis projected total household expenditures by the Red Lake trade area communities and spending in the Municipality of Red Lake in 2037, based on the potential population growth scenario outlined in the **Community Capacity Study**. The analysis assumed that current market shares and sales productivity levels are maintained over time.

Approach to Retail Supply Projections

Future household retail-commercial expenditures were forecasted for each of the Red Lake trade area communities. Expenditures were forecasted for 2037 as this aligns with when employment for the planned mining and road development projects is expected to peak, and with the population and employment projections prepared as part of the CCS. The steps for forecasting retail-commercial expenditures were completed by calculating:

1. The **2037 average household income** by applying the average annual growth rate of average household income from 2015 to 2024 to the 2024 average household income.[1,2]
2. The **forecasted number of households in 2037** by taking the average annual growth rate of households from 2016 to 2024 for the Kenora District Census Division (Kenora CD) and applying it to the 2024 number of households in each community.
    a. For the Municipality as a whole, household projections were completed as part of the land-based projections for the CCS. The potential growth scenario projected an increase from 1,705 households in 2021 to 2,589 households in 2037.[3] The projected growth scenario was chosen as this corresponds to the upper bound of demand for goods and services.
3. The **forecasted 2037 household total income** were determined by multiplying the projected number of households and the average household income for each community.

[1] For North Spirit First Nation, the average annual growth rate of household income from 2010 to 2024 was used, as household income was reported much higher in 2015 and would result in a material decrease in household income over the projection period.
[2] Census data was not available for Pikangikum First Nation from 2011 to 2021. To calculate the forecasted 2037 average household income in Pikangikum First Nation, the average annual growth rate for the Kenora CD (3.1%) was used.
[3] Additional information on the population projections, including the baseline scenario and the potential growth scenario, is provided in **Appendix A** and in the **Community Capacity Study**.

4. The **2037 total expenditures by community** were estimated by using the ratio of total household income relative to total expenditures in 2024. To calculate the forecasted expenditures by retail-commercial categories the average annual growth rate of total expenditures from 2024 to 2037 was applied to each of the spending categories.

Approach to Retail Demand Projections

The demand analysis was completed to ascertain more precisely the need for specific retail-commercial product or service offerings within the Municipality. To accomplish this, assumptions were developed for the Municipality's achievable market shares through the analysis of total household expenditures by the Red Lake trade area, similar studies completed for comparable Municipalities, and the Municipality's business inventory. This analysis was supported by local perspectives and through professional judgement.

Estimates of non-local spending were developed using a conservative approach to avoid overstating its impact on the Municipality's economy. These estimates were compared with those used in other studies to ensure consistency.

Specifically, estimates were based on the assumptions that, of the approximately 200[4] available rooms at accommodations in the Municipality of Red Lake, 75%[5] were occupied. This translates to roughly 100 non-local occupants regularly staying in temporary accommodation and making purchases in the Municipality.

Based on these assumptions, non-local spending on accommodations was estimated to be equivalent to 80% of total spending on accommodations by the Red Lake trade area in 2024, decreasing to 50% by 2037. This projected decline reflects the fixed number of accommodations and a consistently high occupancy rate, both of which limit future growth in demand. These estimates are aligned with average room rates of $200 in 2024 and $260 in 2037, based on an annual increase of approximately 2%.

It was also assumed that non-local spending on contractor services, personal services and pharmaceuticals would primarily come from individuals living outside the defined trade area, who access services in the Municipality.

To estimate e-commerce spending by retail category for residents of the Municipality, assumptions were made based on the availability of goods or services. A multiplier was applied to the national average (6.1%) to reflect local availability. The following assumptions were made on the proportion of e-commerce spending by residents of the Municipality:

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[4] The estimated total of 200 short-term accommodations includes 45 rooms at the Balmer Hotel, 46 rooms at Nature's Inn, 19 rooms at Howey Bay, 65 rooms at Super 8, and 25 rooms at the Paddle Inn Bed & Breakfast (Balmer Hotel n.d.; Nature's Inn n.d.; Reservation Desk n.d.a.; Reservation Desk n.d.b.). These estimates were based on available information from online sources, however, the exact number of rooms at the Paddle Inn Bed and Breakfast were not specified. The 25-room estimate is based on available information and may not be accurate.

[5] A 75% occupancy rate is above the 2022 Northern Ontario average of 65%; however, stakeholders reported occupancy rates as high as 80%, with rooms often unavailable during peak periods (Government of Ontario 2025; Stakeholder Interview Program 2025).

- No e-commerce purchases of goods or services for contractor services, accommodations, or food as these services are purchased in person.
- A multiplier of 1 (or 6.1%) of spending on personal care products and household supplies as these are typically purchased at a store front.
- A multiplier of 2 (or 12.2%) for clothing or recreation supplies and entertainment equipment, as people purchase these items at a store front but may occasionally order on-line.
- A multiplier of 3 (or 18.3%) for furnishings and equipment, vehicle purchases or related expenses, reading and other printed materials, personal services or pharmaceuticals, and recreation services. Most of these products or services have limited availability in the Municipality and are likely to be purchased on-line or out of the Municipality.

The potential new retail floor area was estimated using the projected potential demand outlined in **Section 4.1.4** for target business types identified by both locals and stakeholders. Potential new retail floor area was estimated for illustrative purposes to support the attraction of investments to existing land parcels. The demand for retail floor area was calculated using the average price per square foot ($/sq. ft.) by business type. It was assumed that the average $/sq. ft. by business type for clothing and furniture and home appliance stores was equal to 50% of the results from the 2018 Centre for Study of Commercial Activity top 100 retailers in Canada (CSCA 2019). The average $/sq. ft. for accommodations and restaurants was calculated using the existing retail floor space area and demand in the Municipality in 2024. It was also assumed that for accommodations, the $/sq. ft. was 40% higher than estimated. These assumptions were developed based on the analysis of comparable studies completed for similar municipalities and professional judgement.

Retail Supply and Demand Modelling Limitations

The projected total household expenditures and retail-commercial spending within the Municipality in 2037 were based on the potential population growth scenario for the Municipality. Additional information on the population projections, including approach, methods, and limitations, are provided in **Appendix A** and in the **Community Capacity Study**. A population projection is a forecast of potential future population growth, it is not an accurate prediction, but rather a series of estimates that provide context for understanding how communities may change over time.

Projections for other communities were completed based on the observed historical growth rate in the Kenora CD. To reach the forecasted aggregate Red Lake trade area total household expenditures and retail-commercial spending, the assumed household and income growth must be met. Inflation was assumed to be reflected in household income growth, with no change in the proportion of expenditures across spending categories. This implies that household income growth will keep pace with inflation and that spending patterns will remain stable. If this assumption does not hold, then consumers may shift more of their disposable income toward essential goods (e.g., shelter, food, transportation), leaving a smaller share for retail goods and services and other discretionary goods or services.

Retail-commercial spending projections for the Municipality were developed by estimating the achievable market shares based on total household expenditures across the Red Lake trade area. This was informed by comparable studies completed for other Municipalities, the trade area business inventories, and local perspectives gathered through a business survey, stakeholder interviews, community engagement, and through professional judgement. These projections rely on available data and assumptions, as such any deviation in actual spending within the trade area could lead to an over- or under-estimation of retail-commercial demand in the Municipality.

For the analysis of First Nation's spending, projections were aggregated. This assumption placed greater weight on larger communities such as Pikangikum First Nation and Sandy Lake First Nation to reach the estimated spending levels.

The potential new retail floor area was estimated using the projected potential demand for target business types identified by both locals and stakeholders. Any deviation in actual spending within the trade area could lead to an over or under estimation of retail floor space demand. See **Section 1.2.4.2** for new retail floor area assumptions. The assumptions include that the average $/sq. ft. remains constant over the projection period.

2.0 DEMOGRAPHIC ANALYSIS

Describing the demographics of the communities in the Red Lake trade area are key to understanding the community characteristics and how population and employment growth because of mining and road development projects can drive changes to aspects of community life. Understanding the current community characteristics supports the identification of demand for investments in target retail and commercial businesses.

This section provides an overview of demographics to support the characterization of the retail trade area including:

- Total population;
- Registered Indigenous population on-reserve;
- Indigenous population;
- Age distribution and median age;
- Occupied dwellings by structural types;
- Tenure status;
- Household types (e.g., one person households, census couples);
- Labour force characteristics;
- Educational attainment;
- Household and personal income; and
- Household spending patterns.

2.1 POPULATION AND HOUSEHOLDS

Understanding population and household characteristics helps support the identification of groups of the population that may demand specific goods or services or are currently underserved. Population and household characteristics across the Red Lake trade area reveal important trends for businesses and service providers. While the populations of the Municipality of Red Lake and the Township of Ear Falls have remained stable or declined slightly, the surrounding First Nation communities have experienced growth, driven by a younger population and larger households.

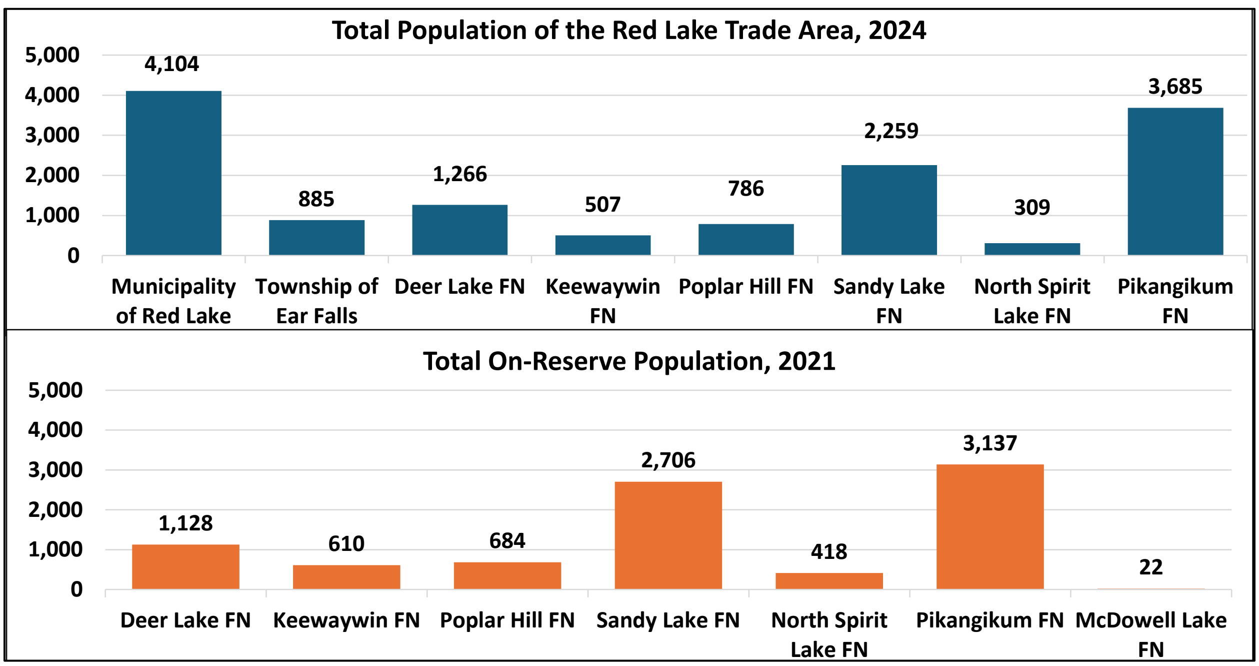
Most dwellings in the Red Lake trade area are single-detached homes, and household types vary widely—from a high proportion of single-person households in the Municipality to large family households in First Nation communities. These demographic differences directly affect local demand for retail, housing, recreation, and service offerings—pointing to opportunities for tailored investments that reflect the distinct needs of youth, seniors, homeowners, and growing Indigenous families across the region.

Population and household demographics summarized in this section include total population, registered Indigenous population on-reserve, Indigenous population, age distribution and median age, occupied dwellings by structural types, tenure status, and household types (e.g., one person households, census couples).

In 2024, the population of the Red Lake trade area was forecasted to be 13,801. The Municipality of Red Lake (4,104 people) accounted for 30% of the trade area population, followed by Pikangikum First Nation at 27% (3,685 people) and Sandy Lake First Nation at 16% (2,259 people). The population in the Municipality of Red Lake and Ear Falls has declined since 2011, while the population in the First Nation communities within the trade area has increased (Statistics Canada 2012, 2023; Environics 2024). The median age in the Red Lake trade area is lower than the provincial average, with the First Nation communities having a notably younger population (Statistics Canada 2023; Environics 2024).

Figure 2.1-1 shows the total population of the Red Lake trade area for 2024 and the on-reserve population for 2021. The Red Lake trade area population was forecasted to be 13,800 people in 2024 (Environics 2024). The on-reserve population was highest in Pikangikum First Nation, followed by Sandy Lake First Nation and Deer Lake First Nation. McDowell Lake First Nation had the smallest on-reserve population at about 20 people (ISC 2022).

Figure 2.1-1: Red Lake Trade Area Total Population, 2024, and On-Reserve Population, 2021



Source: ISC 2022; Environics 2024.

Notes:

1. Total population data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In 2021, the population in the Municipality of Red Lake was 4,094. From 2011 to 2024, the population decreased slightly from 4,366 in 2011 to a projected population of 4,104 in 2024 (or an average annual decrease of 0.5%). Similarly, Ear Falls experienced a population decline from 1,026 in 2011 to 885 in 2024 (or an average annual decrease of 1.1%). In contrast, the First Nations communities in the Red Lake trade area experienced steady and, in some cases, rapid population growth over the same time period (Environics 2024; Statistics Canada 2012, 2023). Poplar Hill First Nation had the highest average annual growth rate (6.6%), followed by Deer Lake First Nation (4.0%) and Keewaywin First Nation (3.1%). All three First Nations population growth rates exceeded the growth rates of the Kenora CD (2.0%) and Ontario (1.6%) (Statistics Canada 2013, 2017, 2023; Environics 2024). The younger populations in the First Nation communities present an opportunity to strengthen the labour force both within each community and across the Red Lake trade area.

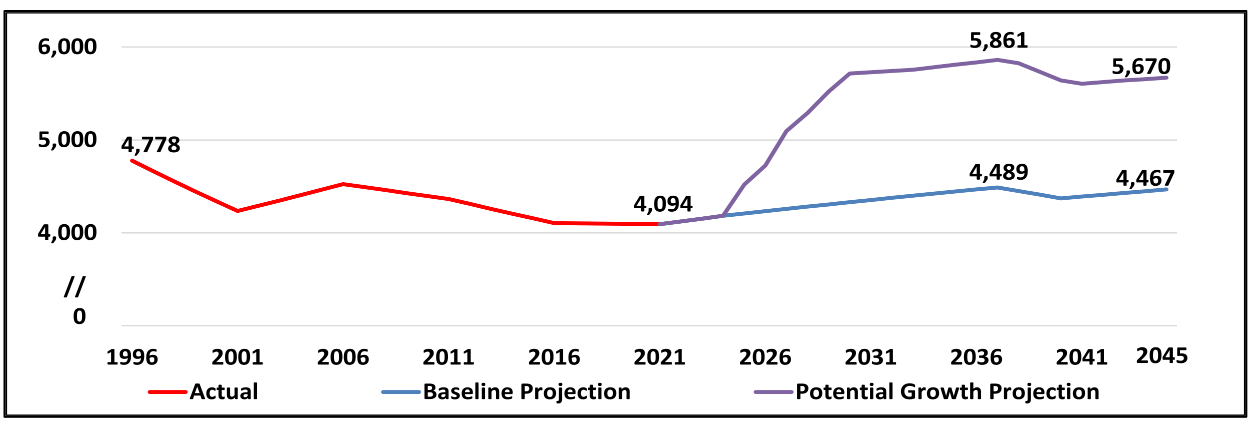
In 2021, the total on-reserve population was 8,705 among the seven First Nation communities, ranging between 22 people in McDowell Lake First Nation and 3,137 people in Pikangikum First Nation (ISC 2022). By 2024, the population of the Red Lake trade area was forecasted to be 13,801, with the Municipality accounting for 30% of the trade area population, followed by Pikangikum First Nation at 27% (3,685 people) and Sandy Lake First Nation at 16% (2,259 people). The Red Lake trade area represented 18% of the total population of the Kenora CD (population of 74,634 in 2024) (Environics 2024).

About 19% of the population in the Municipalities of Red Lake and Ear Falls identify as Indigenous compared to around 100% in the First Nation communities in 2024. The proportion of the population that identifies as Indigenous is much higher across the Red Lake trade area compared to the Ontario average (2.9%). This reinforces the importance of understanding the trade area's unique demographic profile.

As part of the CCS, two population projections scenarios were prepared for the Municipality of Red Lake.

Figure 2.1-2 shows the results for the baseline and potential growth projection from 2022 to 2045 and the historical population for the Municipality of Red Lake from 1996 to 2021. The population decreased from 4,778 in 1996 to 4,094 in 2021 (or by 684 people at an average annual rate of change of -0.62%) (Statistics Canada 2002, 2023a) and is projected to increase to between 4,467 to 5,670 people by 2045.

Figure 2.1-2: Municipality of Red Lake Population Projections, 2022 to 2045



Sources: Ontario Ministry of Finance 2024; Statistics Canada 2002, 2007, 2012, 2017, 2023a, 2024.

Notes:

1. Projections for the Municipality of Red Lake were prepared by InterGroup Consultants Ltd.
2. Additional information on the population projections is provided in **Appendix A** and in the **Community Capacity Study**.

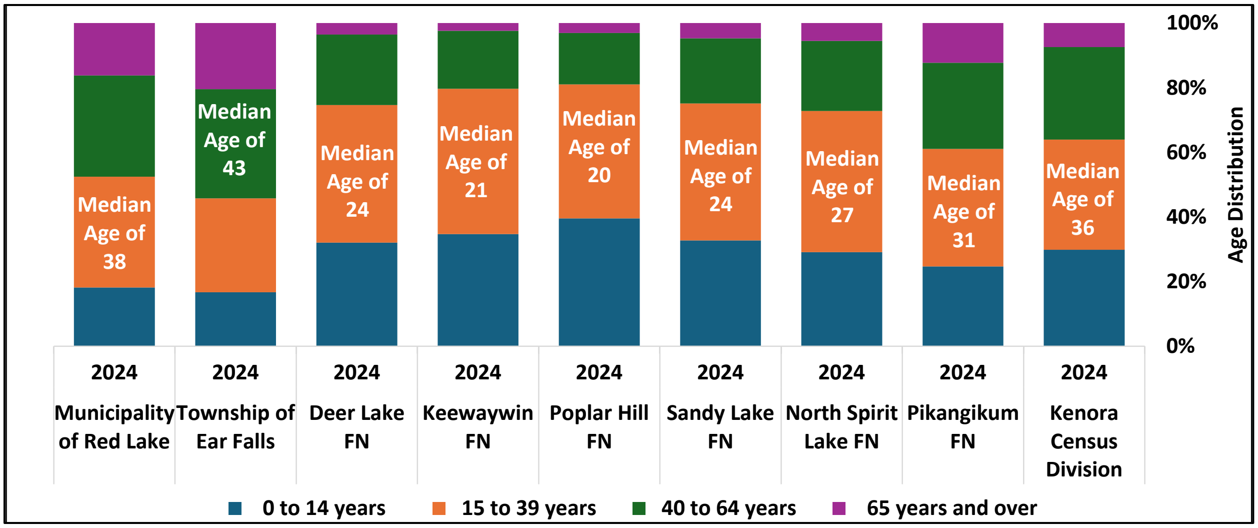
The baseline population projection scenario includes existing mining and road development projects (i.e., Evolution Mine), and the potential growth population projection scenario includes the referenced existing as well as planned mining and road development projects (i.e., Evolution Mine, West Red Lake Gold, Great Bear Project, PAK Lithium Project, and the Berens River Bridge and Roads Project). These developments are located within or near the Municipality, and rely on it for transportation access and services, and are anticipated to increase local employment and in-migration.

The baseline scenario projected an increase in the population from 4,094 in 2021 to 4,467 by 2045 and the potential growth scenario projected an increase to 5,670 by 2045. For the potential growth projection, given the closure of some of the referenced mining projects between 2037 to 2041, the population was projected to peak at about 5,860 people around the year 2037. For this reason, the supply and demand analysis completed in this report focused on 2037 as this is when population, employment, and household spending are expected to peak over the projection period.

These population trends have clear implications for the Municipality's retail and service sector. Red Lake's stable population, combined with rapid growth in nearby First Nation communities, underscores its role as a regional service hub. The increasing trade area population, particularly the large and growing Indigenous population, presents an important opportunity to tailor business offerings to emerging demand—whether through product mix, service delivery, or cultural relevance. Targeted investments can help the Municipality strengthen its position as a regional commercial centre that responds to evolving household needs, mobility patterns, and spending capacity.

Figure 2.1-3 shows the age distribution for 2024 across the Red Lake trade area. The age structure and median age in the Municipality of Red Lake (38 years), Ear Falls (43 years), and the Kenora CD (36 years) are similar and align closely with the provincial average (40 years). In contrast, the Indigenous communities have a notably younger population, with median ages ranging from 20 years in Poplar Hill First Nation to 31 years in Pikangikum First Nation—roughly 15 years younger than the trade area average (Environics 2024).

Figure 2.1-3: Red Lake Trade Area Age Distribution and Median Age, 2024



Source: Environics 2024.
Notes:
1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

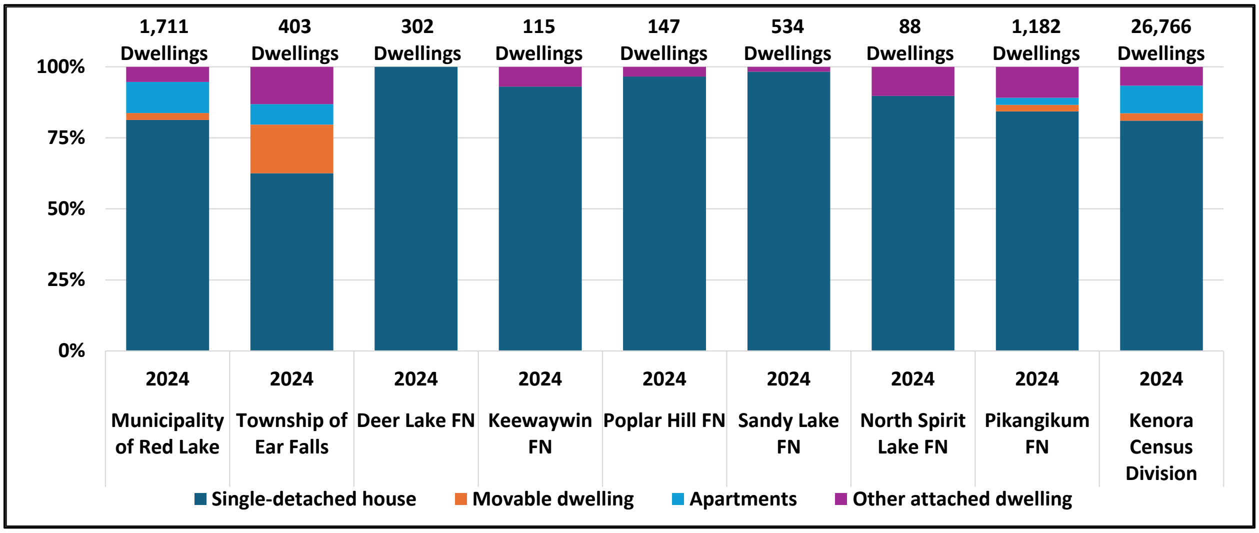
In 2024, the proportion of the population within the Red Lake trade area aged 14 years and younger was around 18% within the Municipalities of Red Lake and Ear Falls and ranged between 25% (Pikangikum First Nation) to 40% (Poplar Hill First Nation) among the First Nation communities (Environics 2024). The working-age population (15 to 64 years) ranged from 57% in Poplar Hill First Nation to 65% in the Municipality of Red Lake and North Spirit First Nation. However, First Nation communities had a higher proportion of individuals aged 15 to 39 compared to those aged 40 to 64. Meanwhile, seniors (65 years and older) make up 16% of the Municipality of Red Lake's population and 21% of Ear Falls', but less than 6% in each First Nation community, excluding Pikangikum First Nation (12%).

Between 2021 and 2024, the Red Lake trade area was forecasted to see a slight increase in median age, reflecting a decrease in the proportion of children (0 to 14 years) and a rise in the senior population (65+ years) (Environics 2024; Statistics Canada 2023). These trends are consistent with broader regional aging patterns.

The age distribution highlights a need for expanding goods and services tailored for specific population groups, such as for youths and seniors. For example, a high proportion of families with children may create demand for more recreational goods and services or youth clothing stores. In contrast, a growing number of seniors in the Municipality necessitate the attraction of businesses which offer support services or products to seniors, such as home care, house and pet sitting, property maintenance services, mobile services, and home security (Discover Kirkland Lake n.d.). Targeted business development that reflects the unique age profiles of trade area communities will be key to supporting population needs and maximizing commercial opportunities.

Figure 2.1-4 shows the occupied private dwellings by structural type for 2024. Dwellings in the Red Lake trade area are predominantly single-detached houses, with a small proportion of apartments and movable dwellings in the Municipality of Red Lake and Ear Falls (Environics 2024).

Figure 2.1-4: Red Lake Trade Area Occupied Private Dwellings by Structural Type, 2024



Source: Environics 2024.
Notes:
1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.
2. Totals may not add to 100% due to a statistical procedure of random rounding to preserve the confidentiality of respondents.

In 2024, over 80% of dwellings were single-detached homes in the Kenora CD. A similar trend was observed for most communities within the Red Lake trade area, except for Ear Falls, where the proportion was 64% in 2024. In the Municipality of Red Lake, Ear Falls, and North Spirit First Nation, over 10% of dwellings were apartments or movable dwellings, which typically supports greater population density per hectare.

In 2024, the average household size was forecasted to be 2.4 persons per household in the Municipality of Red Lake, 2.2 in Ear Falls, and around 2.7 in both the Kenora CD and Ontario. In contrast, the First Nation communities within the Red Lake trade area had larger households and ranged from 3.5 in North Spirit First Nation to 5.3 in Poplar Hill First Nation persons per household (Environics 2024).

Homeownership rates were relatively stable in 2024 across the broader trade area. In 2024, at least 65% of dwellings were owned by its occupants in the Municipality of Red Lake, Ear Falls, and Ontario, and the remaining dwellings were rented. In the Kenora CD, 60% of dwellings were owned by its occupants and the remaining 40% were either rented or are classified as band housing[6]. Over 75% of dwellings in the First Nation communities within the Red Lake trade area

[6] Band housing is common for First Nation reserves and is a classification used for historical and statutory reasons because shelter occupancy on reserves does not follow usual classification by standard tenure categories (Statistics Canada 2023).

are classified as band housing, while the remaining dwellings were mostly owned, excluding Pikangikum where almost 40% are owned or rented (Environics 2024). The occupied dwellings by structural types, average number of persons per household, and tenure status was forecasted to remain relatively stable between 2021 and 2024 (Statistics Canada 2023; Environics 2024).

Census family households made up around 60% of all households across the trade area, consistent with the Kenora CD and Ontario trends. A census family is defined as a married couple, common-law couple, or a lone-parent family with at least one child living at home (Statistics Canada 2023). Over 45% of census families had children living at home within the Red Lake trade area communities. The Municipality of Red Lake (56%) and Ear Falls (45%) had a slightly lower proportion of census families with children living at home compared to the Ontario average (62%). The proportion of census families with children living at home in the First Nation communities was over 80% for each community (Statistics Canada 2023). The higher percentage of census families with children living at home in the First Nation communities can partly be explained by the lower median age in the communities, which ranged between 19 and 31 years old in 2024 (Environics 2024).

In 2024, Single-person households comprised 27–31% of households in the Municipality of Red Lake, Ear Falls, the Kenora CD, and Ontario, but were significantly lower in First Nation communities (between 9% and 25%). These variations in household composition help explain the lower average household sizes in non-First Nation communities. Census family characteristics across all trade area communities were forecasted to remain relatively stable between 2021 and 2024 (Statistics Canada 2023; Environics 2024).

These housing and household trends point to specific market opportunities. For example, the dominance of single-detached homes and high homeownership rates support demand for home improvement goods and contractor services. Meanwhile, the prevalence of single-person households creates opportunities for businesses offering recreation, fitness, or entertainment targeted at individuals. Finally, the larger household sizes in First Nation communities may indicate increased demand for family-oriented retail and essential goods.

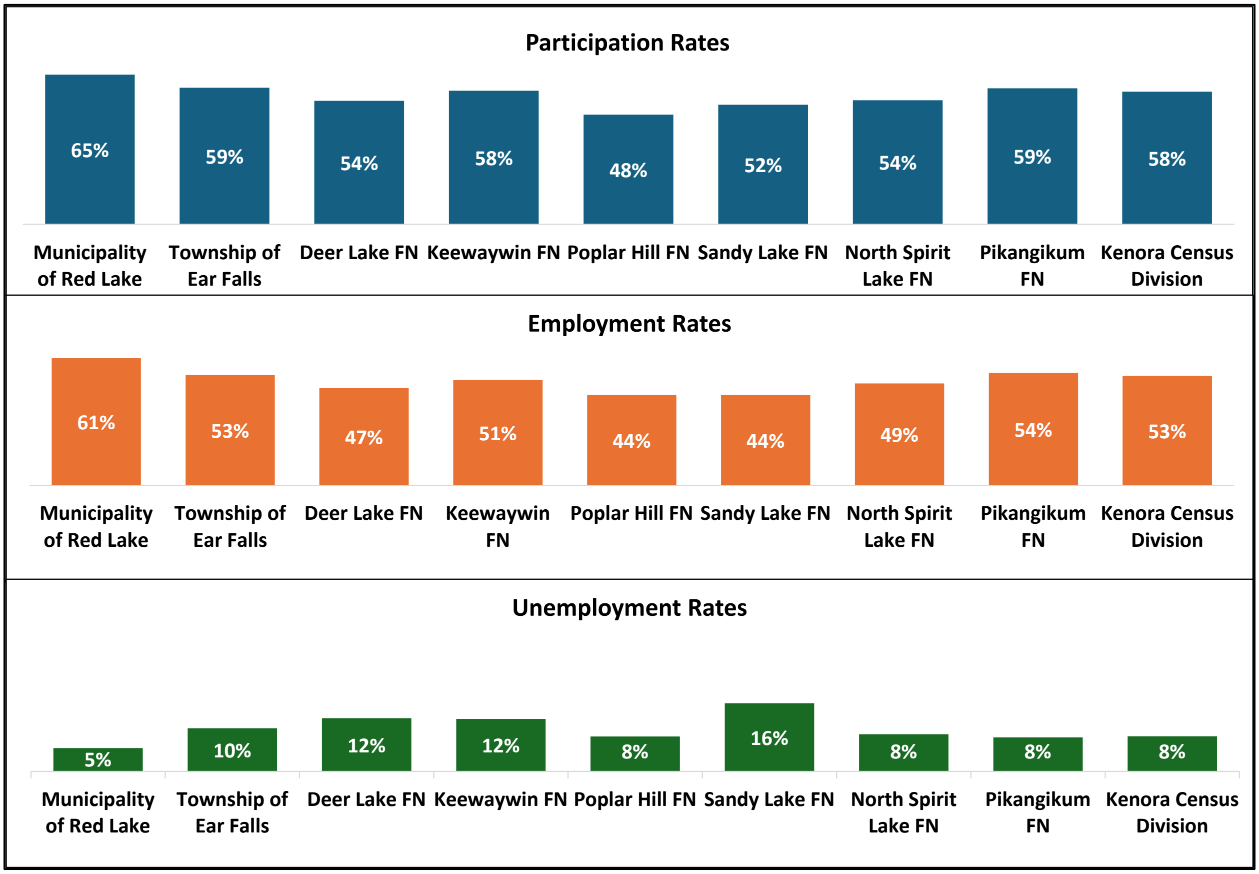
2.2 EDUCATION AND EMPLOYMENT

Understanding education and employment trends across the Red Lake trade area is key to assessing current labour capacity, identifying gaps, and targeting workforce development to meet future economic demand. This section summarizes participation, employment, and unemployment rates, as well as levels of educational attainment, to help identify where investment in training, services, or recruitment is most needed.

Education and employment patterns across the Red Lake trade area reveal both strengths and challenges for workforce readiness and business growth Participation and employment rates in the Municipality of Red Lake and Ear Falls are similar to or above the provincial average, while they were materially lower, though improving, in the First Nation communities. The proportion of the population who have completed high school is above 70% in the Municipality of Red Lake and Ear Falls and between 20% to 70% for the First Nation communities in 2024. The largest proportions of the population with a postsecondary education have completed a college certificate or diploma or an apprenticeship or trades certificate as their highest level of education (Environics 2024). Despite a statistically strong labour market, businesses in the Municipality face persistent worker shortages, particularly in trades and service sectors. These trends highlight the need for workforce development, housing, and support infrastructure to attract and retain workers and meet the growing service needs of a diverse and expanding trade area.

Figure 2.2-1 show employment characteristics for 2024. Participation and employment rates in the Municipality of Red Lake are higher than all other Red Lake trade area communities. The unemployment rate is lowest in the Municipality of Red Lake and highest in Sandy Lake First Nation. Unemployment rates in all other trade area communities are similar to those in the Kenora CD.

Figure 2.2-1: Red Lake Trade Area Labour Force Characteristics, 2024



Source: Environics 2024.

Notes:

1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In 2021, the labour force in the Municipality of Red Lake was 2,170 and was projected to decrease slightly to 2,145 in 2024 (Environics 2024; Statistics Canada 2023). The Red Lake trade area was projected to have a labour force of 5,995 people (59% participation rate), of which, 5,480 people were employed (54% employment rate) in 2024.

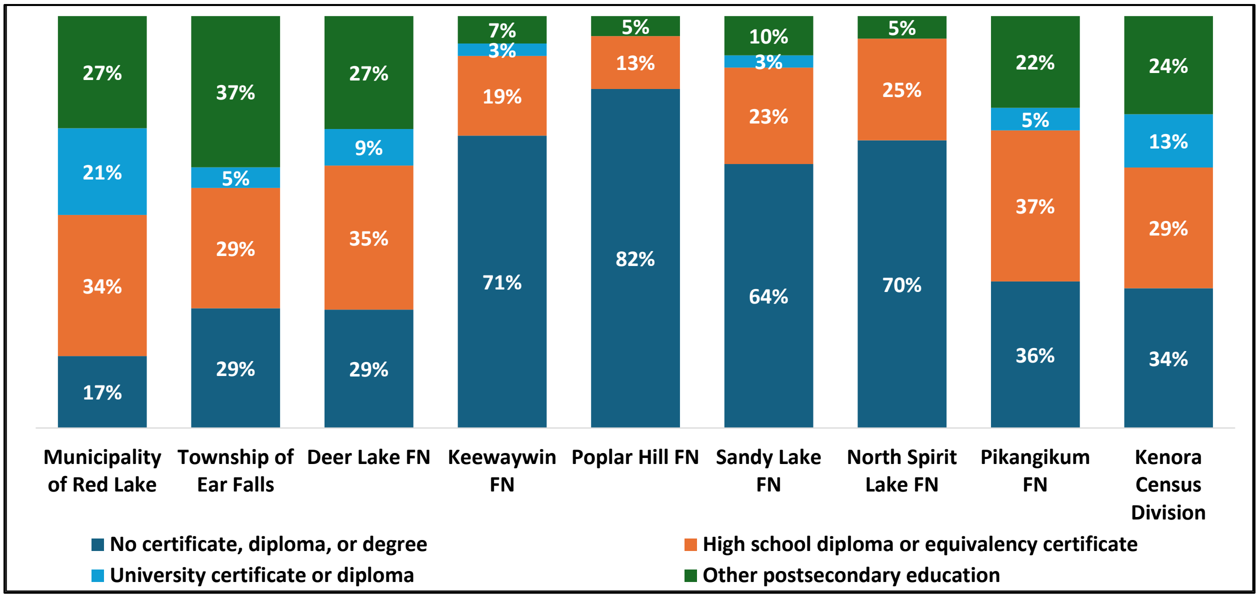
In 2024, the Municipality of Red Lake had the highest participation (65%) and employment (62%) rates in the trade area, exceeding the provincial average. Ear Falls followed, with slightly lower rates (59% participation, 53% employment). First Nation communities had lower but improving participation and employment rates, ranging from 44% to 55% employment. Unemployment in the Municipality remained low at 5%, while it ranged from 9% to 21% elsewhere. These figures indicate that while the Municipality remains a regional employment hub, other trade area communities—particularly Sandy Lake and Poplar Hill First Nations—face barriers to labour force participation.

Since 2011, the Municipality of Red Lake and the Township of Ear Falls have experienced a steady decline in labour force size, largely due to aging populations. This decline is occurring alongside labour shortages in sectors like education, health, and service industries. Stakeholders consistently noted that even the low reported unemployment rate understates the problem: job postings go unfilled, and skilled tradespeople—particularly contractors—are in short supply. The result is a labour market that appears statistically healthy but faces challenges locally and in practice. This has implications for business attraction and retention, especially in retail and service sectors.

These labour force trends suggest that while the Municipality currently benefits from a strong employment base, the declining labour pool and ongoing recruitment challenges may constrain future growth. As the community prepares for new economic activity tied to mining and infrastructure projects, targeted investments in workforce development, housing, and supportive services will be essential to attract and retain workers and sustain long-term growth. Expansion of the retail-commercial sectors will further stimulate economic activity, support the attraction and retention of newcomers, and enhance the quality of life for current residents.

Figure 2.2-2 and **Figure 2.2-3** show the 2024 educational attainment and post-secondary educational attainment rates, respectively. Educational attainment is the highest level of education a person has achieved at the time of the Census collection period. High school completion rates are highest in the Municipality of Red Lake and Ear Falls and lowest in Poplar Hill First Nation. The most common type of post-secondary education completed was a college certificate or diploma.

Figure 2.2-2: Red Lake Trade Area Educational Attainment, 2024



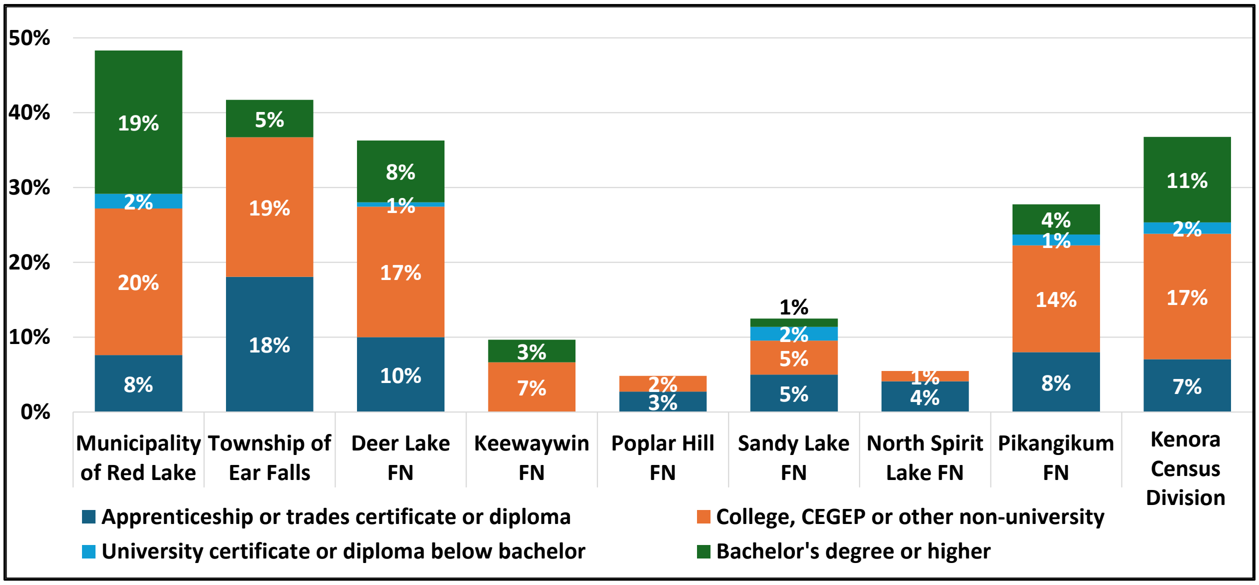
Source: Environics 2024.

Notes:

1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In 2024, over 80% of the population 15 years and older have obtained a high school certificate or equivalent in both the Municipality of Red Lake and Ontario compared to about 70% in Ear Falls. Among the First Nation communities, between 20% (Poplar Hill First Nation) and 70% (Deer Lake First Nation) have obtained a high school certificate or equivalent (Environics 2024). The lower proportion of the population who have completed high school can be partially attributed to the younger population, where about 10% of the total population are between the ages of 15 to 19 years old.

Figure 2.2-3: Red Lake Trade Area Post-Secondary Educational Attainment, 2024



Source: Environics 2024.

Notes:

1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In the Municipality of Red Lake, almost 50% of the population had a postsecondary education as their highest level of educational attainment in 2024. This rate is higher in Red Lake compared to Ear Falls (43%) and in each of the First Nation communities, but slightly below the Ontario average (59%) (Environics 2024). Between 2021 and 2024, postsecondary educational attainment was forecasted to remain constant for the Municipality and Ear Falls but increase across the First Nation communities. The projected increase may be due to the large proportion of the population that is under 30 years old, many of whom may not have completed schooling by 2024 (Environics 2024; Statistics Canada 2023). Among the First Nation communities, Deer Lake First Nation (36%) and Pikangikum First Nation (28%) were forecasted to have the highest proportion of the population who completed a postsecondary education (Environics 2024).

In both the Municipality of Red Lake and Ear Falls, about 20% of the population had a college certificate or diploma as their highest level of education, and comparable to the Ontario average in 2024. Ear Falls (18%) and Deer Lake First Nation (10%) had the highest proportions of residents with an apprenticeship or trades certificate or diploma as their highest level of education, both exceeding the Ontario average (5%) (Environics 2024). Meanwhile, 19% of the Municipality of Red Lake population held a bachelor's degree or higher, followed by Deer Lake First Nation (8%) and Ear Falls (5%) (Environics 2024).

The proportion of the population who have completed high school or equivalent has steadily increased from 77% in 2011 to 82% in 2024 (Environics 2024; Statistics Canada 2013). However, over the same period, the proportion of the population who have completed a post-secondary education has steadily decreased from 54% in 2011 to 48% in 2024. For post-secondary education, the largest decrease occurred in the proportion of the population with an apprenticeship or trades certificate or diploma. This decline aligns with both provincial and national trends (Environics 2024; Statistics Canada 2013).

There is a shortage of skilled trades in and around the Municipality, where contractors prioritize work with the mines and general contractors in the Municipality are at capacity (Stakeholder Interview Program 2025). One challenge with attracting skilled labourers to the region is the lack of available housing and temporary accommodations. One mining company noted that there are 300 contractors from Australia with no available accommodations (Stakeholder Engagement 2025). This highlights the need for more housing and temporary accommodations to help with the attraction and retention of skilled trades workers.

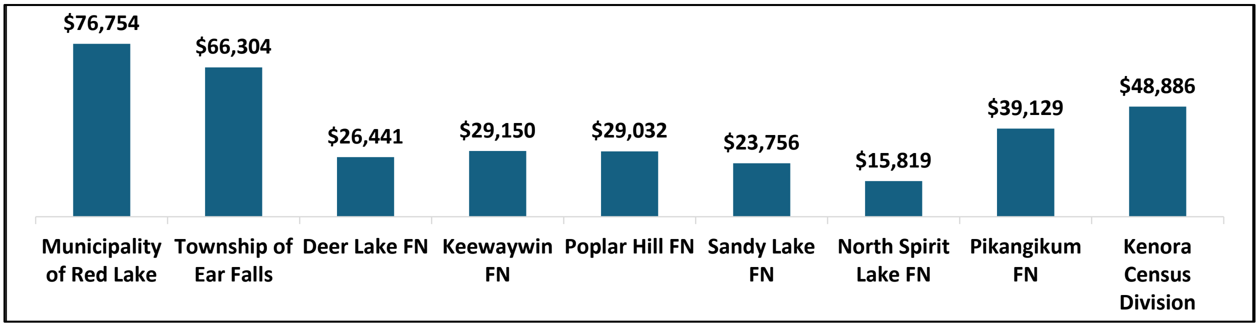
2.3 INCOME AND HOUSEHOLD SPENDING PATTERNS

Income characteristics and household spending patterns provide an overview of the purchasing power of people within a community. This information is used to inform the supply and demand analysis and support the identification of priority business types. Income characteristics and household spending patterns summarized in this section includes personal and household income, average hourly wages in Ontario, and expenditures by spending categories.

Income levels and spending patterns across the Red Lake trade area point to varying degrees of consumer purchasing power, with implications for business attraction and expansion. Average household and personal incomes in the Municipality of Red Lake and Ear Falls were consistently above the provincial average, driven largely by the mining sector’s high wages. In contrast, average incomes in surrounding First Nation communities remained lower. Higher incomes in Red Lake have translated into higher household spending—particularly on shelter, transportation, and food—which together account for more than 60% of expenditures. This purchasing strength positions the Municipality as a regional service hub, creating opportunities to grow or attract businesses that cater to unmet or underserved demand in areas such as retail, groceries, furnishings, personal care, and housing-related services. Sustained investment in housing, accommodations, and commercial offerings will be essential to fully leverage this spending power and enhance the Municipality’s role as a centre of economic activity in the trade area.

Figure 2.3-1 shows the average personal income characteristics for 2024. The Municipality of Red Lake had the highest average income, followed by Ear Falls. Both were higher than the Kenora CD. In contrast, incomes were notably lower in the First Nations communities, with Pikangikum First Nation reporting the highest and North Spirit First Nation the lowest.

Figure 2.3-1: Red Lake Trade Area Average Personal Income, 2024

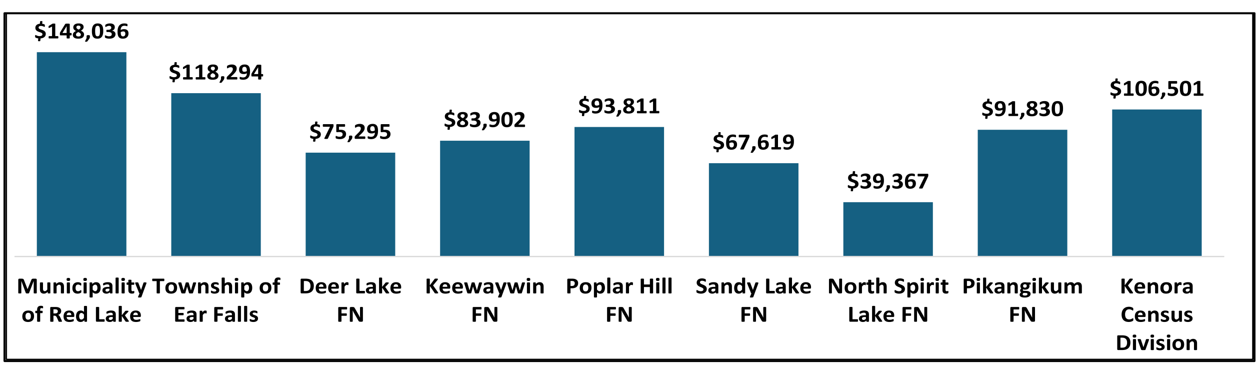


Source: Environics 2024.
Notes:
1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In 2024, the average personal income of $77,000 in the Municipality of Red Lake and $66,000 in Ear Falls were higher than the Ontario average ($59,000) and all other communities in the Red Lake trade area (Environics 2024). On average, men made more than women in the Municipality and Ear Falls, while women made more than men in the First Nations communities (Statistics Canada 2023). In the Municipality of Red Lake, the gap in average incomes between men and women was over $30,000 (63% higher), the next closest was Ear Falls at about $23,000 in 2020. The higher average personal income, particularly among men, can be attributed to the large proportion of the workforce employed in the mining sector, which has one of the highest wages across industries in Ontario ($38/hour in 2020 and $46/hour in 2024) (Statistics Canada 2023, 2025). Among First Nation communities in the Red Lake trade area, average annual personal incomes ranged between $16,000 (North Spirit First Nation) and $39,000 (Pikangikum First Nation) in 2024 (Environics 2024).

Figure 2.3-2 shows average household income characteristics for 2024. Average household income was highest in the Municipality of Red Lake, followed by Ear Falls in 2024. Both were higher than the Kenora CD. Average household income among the First Nations communities is highest in Poplar Hill First Nation and Pikangikum First Nation, and lowest in North Spirit First Nation (Environics 2024).

Figure 2.3-2: Red Lake Trade Area Average Household Income, 2024



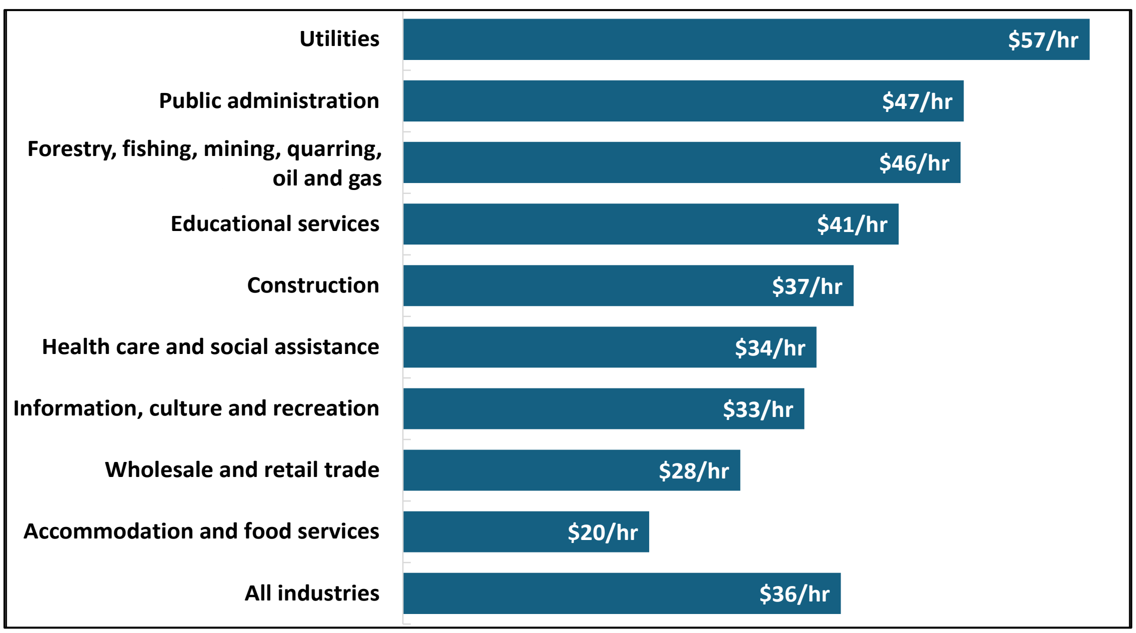
Source: Environics 2024.
Notes:
1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In 2024, the average household income of $148,000 in the Municipality of Red Lake was higher than the Ontario average ($133,000) and all other communities in the Red Lake trade area. Among the other communities in the Red Lake trade area, the average household income was highest in Ear Falls ($118,000) and Poplar Hill First Nation ($94,000) and lowest in North Spirit First Nation ($39,000) (Environics 2024). Between 2021 and 2024, the average household income was projected to increase for each of the Red Lake trade area communities.

The high incomes in the Municipality and growth in other communities present an opportunity for businesses to expand and for the attraction of new businesses which offer goods or services which are not currently available in the community or are not meeting current demands.

Figure 2.3-3 shows the hourly average wages by industry in Ontario for 2024. Average hourly wages by industry were only available at the provincial level. Average hourly wages were highest in the utilities industry, followed by public administration; forestry, fishing, mining, quarrying, oil and gas industries; and educational services in 2024. Wages were lowest in accommodations and food services. The average wages across all industries increased from $31/hour in 2020 to $36/hour in 2024.

Figure 2.3-3: Ontario Average Hourly Wages by Industry, 2024



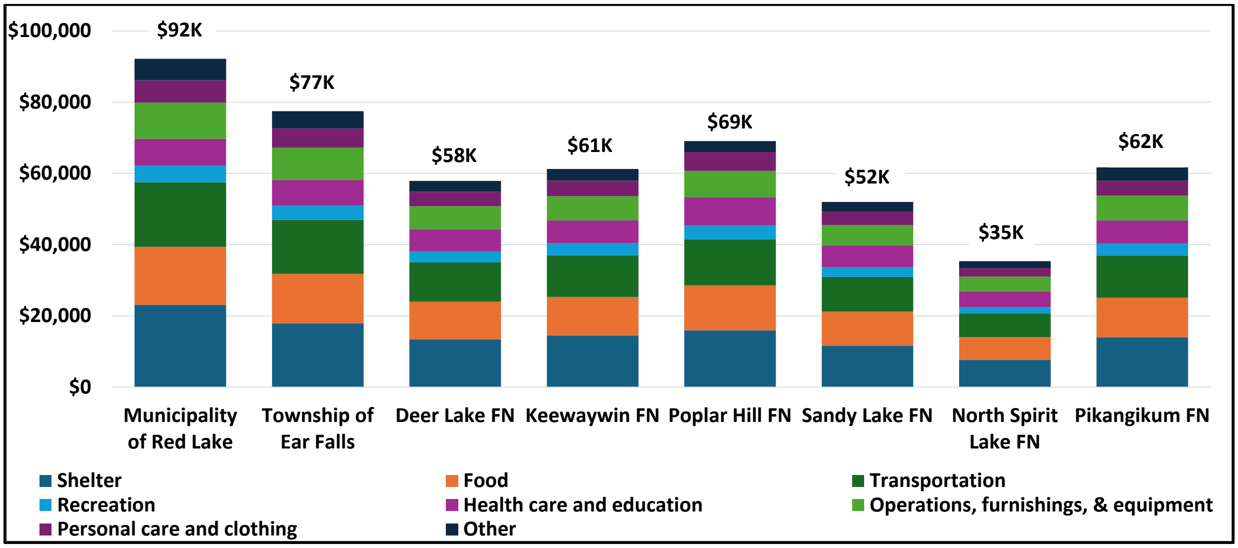
Source: Statistics Canada 2025.

In 2024, the average wage across all industries in Ontario was about $36/hour, with men earning an average of $39/hour and women earning $34/hour. The mining sector, which is predominantly made up of men in the Municipality of Red Lake, had an average wage of $46/hour, while the health care and social assistance sector, dominated by women in the Municipality, had an average wage of $34/hour (Statistics Canada 2025). The mining sector had the fifth-highest wage across industries in 2020 and the fourth highest in 2024. This helps explain the higher average personal income in the Municipality, particularly among men, compared to other communities in the Red Lake trade area.

The high wages for the mining sector, along with anticipated growth in the Municipality, highlight the need to enhance the community's appeal to support the attraction and retention of workers. Meeting this demand, will require adequate accommodations and housing.

Figure 2.3-4 shows the average household spending characteristics in 2024. The average household in the Red Lake trade area were forecasted to spend over 60% of their annual expenses on food, shelter, and transportation in 2024.

Figure 2.3-4: Red Lake Trade Area Average Household Spending, 2024



Source: Environics 2024.

In 2024, among the Red Lake trade area communities, households were forecasted to spend the largest proportions of their disposable income on shelter, transportation, and food expenses (Environics 2024). These proportions were similar to the Ontario average. The average consumption per household was forecasted to be highest in the Municipality ($92,000), followed by Ear Falls ($77,000), and Poplar Hill First Nation ($69,000). Average household consumption is closely linked to average household incomes, which helps explain why communities like Sandy Lake First Nation ($52,000) and North Spirit First Nation ($35,000) spent less.

Shelter costs in the Municipality of Red Lake ($23,000 in 2024) account for about 25% of average consumption per household, while transportation costs ($18,000) and food costs ($16,000) each make up around 20%. Household operations, furnishings, and equipment ($10,000) are the fourth-largest expenditure category, at just over 10% (Environics 2024). On average, households in the Municipality earn more than those in other communities in the Red Lake trade area, leading to higher spending across each category. The higher household income can be attributed to the large proportion of the workforce employed in mining, which had the fourth-highest average wage among industries in 2024 (Statistics Canada 2025).

The large amount of spending on food and retail goods and services—such as household operations, furnishings and equipment, personal care, and clothing—highlights the opportunity to grow and attract businesses offering these products. Supporting this growth can contribute to sustainable economic development and enhance the community's attractiveness—ultimately improving the well-being of both residents and visitors.

3.0 RETAIL-COMMERCIAL SUPPLY ANALYSIS

An analysis of the retail-commercial supply was conducted by assessing the existing supply of labour by industry sector, household spending patterns by retail sectors, and an inventory of businesses in the Red Lake trade area. This analysis helped identify gaps in the retail-commercial business landscape in the Municipality of Red Lake and supported the identification of target business types.

This section provides an overview of employment by industry sectors and household expenditures for retail and commercial goods and services including:

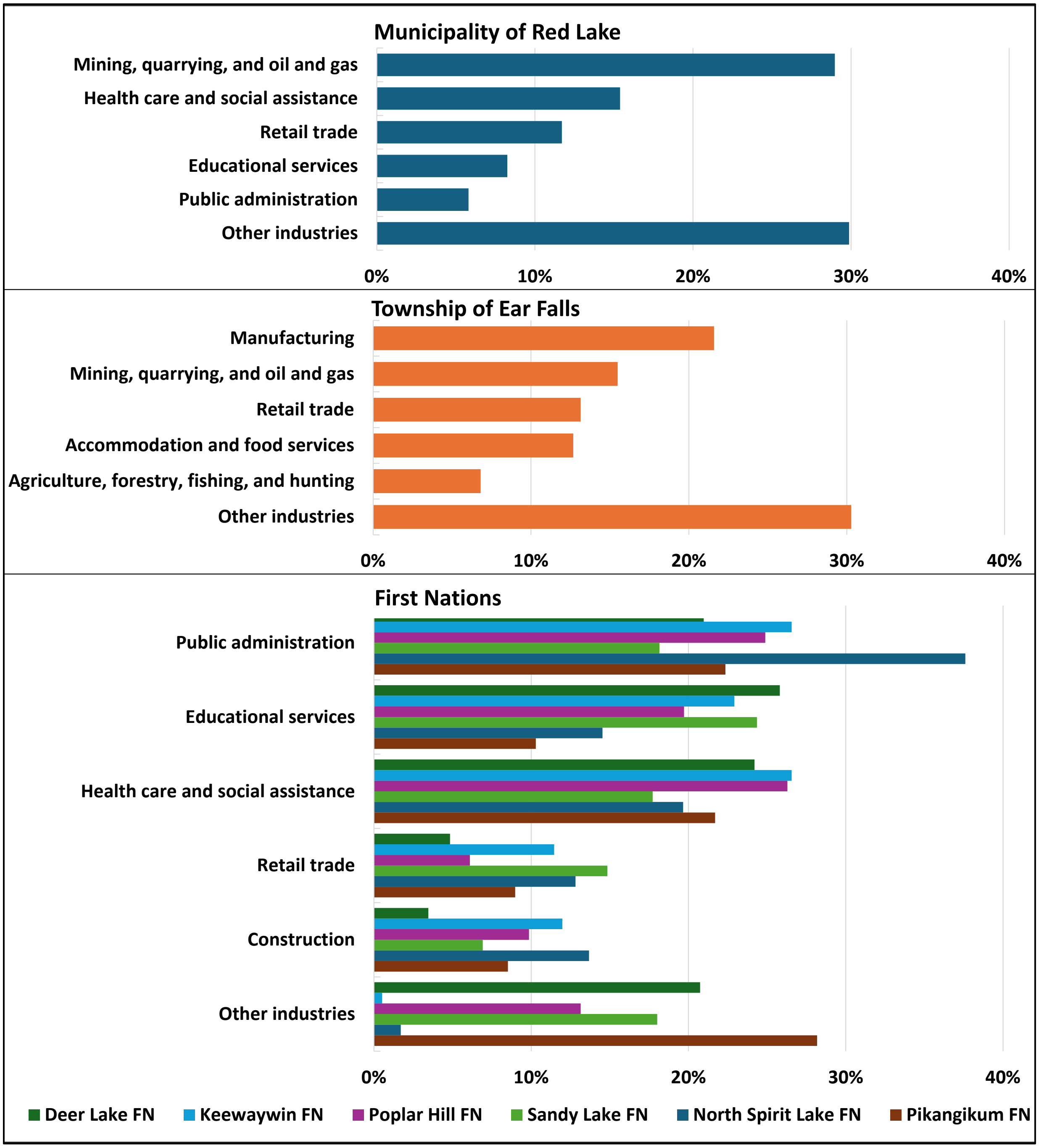
- Furnishings and equipment;
- Household supplies;
- Vehicle purchases and related expenses;
- Personal care products;
- Reading and printed materials;
- Recreation supplies and entertainment equipment; and
- Other expenses (e.g., alcohol and lottery or games of chance).

3.1 EMPLOYMENT BY INDUSTRY SECTORS

Employment by industry sectors provide an overview of the key economic drivers, workforce strengths, and potential gaps in labour supply.

Figure 3.1-1 shows the five largest employment sectors in each of the Red Lake trade area communities in 2024. In 2024, health care and social assistance, educational services, public administration, and retail trade were among the largest sectors of employment within each of the Red Lake trade area communities, excluding the Township of Ear Falls, where only retail trade was among the top five largest industries (Environics 2024). These trends mirror the Ontario average for employment by industry, with health care and social assistance, retail trade, and educational services industries each ranking among the top five largest sectors of employment.

Figure 3.1-1: Red Lake Trade Area Employment by Industry, 2024



Source: Environics 2024.

Notes:

1. Data for McDowell Lake First Nation is not available for 2024 due to the community's small population and the need to protect the residents' confidentiality.

In 2024, the top three largest sectors of employment in the Municipality of Red Lake are mining, quarrying, and oil and gas extraction (29%); health care and social assistance (15%); and retail trade (12%) (Environics 2024). The mining sector was predominantly made up of men (42% of men and 11% of women), while women lead the health care and social assistance sector (3% of men and 29% of women) in 2021 (Statistics Canada 2023). Employment trends in Ear Falls are similar to those in Red Lake with mining (16%) and retail trade (13%) being the second and third largest industries, respectively. Employment by industry levels were projected to remain relatively unchanged between 2021 and 2024 for each of the communities in the Red Lake trade area (Environics 2024; Statistics Canada 2023).

The most prominent retail-commercial sectors include retail trade; accommodation and food services; arts, entertainment and recreation; and construction (i.e., contracting services). Employment in the retail trade sector is among the more prominent industries across all communities in the Red Lake trade area. Sectors such as accommodation and food services, as well as construction also represent major sources of employment in several communities. In contrast, the arts, entertainment, and recreation sector generally are one of the smallest, accounting for around 2% of employment in the Municipality of Red Lake—similar to the Ontario average. Among the trade area communities, Ear Falls had the highest proportion in this sector, at around 5% (Environics 2024; Statistics Canada 2023). Staffing challenges were a key concern identified in the business survey, particularly in the accommodation and food services sector, which had the lowest average hourly wage of $20 in 2024 (Statistics Canada 2025). Other concerns included the need for improved community infrastructure and services to enhance the area's appeal to both businesses and visitors. Additionally, a lack of housing, public transportation, and promotional support hinders competitiveness with other communities and creates difficulties in both attracting and retaining both workers and customers. These issues have also affected other sectors—such as for education services, health care and social assistance, and mining—where employers struggle to fill vacancies despite offering higher average wages (Stakeholder Engagement 2025).

Supporting the development and growth of sectors outside of the mining sector—such as health care and social services, retail, and educational services—is crucial for building a sustainable and diverse economy. Chibougamau, Québec experienced a mining slowdown in the 1980s, which prompted economic diversification towards forestry, retail, and public sectors. This shift allowed the community to thrive despite the closure of its last operating mine in 2010 and its legacy as a historic mining town (Raymond Chabot Grant Thornton 2012).

3.2 HOUSEHOLD RETAIL EXPENDITURES BY INDUSTRY SECTORS

Understanding household spending helps identify the types of goods and services residents demand, where spending may be leaking outside the region, and what future business opportunities may emerge. This insight is critical to determining which sectors have the strongest potential for local investment, expansion, or attraction.

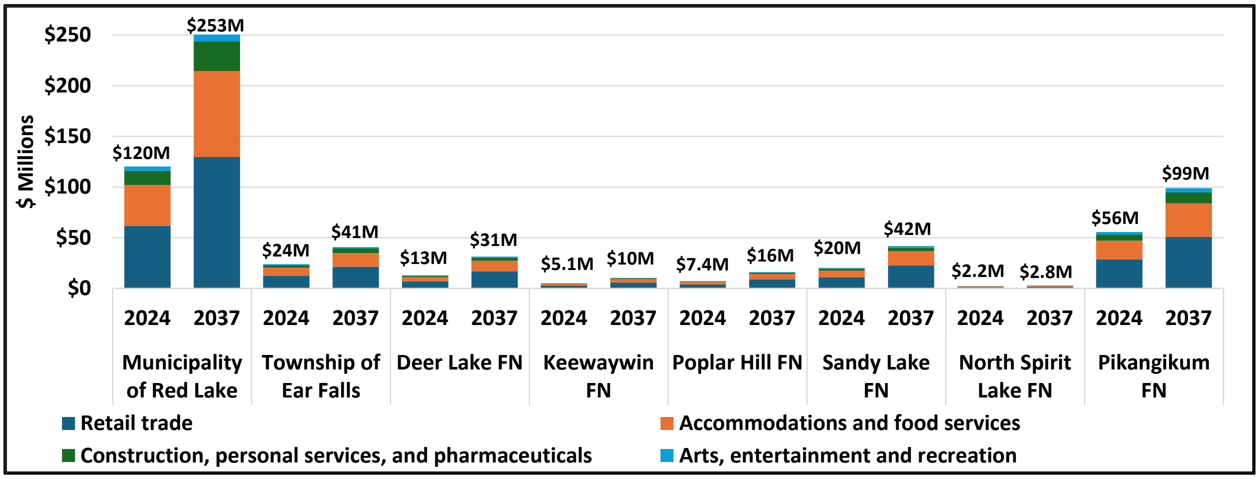
Total household expenditures by retail-commercial industries included spending at businesses in the following industries:

- Retail trade;
- Accommodation and food services;
- Construction (i.e., general contractors and specialty trade contractors), personal services (e.g., accounting, legal, and financial), and pharmaceuticals; and

- Arts, entertainment, and recreation sectors.

Figure 3.2-1 shows the forecast annual retail-commercial household spending by industry sector in 2024 and 2037. In both years household spending in retail trade and accommodations and food accounted for over 80% of retail-commercial expenditures for all communities.

Figure 3.2-1: Red Lake Trade Area Household Expenditures by Industry, 2024 and 2037



Source: Environics 2024.
Notes:
1. Household expenditure projections for 2037 were completed by InterGroup Consultants Ltd.

In 2024, total expenditure on goods and services from the retail-commercial sectors was highest in the Municipality of Red Lake ($120 million), followed by Pikangikum First Nation ($56 million), Ear Falls ($24 million), and lowest in North Spirit First Nation ($2.2 million). Among the retail-commercial sectors, spending was highest for the retail trade industry (about 50%), followed by accommodations and food services (about 33%) (Environics 2024).

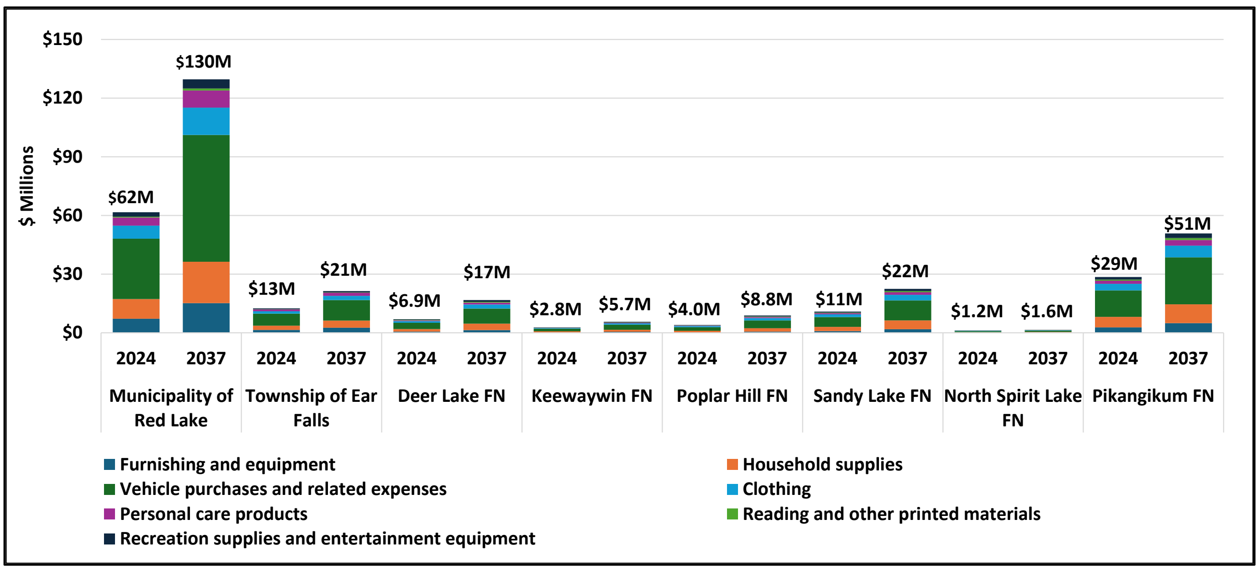
Between 2024 and 2037, spending on goods and services within the retail-commercial sectors was forecasted to increase from $120 million to $253 million in Red Lake (5.9% average annual growth), primarily due to the large projected increase in households. The largest average annual growth in expenditures was forecasted to occur in Deer Lake First Nation (7.0% average annual growth) and the smallest growth in North Spirit First Nation (1.9% average annual growth).

The large, forecasted growth in the Municipality and communities like Deer Lake First Nation and Pikangikum First Nation present an opportunity to expand the retail-commercial offerings within the Municipality, and tailor the growth to the specific needs of the trade area communities. Results from the business survey found that about 50% of businesses in the Municipality of Red Lake served less than 75 customers in a typical day and over 75% of businesses would be able to comfortably accommodate future growth (Business Survey 2025). Businesses in the Municipality typically have the most business in the summer (i.e., June – August) and the least business in the winter (i.e., December – February). This is likely due to the increased demand of tourism during the summer months and many people from northern communities coming to purchase goods and services within the community. The all-season road and bridge project to Pikangikum First Nation and improvements to winter roads between the First Nation communities within the Red Lake trade area has the potential to result in an increase in demand for services during shoulder (i.e., spring and fall) and off-peak seasons.

Figure 3.2-2 shows the forecast annual retail-commercial household spending for retail goods and services, in 2024 and 2037. In both 2024 and 2037 the largest proportion of spending across communities was forecasted to be on vehicles purchases and related expenses, household supplies, and furnishings and equipment. Spending on goods and services from the retail trade sector include:

- Furnishings and equipment;
- Household supplies;
- Vehicle purchases and related expenses;
- Personal care products;
- Clothing;
- Reading and printed materials; and
- Recreation supplies and entertainment equipment.

Figure 3.2-2: Red Lake Trade Area Retail Trade Expenditures by Industry, 2024 and 2037

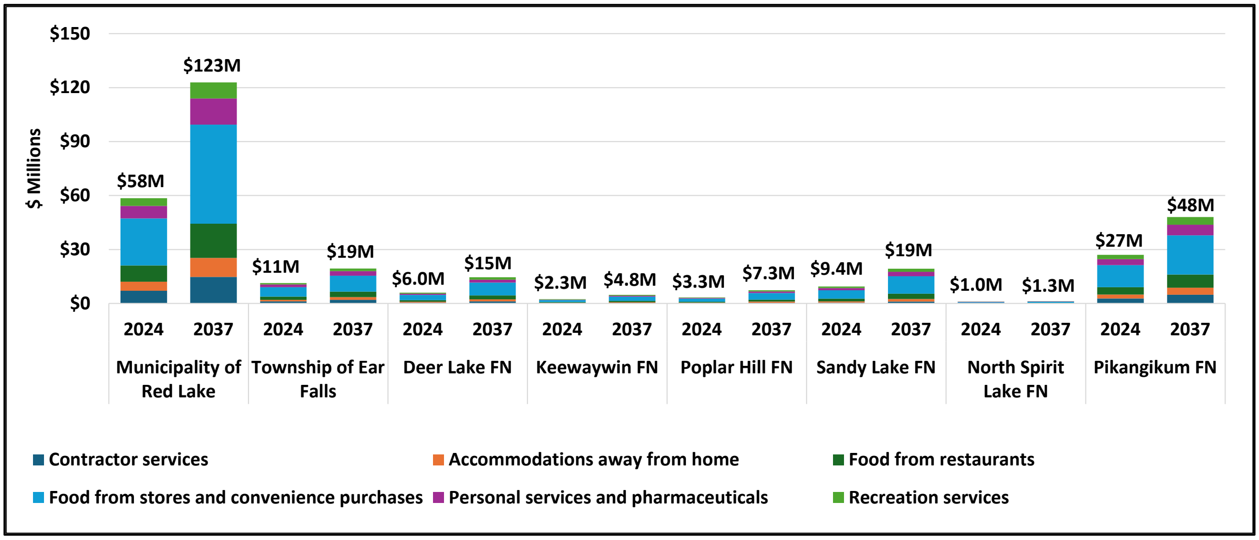


Source: Environics 2024.
Notes:
1. Household expenditure projections for 2037 were completed by InterGroup Consultants Ltd.

For the Red Lake trade area communities, the largest proportion of retail trade expenditures was on vehicle purchases and related expenses (about 25%), followed by household supplies (about 10%) (Environics 2024).

Figure 3.2-3 shows the forecast annual retail-commercial household spending for other household goods and services, in 2024 and 2037. In both 2024 and 2037 the largest proportion of spending across communities was projected to be on food from stores and restaurants and contractor services. Other household expenditures were projected to include food and accommodations, contractor services, and personal services (e.g., accounting, legal, and financial services) and pharmaceuticals.

Figure 3.2-3: Red Lake Trade Area Other Household Expenditures by Industry, 2024 and 2037



Source: Environics 2024.
Notes:
1. Household expenditure projections for 2037 were completed by InterGroup Consultants Ltd.

For the Red Lake trade area communities, the largest proportion of other household expenditures was forecasted to be on food from stores and convenience purchases (about 22%), followed by food from restaurants (about 8%), personal services and pharmaceuticals (about 6%) and contractor services (between 2% to 6%) (Environics 2024).

In the Municipality of Red Lake, total spending on vehicle purchases and related expenses was forecasted to be $65 million in 2037. The next largest expenditures are food from stores and convenience purchases ($55 million), followed by household supplies ($21 million) and food from restaurants ($19 million). Over 60% of respondents to the business survey estimated that more than 10% of the customer base come from outside the Municipality (Business Survey 2025). Although the proportion of the customer base that is outside the Municipality is likely to vary across businesses and industries, this presents an opportunity for businesses to expand services and capacity to meet the demands for goods and services required by residents of communities within the Red Lake trade area.

3.3 PROMINENT RETAIL BUSINESSES

This section provides an overview of retail businesses in addition to contracting companies in the Red Lake trade area. Understanding the current business offerings in the Red Lake trade area was used to identify gaps in the retail-commercial business landscape in the Municipality and supported the identification of target business types.

Table 3.3-1 shows a summary of the number of the businesses in each of the Red Lake trade area communities, corresponding to the business inventories presented in **Table 3.3-2** to

Table 3.3-10. Understanding the supply of businesses is essential as it helps identify what goods and services are available to consumers and provides a comparison for local supply against consumer demand. The Red Lake trade area has a limited number of restaurants, with only three sit-down establishments within the Municipality of Red Lake. This presents an opportunity to expand restaurants offerings and capture more spending within the Municipality.

While the number of accommodations, retail stores, recreation services, and contractor services may appear adequate, stakeholders have noted that accommodations and contractor services are not meeting current demand. In addition, they identified a limited variety of retail clothing stores and paid recreation options, as well as the absence of a furniture or home appliance store (Stakeholder Engagement 2025; Stakeholder Interview Program 2025).

Table 3.3-1: Red Lake Trade Area Number of Businesses

<table>
<tr><th>Business Offerings[1]</th><th>Municipality of Red Lake</th><th>Township of Ear Falls</th><th>First Nation Communities[2]</th></tr>
<tr><td>Accommodations</td><td>10</td><td>5</td><td>5</td></tr>
<tr><td>Food stores</td><td>16</td><td>8</td><td rowspan="2">21</td></tr>
<tr><td>Restaurants</td><td>9</td><td>7</td></tr>
<tr><td>Retail stores and services, including automotive</td><td>87</td><td>22</td><td>-</td></tr>
<tr><td>Recreation services[3]</td><td>28</td><td>18</td><td>-</td></tr>
<tr><td>Personal services[4] and pharmaceuticals</td><td>14</td><td>12</td><td>-</td></tr>
<tr><td>Contractor services</td><td>33</td><td>17</td><td>-</td></tr>
</table>

Notes:

1. Business offerings are categorized based on the products or services offered by each business. Some businesses may fall under multiple categories.
2. The business inventory for First Nation communities within the Red Lake trade area was developed using publicly available online sources and may not capture all the businesses and services operating in each community.
3. Recreation services include recreational good retailers, clubs, arenas, and gyms.
4. Personal services include accounting, legal, and financial business services.

Tables 3.3-2 to **Table 3.3-5** include an inventory of businesses in the Municipality of Red Lake engaged in the retail trade, accommodation and food services, construction (i.e., general contractors and specialty trade contractors), personal services (i.e., accounting, legal, and financial services), and arts, entertainment, and recreation sectors. These sectors correspond to the household expenditures by industry outlined in **Section 3.2.** Some businesses operate across multiple sectors, which may result in double counting.

The business inventory for the Municipality of Red Lake shows that there are limited retail stores and services and paid recreation offerings. This finding was supported by local insights gathered during the stakeholder interview program, which also indicated that accommodations, contractor services, and automotive services are all operating at or near capacity (Stakeholder Interview Program 2025).

Table 3.3-2: Municipality of Red Lake Accommodation and Food Service Businesses

Business Type	Businesses	
Accommodations Hotel, motel, room and board services, apartment rentals, or bed & breakfast.	• A & D Rentals • The Balmer Hotel & Restaurant • Dexter Apartments • Howey Bay Motel & Restaurant	• Mainland 125 – Rental • Nature's Inn • Norseman Annex • Paddle Inn Bed & Breakfast • Red Lake Accommodations • Super 8
Food stores Grocery, wholesale, catering, convenience stores, and liquor stores.	• Balmertown Food Fair • Balmer Variety • Flying Wild Rice Co. • Grasley's Ontario Birch Syrup • Kreger's Krates Bulk Foods & More • Loco Wholesale • M&M Meats Express	• Mitchel's Midtown Grocery • Red Lake IGA • RL Filipino-Canadian Cuisine • Spud & Dog (Seasonal) • Station 105 Red Lake Inc. • The Beer Store • The Liquor Store / LCBO • The Water Buffalo • Video Plus
Restaurants Sit down eating and fast food.	• Antonio's Restaurant • Ashlee's Kitchen • The Balmer Hotel & Restaurant • Gondola Pizza	• Howey Bay Restaurant & Lounge • Spud & Dog • Subway • Tim Horton's • The Water Buffalo

Source: CCDC 2025a.

Table 3.3-3: Municipality of Red Lake Retail Businesses

Business Type	Businesses	
Automotive sales, service & rentals Automotive and recreational vehicle dealers, fuel, mechanic services, car wash, and rental services.	• Clark's Corner Gas • Eagle River Enterprises • Fountain Tire • Golden Eagle Car Wash • Morgan Fuels • NGI (Northern Gas Installers) • Petro-Pass Truck Stop (Mike Litwin Fuels)	• Red Lake Marine Products and Rentals Ltd. • Red Lake Salvage • Spinelli Auto Repair • Station 105 Red Lake Inc. • Supreme Auto Body • Tru North Parts & Service • Vito Tarantino Ltd.
Retail stores and services	• 51 Degrees North Photo & Video • Baby Melons Co. • Balmer Variety • Bell Canada • Bell TV • Bellezza Hair & Esthetics • Bigfoot Engraving • BLUSH Handmade Cosmetics/Gifts • Buford & Figgy's Place • Carla's Clippers • CBC - FM Radio • Cease Fire Vape Shop • The Cheeky Beaver Boutique • Chukuni River Greenhouses • Chukuni Outdoor Supply • CKDR - FM Radio • Coates of Colour • Computer Mania & A Byte Extra • DNR Delivery Inc. • Donna's Dollar Store • Eagle River Enterprises • EC- Photography • EECOL Electric • Encore Kidz Warehouse • Finishing Touches • Fishing Master • Forever Green Gift Boutique • Fountain Tire • Gail's Essential Body Care • Gail's Stitches • Gardewine North • Graber Imaging • Ink & Alchemy • JR – Esthetics • Lakeside Marina Ltd.	• The Liquor Store / LCBO • Marnics Mobile Red Lake • McTaggarts • Moffatt Supply & Specialties • Murphy's Cell Repair • Nails with Love • Northern Impressions by Sara • Northern Temple Tattoo • Northwest Timber Mart • Old World Market Red Lake • Pawzwild • Pioneer Laundry • Purolator Courier • Red Apple • Red Lake 2nd Chance Thrift • Red Lake Home Hardware Building Centre • Red Lake Marine Products • Red Lake Petroleum Products • Red Lake Pharmacy Ltd. • Red Lake Storage • Red Lake Travel • Shaw Cable • Signhawk Graphics • Sling Choker MFG • Southpaw Photography • Studio 1 Hair Design • Tangled Hair Design • TBAYtel • The Water Buffalo • Treasure House of Red Lake • Tru-North Parts & Service • U-HAUL • Video Plus • Vivian's Nail Knowledge Studio • West End Cannabis Co. • Weston Bakeries Ltd. • Wilsons Business Solutions • Windows To Imagination

Source: CCDC 2025a.

Table 3.3-4: Municipality of Red Lake Arts, Entertainment, and Recreation Businesses

Business Type	Businesses	
Recreation services	• Age Friendly 55+ • Balmertown Figure Skating Club • Chukuni Rod & Gun Club • Chukuni Outdoor Supply • Chukuni Shotokan Karate Club • Cochenour Arena and Community Hall • Evolution Recreation Centre • Excellent Adventures • Girl Guides of Canada • Goldseekers Canoe Outfitting • Homegrown Dance Centre • K.P.'s Dreams Dance Academy • Loon Haunt Outfitters • Mat Cats Gymnastics • Norseman Festival	• Patricia Players • Red Lake District Curling Club • Red Lake Minor Hockey Assoc. • Red Lake Archery • Red Lake Golf & Country Club • Red Lake Regional Heritage Centre • Red Lake Community Fitness Centre • Red Lake Trail Masters • RLD Cross Country Ski Club • Royal Canadian Legion Branch 102 • Royal Canadian Sea Cadets • Scouts Canada • Sunset Lodge & Outfitters

Source: CCDC 2025a.

Table 3.3-4 Continued: Municipality of Red Lake Arts, Entertainment, and Recreation Businesses

Business Type	Businesses	
Outfitting services	• Amik Outposts • Angler's Kingdom • Big Hook Wilderness Camps • Birch Point Camp • Black Bear Lodge • Black Moose Outposts • Bob Green's Fishing Camps • Booi's Fly-in Lodge & Outposts • Bow Narrows Camp • Brownlees Holiday North Lodge • Bull Moose Camp • Canadian Fly-In Fishing • Cat Island Lodge • Chimo Lodge & Outposts • Chukuni River Campground • Cochenour Cabin • Coli Lake Camp • Eagle Falls Lodge • Echo Lake Lodge • Excellent Adventures • Five Lakes Lodge • Geary's Sportsman's Lodge	• Golden Hook Camp • Gullrock Lake Lodge • Howey Bay Resort Ltd. • Jack Green's Fly-In Camps • Jetté's Adventures • Latreille Lake Lodge • Loon Haunt Outposts • Medicine Stone Resort • Mother Rapids Fish Camps • North Spirit Lake Lodge Ltd. • Nungesser Lake Lodge • Poplar Point • Procyks Anglers Paradise Lodge • Rod & Holly's McKenzie Island Cabins • Sabourin Lake Lodge • Sandy Beach Lodge • Snake Falls Camp • Stormer Lake Lodge • Sunset Lodge • Sydney Lake Lodge • Trout River Lodge & Trailer Park • Viking Island Lodge • Wright's Wilderness Camp

Source: CCDC 2025a.

Table 3.3-5: Municipality of Red Lake Construction and Personal Service Businesses

Business Type	Businesses	
Personal services and pharmaceuticals Pharmacy, legal, accounting, and financial services.	• ABP Bookkeeping • CIBC • Davis Tax Preparation • Ericksons LLP • IG Wealth • Red Lake Medicals • Red Lake Pharmacy (1985) Ltd.	• Scotiabank • Shewchuk, Ormiston LLP • The Standard • SureTax • Thiessen Bookkeeping • Trevor Zhukrovsky • Westland Insurance
Contractor services	• 105 Mechanical • Anderson Electric Inc. • Barry's Bait & Plow Inc. • Blue Heron Environmental • CIMA+ Engineering • D. McGrath Plumbing Inc. • Derek James Carpentry • Draco (1985) Ltd. • Far North Contracting Inc. • Finish It Construction • Green Acres Contracting • Kazz North Cutting • Kevin Geary's Snow Removal • Kustom FIT Window & Door • LaFarge Canada • Lynx Lawn Cutting • M.L. Yutzy Contracting	• McCullough's Carpentry Ltd. • Morgan Brushing &Tree Service • NGI - Northern Gas Installers • Multicrete Group • Nighthawk Construction • PACE Builders • Red Lake Plumbing & Heating • Red Lake Rentals • Red Lake Property Management • RSL Painting Plus • Samson's Services • Shewchuk Enterprises Limited • Skookum Subdivision Inc. • Validus Drafting & Design • Viking Electric • Vito Tarantino Limited • Walsh Yardcare

Source: CCDC 2025a.

Tables 3.3-6 to **Table 3.3-9** include an inventory of businesses in Ear Falls engaged in the retail trade, accommodation and food services, construction (i.e., general contractors and specialty trade contractors), personal services (i.e., accounting, legal, and financial services), and arts, entertainment, and recreation sectors. Some businesses operate across multiple sectors, which may result in double counting.

Ear Falls has a limited number of restaurants and retail stores and services. This presents an opportunity for businesses in the Municipality of Red Lake to expand offerings to capture a larger share of the Red Lake trade area spending, from the residents of Ear Falls.

Table 3.3-6: Township of Ear Falls Accommodation and Food Service Businesses

Business Type	Businesses	
Accommodations Hotel, motel, room and board services, apartment rentals, or bed & breakfast.	• Aspen Place Apartments • The Driftwood Inn • Kahooter's Kabins & RV Park	• Pine Ridge Campground • Trillium Motel & Restaurant
Food stores Grocery, wholesale, catering, convenience stores, and liquor stores.	• Coulson's Corner • Dutchie's General Store • Flying Wild Rice Co. • Grasley's Ontario Birch Syrup	• KD's Fine Foods • The Pit Stop • Sweet Designs by Ange • LCBO
Restaurants Sit down eating and fast food.	• The Driftwood Inn • Fella's Sports Lounge • Fella's Kitchen • Hole-In-One (seasonal)	• Leslie's Café and Bistro • Trillium Motel & Restaurant • The Whiskey Jack

Source: CCDC 2025b; Ear Falls 2025a.

Table 3.3-7: Township of Ear Falls Retail Trade Businesses

Business Type	Businesses	
Retail stores and services	• CBC - FM Radio • CKDR - FM Radio • D&E Minnows • DNR Delivery Inc. • Down Home Celebrations 365 • Envy Hair Space • Four Seasons Sport Shop • Haley's Sugar Shack • Jennifer Nagorski • Kahooter's Laundromat	• LCBO • Nestie's Hair Studio • Northwest Building Supplies • Pampered By Tania • Pearson Auto & Sport • Pooches Paradise • Purolator Courier • Shaw Cable • Stems 'N Such • TBAYtel • U-Haul • West End Cannabis Co.

Source: CCDC 2025b.

Table 3.3-8: Township of Ear Falls Arts, Entertainment, and Recreation Businesses

Business Type	Businesses	
Recreation services	• Britney Kay Fitness • Ear Falls and District Museum • Ear Falls Golf & Country Club • Ear Falls Lion's Club • Ear Falls Minor Hockey • Ear Falls Recreation Center • Ear Falls Skating Club • Green Thumbs Club • Girl Guides of Canada	• Gun Club • Lion's Club • Royal Canadian Legion Ladies Auxiliary • Pakwash Provincial Park • Royal Canadian Legion Branch 238 • Scouts Canada • Silver Birch Stables • Trout Forest Music Festival • Whispering Pines Seniors Centre

Source: CCDC 2025b; Ear Falls 2025b.

Table 3.3-9: Township of Ear Falls Construction and Personal Service Businesses

Business Type	Businesses	
Personal services and pharmaceuticals Pharmacy, legal, accounting, and financial services.	• Account On Me WP • APB Bookkeeping • Davis Tax Preparation • E. Ross, Income Tax Service • Ear Falls Pharmacy • Ericksons LLP	• IG Wealth • Keeping North West • Shewchuk, Ormiston LLP • SureTax • Thiessen Bookkeeping • Trevor Zhukrovsky LLB
Contractor services	• 105 Mechanical • Account On Me WP • Bill Burdeney Carpentry • Chukuni Sanitation • Colin Watson • D. McGrath Plumbing Inc. • English R. Home Improvements • Eric Ellis • G.S Gas Service	• Larocque Enterprises • Mountain Woodworks • Northwest Seamless Gutter • Over the Top Construction • Pace Builders • Paint Me Perfect/Painting • Samson's Services • SLS Simmons Logic Solutions

Source: CCDC 2025b.

Tables 3.3-10 includes an inventory of prominent businesses in the First Nations communities within the Red Lake trade area. Some businesses operate across multiple sectors, which may result in double counting.

The First Nation communities in the Red Lake trade area have a limited number of restaurants and retail stores and services. Local stakeholders noted that many people from nearby First

Nation communities visit the Municipality of Red Lake to purchase food and retail goods and services (Stakeholder Interview Program 2025). This presents an opportunity to expand local offerings to better meet the needs of these visitors and capture additional spending in the Municipality of Red Lake.

Table 3.3-10: First Nations Communities Businesses

Business Type	Businesses	
Accommodations Hotel, motel, room and board services, apartment rentals, or bed & breakfast.	**Pikangikum First Nation** • Pikangikum Safe House-Hotel • Pikangikum Hotel **Poplar Hill First Nation** • Poplar Hill Motel	**North Spirit First Nation** • North Spirit Lake Lodge **Sandy Lake First Nation** • Sandy Lake Motel
Retail stores and services & food stores and restaurants Grocery, wholesale, catering, convenience stores, and liquor stores.	**Pikangikum First Nation** • Kejicks Store • KFC • Northern Store • Pikangikum Restaurant • Tim Hortons **Deer Lake First Nation** • Northern Store **Poplar Hill First Nation** • Northern Store **Keewaywin First Nation** • Northern Store **North Spirit First Nation** • Da Store • Mamaskatch Meejims • North Spirit Lake Lodge	**Sandy Lake First Nation** • Adowgamick Enterprises • Dan-Dans Store • Marci's Variety Store Seasonal Fishing Tackle • Northern Stores Inc. • Northern Stores Warehouse/Gas Station • Sandy Lake Gas Station • Sandy Lake Fuel Services • Seaplane Store • TNN's Convenience Store • Walter's Place

Source: Google Maps 2025a, 2025b; North Spirit Lake First Nation 2025; The Northwest Company 2025; Poplar Hill First Nation 2025; Sandy Lake First Nation 2025.

3.4 RETAIL-COMMERCIAL SUPPLY GAPS

This section outlines the retail-commercial supply gaps identified through the supply analysis of employment by industry sectors, household spending on retail-commercial products or services, and inventories of prominent retail-commercial businesses in the Red Lake trade area. These findings were further supported through local findings from the stakeholder interview program, business survey, and stakeholder engagement.

Supply gaps refer to the types of businesses that, at times, are unable to fully meet customer demand. Supply gaps may be due to labour force shortages, limited availability of goods or services, or a lack of variety of the products offered, among others.

Table 3.4-1 shows the retail-commercial supply gaps identified for the Municipality of Red Lake. Supply gaps were identified for businesses offering accommodations, food and catering, retail goods and services, recreation services, and contractor services.

Table 3.4-1: Municipality of Red Lake Retail-Commercial Supply Gaps

Business Offerings	Supply Gaps
Accommodations	• Additional accommodations for tourism • Short, mid, and long-term housing options for workers
Food and catering	• Full-service restaurant options • Grab and go restaurant options • Catering • Grocery
Retail	• Clothing options • Sports supplies and equipment • Furniture and appliance retailer • Electronics and tech supply • General/discount stores • Auto repair
Recreation services	• Paid recreation services (e.g., guided tours, indoor/outdoor recreation services) • Cultural and entertainment services (e.g., movie theatre, youth/senior community spaces, arts/cultural spaces)
Contractor services	• General and speciality services and trades

Accommodations in the Municipality of Red Lake experience high occupancy rates, largely due to the presence of workers at nearby mining and construction sites. As a result, room availability can be limited during the summer months. Stakeholders expressed a need for more housing options for workers—particularly budget-friendly accommodations and rooms with kitchenettes—as well as additional lodging to support tourism (Stakeholder Interview Program 2025).

Gaps in retail-commercial supply were identified through the supply analysis and supported by insights gained from the stakeholder interview program and through engagement. Stakeholders identified a need for more restaurant establishments, caterings options, and an additional smaller grocery store. Currently, the Municipality has two grocery stores, but some products are unavailable due to high customer traffic. Concerns were also raised about the limited hours of the Red Lake IGA, where residents must travel to Balmertown for groceries during weekday evenings (Stakeholder Interview Program 2025).

Retail and paid recreation services in the Municipality are limited. Since the closure of Warehouse One in 2024, only a few clothing stores remain (Stakeholder Interview Program 2025). While the Municipality does have several auto repair shops and contractors in the Municipality, wait times can extend to several months. The wait time for contractor services is due to several reasons including the high demand from the local mining industry (Stakeholder Interview Program 2025), a shortage of skilled trades workers, and low rate of business ownership in northwestern Ontario (Conference Board of Canada 2025).

Businesses in the Municipality of Red Lake also face challenges with finding employees to fill low-wage positions, like those in the food and accommodations and retail sectors (Business Survey 2024; Stakeholder Interview Program 2025). These sectors struggle with attracting and retaining employees due to challenges with competing with the wages and benefits offered by the local mines and positions with the Municipality. Many employers in these sectors rely on the Federal Temporary Foreign Worker Program to fill positions. This program is intended to address labour force shortages by filling jobs with foreign workers where qualified Canadians are not available. Given the low unemployment rate (5% in 2024) and high participation rate (65% in 2024) in the Municipality, this program is integral to the local business community and sustaining economic growth in the community (Environics 2024). Challenges with filling lower wage positions have been exasperated recently with reductions to the proportion of temporary foreign workers allowed at a single business from 20% to 10% (Employment and Social Development Canada 2025). The Municipality of Red Lake has responded to these legislative changes by collaborating with multiple regional organizations, municipalities, and Chamber of Commerce to propose increases to the Ontario Immigrant Nominee Program for Northern Ontario from about 100-200 nominees to 3,000 nominees to address labour supply challenges across Northern Ontario and foster economic growth in the region (Municipality of Red Lake 2025). Currently, most businesses in the Municipality have not utilized the Ontario Immigrant Nominee Program due to the low number of nominees allocated for the region.

4.0 RETAIL-COMMERCIAL DEMAND ANALYSIS

This section presents the demand analysis for retail-commercial businesses in the Municipality of Red Lake, based on identified supply gaps (**Section 3.4**), stakeholder interviews and engagement, and local perspectives. The analysis highlights where demand is strongest—and underutilized—and provides direction for where new investment, business expansion, and service enhancements could yield the greatest benefit in the Municipality. The focus is on the achievable market share for Red Lake within its trade area and the untapped spending potential of non-local visitors—particularly tourists, transient workers, and business travelers connected to the mining and infrastructure sectors. These visitors represent a consistent and often underleveraged market segment.

Three case studies were prepared to highlight how mining or all-season road development has resulted in an increase to the local and transient population and labour force to understand the potential impacts on the retail sector. Best practices are offered for strategies used to respond to changing retail demands including diversification of the economy through investments in the retail and cultural industries, investments in businesses which offer goods or services to seniors, and beautification of the core business area to improve attractiveness to investors and residents. These strategies offer relevant guidance for Red Lake as it plans for sustained growth. More information on the case studies is provided in **Appendix B**.

4.1 ACHIEVABLE MARKET SHARES AND NET ANNUAL SALES BY INDUSTRY

The Municipality of Red Lake currently captures about one third of the retail and commercial spending generated by its trade area. Residents may shop outside of the Municipality or online, and spending by visitors—including those tied to mining, tourism, and regional services—is underleveraged. A portion of spending continues to 'leak' out to other communities or to online retailers. While total sales volumes are anticipated to rise with the expected population growth as a result of the mining developments and road project, there is significant untapped demand that could be captured through new businesses, expanded services, and strategic retail development.

By improving local offerings, increasing service coverage, and enhancing Red Lake's ability to retain resident and visitor spending, the community could raise its total retail-commercial sales from $94 million in 2024 to up to $209 million by 2037—more than doubling current volumes.

This represents a substantial opportunity for local entrepreneurs, outside investors, and the Municipality to support economic development, reduce retail leakage, and meet the growing needs of both residents and regional visitors.

Annual household expenditures by retail-commercial categories for the Red Lake trade area from **Section 3.2**, was used to derive the achievable market shares and net annual sales by industry. The demand analysis was completed to ascertain more precisely the need for specific retail-commercial product or service offerings within the Municipality. To accomplish this, assumptions were developed for the Municipality's achievable market shares through the analysis of total household expenditures by the Red Lake trade area, similar studies completed for comparable Municipalities, and the Municipality's business inventory. This analysis was supported by local perspectives through a business survey, stakeholder interviews, and engagement, and through professional judgement. The achievable market shares for each retail-commercial spending category were then used to estimate the potential retail-commercial demand, based on the Municipality's net annual sales by industry. To calculate the achievable market shares, assumptions were made about the proportion of spending attributed to:

- Spending within the Municipality of Red Lake by visitors from outside the Red Lake trade area;
- E-commerce purchases by residents of the Municipality of Red Lake; and
- Shopping conducted outside of the Municipality of Red Lake by trade area residents.

Non-local spending by visitors is particularly relevant for accommodations, food, and recreational services—and included in the calculation of the net annual sales by retail-commercial categories. Retail demand analysis for accommodations focused solely on short-term accommodations; and did not include estimates for long-term accommodations or those provided by outfitter and fishing lodges. Lodges are typically located outside the Municipal boundaries and therefore excluded from the analysis. Long-term accommodations were also excluded to maintain a focus on market demand generated by short-term visitors, such as tourists and business travelers.

Non-local spending on contractor services is primarily from residents of nearby communities and outside of the Red Lake trade but within northwest Ontario. Data is only available for purchases by households and the total demand for contractor services does not include spending by commercial or industrial customers, aligning with the demand calculations for the other retail-commercial categories by focusing on the demand by individuals or households.

4.1.1 Non-local Spending in the Municipality of Red Lake

Most of the demand for retail and commercial goods and services are captured within the Red Lake trade area. However, there are additional inflows of spending from non-locals, such as tourists, motorists, and transient visitors to the Municipality, who do not reside within the Red Lake trade area. Many of these visitors come for business purposes—such as work related to the mines or regional infrastructure projects—or are tourists who stay briefly before heading to nearby outfitting and fishing camps (Stakeholder Interview Program 2025). Spending by these visitors' accounts for most of these non-local inflows, largely due to the Municipality's remote location, approximately two hours from the Trans-Canada Highway. These visitors are most likely to spend on food and accommodations, and other necessities, driven by both the nature of their stays and relatively higher prices in the Municipality of Red Lake (Stakeholder Interview Program 2025).

Table 4.1-1 presents the non-local spending in the Municipality of Red Lake by retail-commercial spending category for 2024 and 2037. Non-local spending within the Municipality is estimated at 6% of total retail expenditures in the Red Lake trade area, based on the assumption that the inflow of non-local spending corresponds to a proportion of local retail spending.

Estimates of non-local spending were developed using a conservative approach to avoid overstating its impact on the Municipality's economy. These estimates were compared with those used in other studies to ensure consistency. It was assumed that purchases by non-locals were equivalent to a proportion of spending by residents of the trade area.

Specifically, estimates were based on the assumptions that, of the approximately 200 rooms available at accommodations in the Municipality of Red Lake, 75% were occupied. This translates to roughly 100 non-local occupants regularly staying in temporary accommodation and making purchases in the Municipality.

It was also assumed that non-local spending on contractor services and personal services and pharmaceuticals would primarily come from individuals living outside the defined trade area, who access services in the Municipality.

Table 4.1-1: Municipality of Red Lake Non-Local Retail-Commercial Spending, 2024 and 2037

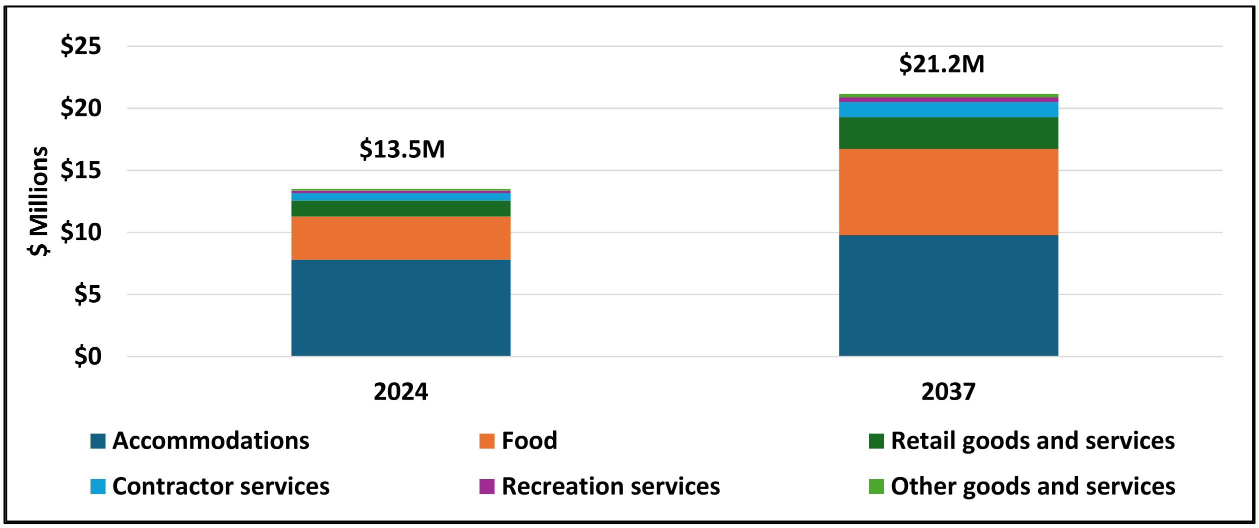
Retail-Commercial Spending Categories	Non-local Inflow Factor (%)[1]	2024 $ Millions	2037 $ Millions
Contractor services			
Contracting and maintenance[2]	5.0%	$0.6	$1.2
Food and accommodations			
Accommodations[3,4]	80.0%	$7.8	$9.8
Food from restaurants[4]	10.0%	$1.8	$3.7
Food from stores and convenience[4] purchases	3.0%	$1.6	$3.3
Retail goods and services			
Furnishing and equipment[4]	0.5%	$0.1	$0.1
Household supplies and operations services[4]	1.0%	$0.2	$0.5
Personal care products[4]	2.0%	$0.2	$0.3
Vehicle purchases and related expenses[4,5]	1.0%	$0.6	$1.2
Clothing[4]	1.0%	$0.1	$0.3
Reading and other printed materials[6]	0.0%	-	-
Recreation supplies and entertainment equipment[4]	1.0%	$0.1	$0.1
Recreation services			
Arts, entertainment, and recreation services[4]	2.0%	$0.2	$0.4
Other goods and services			
Personal services and pharmaceuticals[2]	1.0%	$0.1	$0.3
Total[3,7]	**5.5%**	**$13.5**	**$21.2**

Source: Environics 2024.
Notes:

1. Assumptions and calculations were completed by InterGroup Consultants Ltd. It was assumed that purchases by non-locals were equivalent to a proportion of spending by residents of the trade area. These assumptions were supported by local perspectives gathered through a business survey, stakeholder interviews and engagement, as well as a review of the Municipality's business inventory, similar studies for comparable Municipalities, and professional judgement.
2. It was assumed that contractor services and personal services and pharmaceuticals are typically purchased by residents from nearby communities outside of the Red Lake trade area but within northwestern Ontario. Inflow estimates for contractor services only include purchases by households and exclude commercial or industrial spending.
3. The accommodations inflow factor was assumed to be 80% in 2024, decreasing to 50% in 2037. This reflects the fixed number of accommodations in Red Lake and accounts for the forecasted increases in population and expenditures in the Red Lake trade area. Consequently, the total inflow factor was assumed to decrease from 5.5% 2024 to 4.3% in 2037.
4. Inflow proportions were supported by the assumption that approximately 100 non-local occupants staying in temporary accommodations regularly make purchases within the Municipality.
5. It was assumed that non-locals do not make purchases of recreational or motor vehicles within the Municipality.
6. It was assumed that non-locals do not purchase books, magazines, or newspapers within the Municipality.
7. Totals may not add due to rounding.

Figure 4.1-1 shows the forecasted amount of non-local spending in the Municipality of Red Lake by retail-commercial category in 2024 and 2037. Non-locals were forecasted to spend the most on accommodations, followed by food and retail goods and services. Non-local spending was forecasted to increase from $13.5 million in 2024 to $21.2 million in 2037.

Figure 4.1-1: Municipality of Red Lake Non-Local Spending



Source: Environics 2024.

Notes:

1. Assumptions and calculations were completed by InterGroup Consultants Ltd. It was assumed that purchases by non-locals were equivalent to a proportion of spending by residents of the trade area. These assumptions were supported by local perspectives gathered through a business survey, stakeholder interviews and engagement, as well as a review of the Municipality's business inventory, similar studies for comparable Municipalities, and professional judgement.

Spending on accommodations, food, and retail goods and services was forecasted to account for over 90% of non-local spending in the Municipality in both of 2024 and 2037. The proportion of spending by non-locals on accommodations was assumed to decrease due to the fixed number of lodgings in the Municipality. Increasing the number of accommodations and paid recreation services within the Municipality would support an increase in spending by non-locals in the Municipality. Stakeholders noted that there currently are not enough available accommodations to support the business community and at times there are unavailable rooms during the summer months. Locals felt that the expansion of current accommodations or the attraction of a new hotel/motel to the Municipality should be prioritized as needs are not currently being met and demand is expected to increase as the Great Bear Project begins construction in 2027 (Stakeholder Engagement 2025; Stakeholder Interview Program 2025).

4.1.2 Estimated Market Share of the Red Lake Trade Area

Understanding the Municipality's estimated market share of the Red Lake trade area provides insights into the current local demand for retail-commercial goods and services. This information is valuable for identifying opportunities to enhance the Municipality's capacity to retain local spending. In 2024, it was estimated that 33% of trade area expenditures in these categories occurred at businesses within the Municipality. With expected productivity improvements and the introduction of new retailers and services providers the market share is estimated to increase to 37% in 2037—resulting in higher associated sales volumes within the Municipality.

Estimated market share for the Red Lake trade area considered both e-commerce spending and spending by Red Lake trade area residents outside of the Municipality of Red Lake. The market share was determined using a weighted average of spending within the Municipality of Red Lake by residents of the Red Lake trade area, including the Municipality of Red Lake, the Township of Ear Falls, and the nearby First Nations communities.

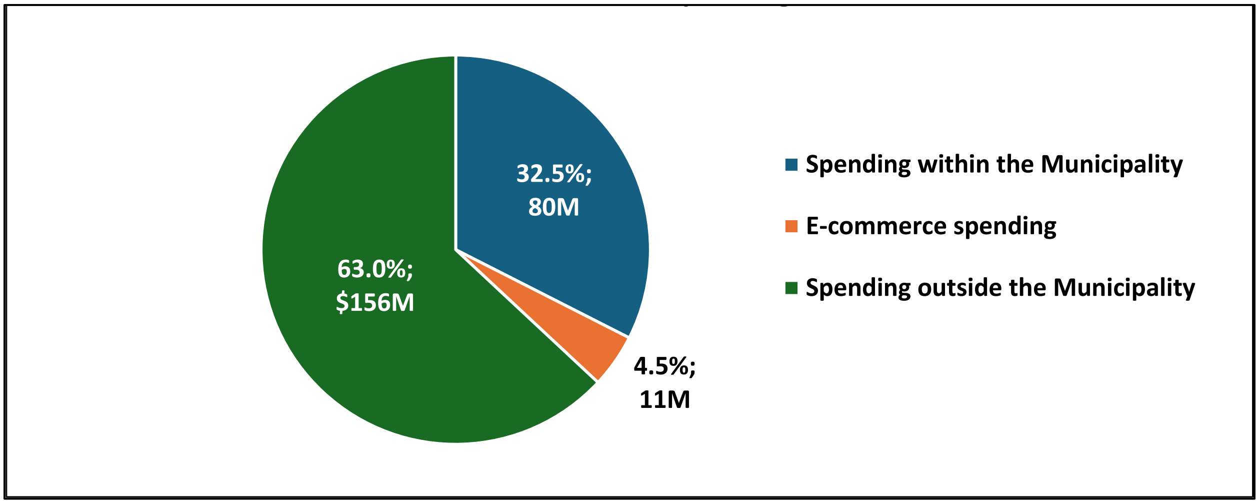
In 2024, retail e-commerce spending in Canada accounted for approximately 6.1% of total retail expenditures (Statistics Canada 2025). This marks a steady increase from 2.9% in 2018, reflecting a growing consumer preference for the convenience of online shopping. To estimate e-commerce spending by retail category for residents of the Municipality of Red Lake, assumptions were made based on the availability of goods or services in the Municipality. A multiplier was applied to the national average (6.1%) to reflect local availability.

The Municipality of Red Lake captured its largest share of local spending for most retail and commercial categories from its own residents, except for accommodations. In this category, the largest share comes from visitors outside of the Red Lake trade area, followed by residents of the trade area First Nations communities. Assumptions were developed for the Municipality's achievable market shares through the analysis of total household expenditures by the Red Lake trade area, similar studies completed for comparable Municipalities, the trade area communities' business inventory, and professional judgement.

It was assumed that residents of Ear Falls spend less than 20% of their annual retail-commercial expenditures in the Municipality of Red Lake, except for contractor services, which depends on the availability of contractors in Ear Falls and nearby communities. For residents of the First Nation communities, the highest proportion of spending was assumed in accommodations, food from stores, contractor services, and household supplies.

Figure 4.1-2 shows how residents of the Red Lake trade area were forecasted to spend their money in 2024. Residents of the Red Lake trade area were forecasted to spend about 33% of their retail-commercial goods or services expenditures in the Municipality of Red Lake.

Figure 4.1-2: Red Lake Trade Area Household Spending Patterns, 2024



Source: Environics 2024.
Notes:
1. Assumptions and calculations were completed by InterGroup Consultants Ltd.
2. The proportion of e-commerce purchases reflects only those made by residents of the Municipality of Red Lake.

Table 4.1-2 shows, as of 2024, the estimated market share for the Red Lake trade area, including through e-commerce purchases by people living in the Municipality and the proportion of spending that occurred outside the Municipality by trade area residents. The Municipality of Red Lake captured the highest share of spending in essential retail and services categories, including:

1. Food from stores;
2. Vehicle purchases and related expenses;
3. Household supplies and operations services;
4. Food from restaurants; and
5. Contractor services.

Table 4.1-2: Red Lake Trade Area Retail-Commercial Estimated Market Share, 2024

Retail-Commercial Spending Categories	E-Commerce Spending (%)[1,2,3]	Spending Outside the Municipality (%)[1]	Trade Area Market Share (%)[1]
Contractor services			
Contracting and maintenance[3]	0.0%	42.8%	57.2%
Food and accommodations			
Accommodations[3]	0.0%	76.0%	24.0%
Food from restaurants[3]	0.0%	56.2%	43.8%
Food from stores and convenience purchases[3]	0.0%	53.7%	46.3%
Retail goods and services			
Furnishing and equipment[4]	9.6%	71.1%	19.2%
Household supplies and operations services[5]	2.7%	50.2%	47.1%
Personal care products	3.1%	42.9%	54.0%
Vehicle purchases and related expenses[6]	9.1%	73.6%	17.3%
Clothing	5.6%	79.0%	15.4%
Reading and other printed materials	4.7%	82.5%	12.8%
Recreation supplies and entertainment equipment[7]	5.2%	75.2%	19.6%
Recreation services			
Arts, entertainment and recreation services[8]	8.1%	76.4%	15.4%
Other goods and services			
Personal services and pharmaceuticals	8.8%	61.8%	29.4%
Total	**4.5%**	**63.1%**	**32.5%**

Source: Environics 2024.

Notes:

1. Assumptions and calculations were completed by InterGroup Consultants Ltd. Market share assumptions for the trade area were based on the analysis of total household expenditures by the Red Lake trade area, local insights, comparable studies completed for similar municipalities, the business inventory of trade area communities, and professional judgement.
2. The proportion of e-commerce purchases reflects only those made by residents of the Municipality of Red Lake. Differentiating between e-commerce and out-of-town spending for other trade area communities was not considered relevant to the analysis.
3. It was assumed that purchase of contractor services, accommodations, or food are typically purchased in person, either within the Municipality or in another community; therefore, no e-commerce purchases were assumed for these categories.
4. Purchases in furnishing and equipment were assumed to be primarily for household-related items such as home hardware, workshop tools, and equipment.
5. Household supplies and operations services includes purchases related to communication services (i.e., cell phones and landlines) and internet services.

6. It was assumed that purchases of vehicles and related expenses consist mainly of maintenance and fuel purchases and infrequent purchases of recreational vehicles (e.g., ATV, bicycles, snowmobiles).
7. Purchases of recreation supplies and entertainment equipment were assumed to be primarily for items such as camping gear, toys, and athletic equipment.
8. Arts, entertainment and recreation services includes of purchases of television services, recreation facility fees, and children's camps fees.

The trade area was estimated to spend 33% of their annual expenditures on retail-commercial goods and services within the Municipality. Trade area residents were projected to spend about 50% of expenses on goods typically purchased at grocery stores—such as food, household supplies, and personal care products—within the Municipality. Other major spending categories within the Municipality included contractor services and food from restaurants.

The analysis of the Municipality's market share highlights opportunities to expand the current retail-commercial offerings in the Municipality—particularly in categories such as furniture and equipment, food (from restaurants and stores), and clothing. Local stakeholders identified these services as having the highest potential for growth. As such, strategies should be developed to expand current businesses or attract new ones that can meet these demands (Stakeholder Engagement 2025).

Currently, the Municipality does not have a dedicated furniture or equipment store. All existing spending in this category is related to household items such as home hardware, workshop tools, and equipment. Establishing a furniture and home appliance store could materially increase local spending in this category.

Since the closure of Warehouse One in 2024, only two clothing stores remain in the Municipality. Stakeholders identified the need for a mid-priced clothing store to meet local demand (Stakeholder Interview Program 2025).

The Municipality currently has three sit-down restaurants. Existing demand is believed to be sufficient to be able to support additional establishments. Moreover, project population growth and an influx of transient workers for planned mining development are expected to further increase demands. Stakeholders noted that a greater variety of sit-down restaurants would be welcomed (Stakeholder Interview Program 2025). Those offering catering services could help drive additional growth in this sector as well.

4.1.3 Retail-Commercial Net Annual Sales Volumes

Understanding net annual sales volumes—actual and forecast—is important because it quantifies the market potential for different retail and service sectors. **Table 4.1-3** presents the net annual sales volume by retail-commercial category projected for 2024 and 2037. The sales volumes include spending by both residents of the Red Lake trade area and non-local visitors. The 2037 forecast assumed no change in market share or inflows.

The demand analysis reflects projected future demand in the Municipality of Red Lake in 2037, based on the achievement of the potential population growth scenario (see **Section 2.1** for more details). It also assumed that current market shares and sales productivity levels are maintained. Under these assumptions, net annual sales volumes are forecasted to double from $93.9 million in 2024 to $181.9 million in 2037.

Table 4.1-3: Municipality of Red Lake Net Annual Sales Volume for Locals and Non-Locals, 2024 and 2037

Retail-Commercial Spending Categories	Trade Area Market Share (%)[1]	2024 Sales Volumes $ Millions[2,3]	2037 Sales Volumes $ Millions[2,3]
Contractor services			
Contracting and maintenance	57.2%	$7.6	$15.2
Food and accommodations			
Accommodations[4]	24.0%	$10.2	$14.5
Food from restaurants	43.8%	$9.9	$19.7
Food from stores and convenience purchases	46.3%	$26.9	$53.9
Retail goods and services			
Furnishing and equipment	19.2%	$2.7	$5.4
Household supplies and operations services	47.1%	$10.9	$21.8
Personal care products	54.0%	$4.6	$9.1
Vehicle purchases and related expenses	17.3%	$11.4	$22.9
Clothing	15.4%	$2.4	$4.8
Reading and other printed materials	12.8%	$0.2	$0.5
Recreation supplies and entertainment equipment	19.6%	$1.1	$2.2
Recreation services			
Arts, entertainment, and recreation Services	15.4%	$1.7	$3.3
Other goods and services			
Personal services and pharmaceuticals	29.4%	$4.4	$8.7
Total[4]	**32.5%**	**$93.9**	**$181.9**

Source: Environics 2024.
Notes:
1. Assumptions and calculations were completed by InterGroup Consultants Ltd. Market share assumptions for the trade area were based on the analysis of total household expenditures by the Red Lake trade area, local insights, comparable studies completed for similar Municipalities, the business inventory of trade area communities, and professional judgement.
2. Totals may not add up due to rounding.
3. Sales volumes includes spending by both locals and non-locals.
4. For non-local spending it was assumed that contractor services are typically purchased by residents from nearby communities outside of the Red Lake trade area but within northwestern Ontario. Sales estimates only include purchases by households and exclude commercial or industrial spending.
5. The accommodations inflow factor was assumed to be 80% in 2024, decreasing to 50% in 2037. This reflects the fixed number of accommodations in Red Lake and accounts for the forecasted increases in population and expenditures in the Red Lake trade area. Consequently, the total inflow factor was assumed to decrease from 5.5% 2024 to 4.3% in 2037.

Demand for retail-commercial services was forecasted to increase from $94 million in 2024 to $182 million in 2037 assuming productivity levels are maintained. The forecasted increase was due to projected growth in population and household incomes. Further increases in demand would require productivity improvements and the entry of new retailers and service providers. **Section 5.0** provides recommendations over the short- and medium-term to support the further increase in projected demand outlined in **Section 4.1.4**.

4.1.4 Potential Retail-Commercial Net Annual Sales Volumes

Improvements in productivity and the entry of new retailers and commercial services providers could lead to increases to market share and higher associated sales volumes within the Municipality. With anticipated population growth over the next 20 years, businesses may expand their storefronts or product offerings, and new businesses may open.

Table 4.1-4 presents a forecast of net annual sales volumes for the Municipality of Red Lake in 2037. The table presents a high-growth scenario for 2037, as increases in local market share and non-local visitor spending driven by expanded service offerings, particularly in accommodations and recreation. The forecast assumed an average 4% increase in the Red Lake trade area market share. It also assumed that the miscellaneous inflow for accommodations will rise back to the 2024 levels of 80% of total trade area spending in this category, reflecting an expected increase in available short-term accommodations. Additionally, a projected increase in paid recreation service offerings was assumed to result in a 5% increase to the market share for that category. Based on these assumptions, net annual sales volumes were forecasted to increase from $181.9 million (in a scenario where market share remains consistent) to $209.1 million, assuming the Municipality grows its trade area market share and attracts greater non-local spending inflows for both accommodations, food, and recreation services.

Table 4.1-4: Municipality of Red Lake Potential Net Annual Sales Volume for Locals and Non-Locals, 2037

Retail-Commercial Spending Categories	Non-local Inflow Factor (%)[1,2]	Trade Area Market Share (%)[1]	2037 Sales Volumes $ Millions[3,4]
Contractor services			
Contracting and maintenance[5]	5.0%	62.2%	$16.4
Food and accommodations			
Accommodations[6,7]	80.0%	25.1%	$20.6
Food from restaurants	10.0%	50.8%	$22.3
Food from stores and convenience purchases	3.0%	51.3%	$59.3
Retail goods and services			
Furnishing and equipment	0.5%	24.2%	$6.8
Household supplies and operations services	1.0%	52.1%	$24.0
Personal care products	2.0%	59.0%	$10.0
Vehicle purchases and related expenses	1.0%	19.3%	$25.4
Clothing	1.0%	22.4%	$6.8
Reading and other printed materials	0.0%	13.8%	$0.5
Recreation supplies and entertainment equipment	1.0%	24.6%	$2.7
Recreation services			
Arts, entertainment, and recreation services	7.0%	19.4%	$5.0
Other goods and services			
Personal services and pharmaceuticals	1.0%	31.4%	$9.3
Total	**5.7%**	**36.6%**	**$209.1**

Source: Environics 2024.

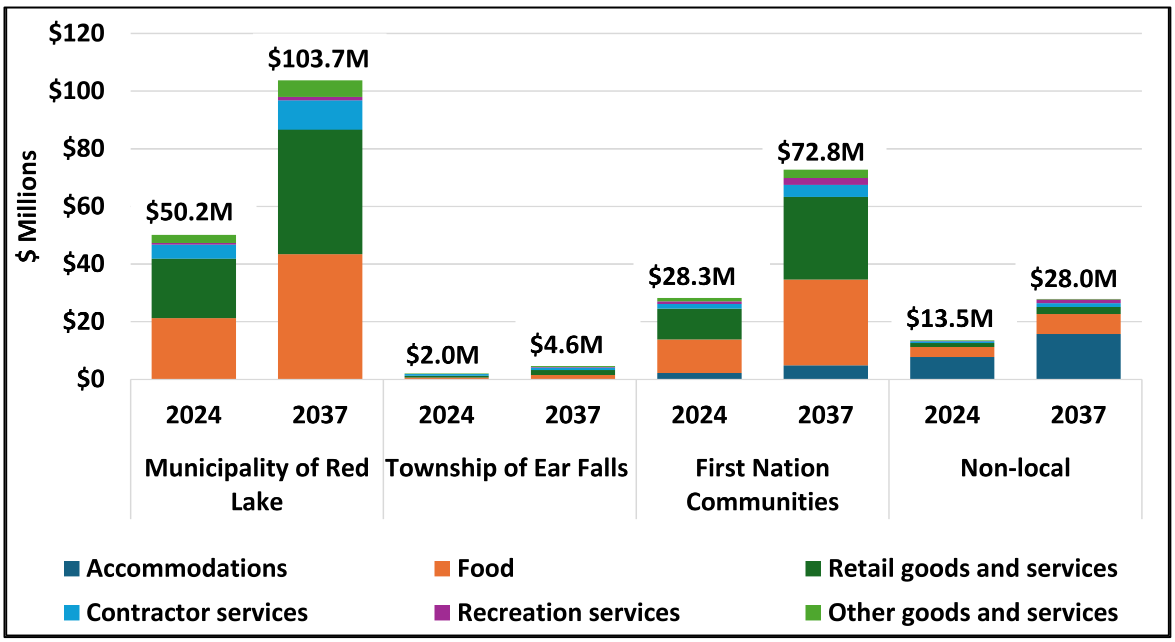
Notes:

1. Calculations were performed by InterGroup Consultants Ltd. It was assumed that purchases by non-locals were equivalent to a proportion of spending by residents of the trade area. It was also assumed that proportions for both market shares and non-local spending were based on the analysis of total household expenditures by the Red Lake trade area, local insights, comparable studies completed for similar Municipalities, the business inventory of trade area communities, and professional judgement.
2. It was assumed that increases to non-local inflows were only for spending on accommodations and recreation services.
3. Totals may not add up due to rounding.
4. Sales volumes includes both local and non-local spending.
5. For non-local spending it was assumed that contractor services are typically purchased by residents from nearby communities outside of the Red Lake trade area but within northwestern Ontario. Sales estimates only include purchases by households and exclude commercial or industrial spending.
6. The accommodations inflow factor was assumed to increase back to 80% in 2037. This reflects an increase in the fixed number of accommodations.
7. Increases to the trade area market share was assumed to be solely due to an increase in purchases by residents of the trade area First Nation communities.

The potential net annual sales volume is projected to grow from $182 million to $209 million in 2037, driven by increases to both the non-local spending inflow factor (from 4% to 6%) and the trade area market share from (33% to 37%). This growth is in addition to expected increases in spending as a result of population and household income growth, would likely require existing businesses in the Municipality to expand their storefronts or offerings—or for new businesses to open.

Figure 4.1-3 shows the forecast net annual sales volumes in the Municipality of Red Lake by both non-locals and residents in the Red Lake trade area in 2024 and 2037. Spending in 2037 assumed an increase in business productivity and the entrant of new businesses within the Municipality. The spending by each region is forecast to more than double by 2037, with the Municipality of Red Lake forecasted to spend over $100 million, followed by the First Nations communities in the Red Lake trade area, were forecasted to spend almost $75 million.

Figure 4.1-3: Municipality of Red Lake Forecast Net Annual Sales Volumes, 2024 and 2037



Source: Environics 2024.
Notes:
1. Calculations were performed by InterGroup Consultants Ltd.

The demand for food and retail goods and services accounted for the largest proportion of local spending in the Municipality. It was forecasted that demand could be about $86 million for residents of the Municipality and $58 million for residents of the First Nation communities in 2037. This emphasizes the need for targeted strategies to increase the Municipality's ability to capture local and regional spending, particularly on food and retail goods and services. Without new or expanded offerings, much of this demand may continue to leak to other communities or online retailers. For non-locals, demand is highest for food and accommodations and projected to be $23 million in 2037. This supports the need for more accommodations to maximize the growth in demand for these sectors.

4.2 RETAIL-COMMERCIAL DEMAND GAPS AND PRIORITY CATEGORIES OF RETAIL POTENTIAL

This section identifies retail-commercial demand gaps and priority business categories in the Municipality of Red Lake. These were informed by the supply and demand analysis (**Section 3.0** and **Section 4.1**), local business and stakeholder perspectives, and regional retail patterns. These findings were further supported through local findings from the stakeholder interview program, stakeholder engagements, and business survey.

Demand gaps refer to the specific goods or services that are either unavailable or insufficient to meet current consumer needs in the Municipality.

Table 4.2-1 shows the retail-commercial demand gaps identified for the Municipality of Red Lake, which are organized by priority areas. Priority was determined through local insights and the demand and supply analysis. Demand gaps were identified for businesses offering accommodations, food services, grocery and essential goods, retail goods and services, automotive, electronics, recreation services, and contractor services.

Table 4.2-1: Municipality of Red Lake Demand Gaps and Priority Categories of Retail Potential

Priority	Target Area
High priority	1. Accommodation including short-term and long-term stays for workers, additional accommodation for tourism and budget-friendly options; 2. Food services including full-service restaurants, grab-and-go, catering; 3. Grocery and essential goods; 4. Retail including clothing, jewelry and furniture/appliances; 5. Automotive services including mechanic shop, small engine repair, heavy equipment repair; and 6. Contractor/trade services including HVAC, carpentry, electrical, etc.
Medium priority	7. Recreation including ecotourism, indoor/outdoor services; and 8. Tech/electronics.
Low priority	9. Arts/culture spaces and services.

The prioritization of business target areas was tested during the targeted stakeholder engagement session and a public open house to gather local insights on which types of businesses have the most market potential. Based on local input, the following three areas were identified as priorities that require short- to medium-term support. This could include assisting existing businesses in expanding their offerings or attracting new businesses to the Municipality for:

- Accommodations;
- Food services; and
- Retail.

Additional target areas identified by locals and stakeholders include automotive services, contractor and trade services, and paid recreation (Stakeholder Engagement Program 2025;

Stakeholder Interview Program 2025). Although several automotive shops and contractors currently operate within the Municipality, stakeholders noted that demand is not being fully met, resulting in extended wait times for services. While these areas are not immediate priorities for short- to medium-term development, it will be important to support existing businesses and to attract new businesses in the future, as well as support population growth.

The limited availability of contractor and automotive services is largely attributed to an ongoing labour shortage of skilled tradespeople. To address this, the Municipality, local education institutions, and major employers—particularly in the mining sector—should collaborate to attract and retain skilled trades workers.

Paid recreation services are also limited in the Municipality. Supporting the expansion of existing recreation businesses or attracting new ones could increase both local and non-local spending. Stakeholders suggested leveraging the area's natural assets through ecotourism activities such as personal watercraft, boat, or paddleboard rentals, as well as guided outdoor tours (Stakeholder Engagement Program 2025; Stakeholder Interview Program 2025). Additionally, there is a recognized need for entertainment venues for all age groups, such as a movie theatre or flexible cultural space capable of hosting concerts, performances, and other events. The Town of Kirkland Lake, Ontario, identified a similar priority—highlighting the community's rich mining history and providing unique Indigenous and cultural experiences to enhance overall well-being and experiences of both locals and non-locals (Town of Kirkland Lake 2024).

With a growing senior population in the Municipality, it will be important to attract and support businesses that offer products or services tailored to this demographic. Stakeholders noted that these services are limited in the Municipality. The Town of Kirkland Lake, Ontario, identified a similar priority in its Economic Development Plan. Their strategy highlighted opportunities for investment in services such as home care, house and pet sitting, property maintenance services, mobile services, and home security (Discover Kirkland Lake n.d.).

4.2.1 Target Business Types

Target business types were identified through the demand analysis and tested during stakeholder engagement sessions and supported through local insights gained through the stakeholder interview program. These are businesses locals felt have the most market potential or current demand is not being met. Accommodations, food services, and retail were identified as the target areas with the most potential and should be prioritized for short- to medium-term support.

Accommodations

Accommodations were identified as a top priority by both residents and local employers, with a critical shortage of available lodging to meet the needs of workers, visitors, and transient contractors. This view was also shared by local stakeholders, with one local employer noting that there are 300 contractors from Australia and there are not currently enough accommodations to support them (Stakeholder Engagement Program 2025; Stakeholder Interview Program 2025). Residents felt that accommodations of all types should be prioritized, including both long- and short-term options, budget friendly options, and rooms with kitchenettes for longer stays. Budget-friendly accommodations and kitchenette-equipped rooms offer added benefits to the community. For example, rooms with kitchenettes allow guests to buy groceries locally, supporting grocery store sales. Similarly, budget-friendly options make it more feasible for visitors—such as those from trade area First Nations communities—to stay in the Municipality or extend their stay, potentially increasing overall spending within the Municipality.

Expanding accommodation options is important to supporting labour force attraction, improving tourism competitiveness, and ensuring the Municipality can benefit from projected increases in non-local spending.

Food Services

There is a demand for more variety of food services—particularly restaurants. Both locals and stakeholders identified the need for more restaurants in the Municipality (Stakeholder Engagement Program 2025; Stakeholder Interview Program 2025). Currently, there are not many available options on Sundays. Stakeholders identified the need for a mid-priced restaurant including local options or a chain/franchise restaurant (Stakeholder Interview Program 2025). It was also noted that more catering options would be welcomed, and restaurants which offer these services could provide further increases to demand.

Improving food service options—especially reliable, sit-down restaurants—can help the Municipality meet current demand, improve quality of life, and boost both visitor and resident spending.

Retail Goods and Services

Current demands for retail goods and services—particularly for clothing and furniture and home appliances are not being met. There is no furniture or home appliance retailer and only two clothing stores in the Municipality. Introducing a mid-priced clothing store and furniture and home appliance would support an increase in demand for the retail goods and services sector within the Municipality. For clothing, both local options or chain stores could be considered such as Winners and Mark's for clothing. Stakeholders also noted the need for clothing stores which offer shoes, children's clothing, and sporting equipment—particularly those for children (Stakeholder Interview Program 2025). North Bay, Ontario, has prioritized the development of their downtown area and waterfront, which has attracted investments into the retail and tourism sectors, such as art galleries, theatres, pubs, and markets within the downtown area (Invest North Bay n.d.). Providing supports to businesses to improve storefronts and the removal of derelict buildings contributes to the beautification of a community and supports investments, improvements to overall community well-being, and attractiveness to visitors. Similarly, Chibougamau, Québec, has prioritized the development of their retail sector—particularly in the town centre—and has contributed to the Town's vibrancy and attracted a variety of businesses which attract and support the local mining companies and their partners (Chibougamau 2021).

Enhancing retail offerings would reduce leakage of household spending, support family and worker needs, and increase the attractiveness of the Municipality for both residents and visitors.

Affordability and Access Considerations

Affordability will be an important consideration when attracting new businesses to the community. While average incomes are relatively high for residents of the Municipality and those employed at the nearby mines, offering mid-priced options would ensure that potential establishments are accessible to a broader range of people. Affordability was a general concern noted by both locals and stakeholders (Stakeholder Engagement Program 2025; Stakeholder Interview Program 2025).

Ensuring new business offerings are affordable and accessible will be key to inclusive economic growth and ensuring all community members—regardless of income—benefit from expanded services.

4.2.2 Potential New Retail Floor Area

The potential new retail floor area was estimated using the projected potential demand outlined in **Section 4.1.4** for target business types identified by both locals and stakeholders. Potential new retail floor area was estimated for illustrative purposes to support the attraction of investments to existing land parcels—particularly for vacant building in the Municipality and those already serviced for development. The demand for retail floor space is forecasted to nearly double for accommodation, clothing, and furniture and home appliances from approximately 105,000 sq. ft. in 2024 to approximately 198,000 sq. ft. by 2037 (an increase of 89 per cent over 2024). Based on the average floor space of existing businesses in the Municipality, there will be enough demand to accommodate each business type.

Accommodations, restaurants, clothing, and furniture and home appliance were identified as the target businesses with the most potential and should be prioritized in the short- to medium-term. The existing floor space area for accommodations, restaurants, and clothing in the Municipality is approximately:

- Accommodations[7] – 70,250 sq. ft.
- Restaurants – 17,500 sq. ft.
- Clothing – 17,250 sq. ft.

There are currently no furniture or home appliance retailers in the community. For the analysis, it was assumed that the demand for spending in this category could be up to 15% of the Red Lake trade area's total annual spending on furniture and home appliances, or about $2.9 million by 2037. The potential demand for accommodations, restaurants, and clothing by 2037 are:

- Accommodations – $16.4 million.
- Restaurants – $22.3 million.
- Clothing – $6.8 million.

[7] The square footage for accommodations does not include Paddle Inn Bed & Breakfast.

Table 4.2-2 shows the projected demand by both locals and non-locals for retail floor space area for accommodations, restaurants, clothing, and furniture and home appliances by 2037. It was assumed that the average $/sq. ft. by business type for clothing and furniture and home appliance stores was equal to 50% the results from the 2018 Centre for Study of Commercial Activity top 100 retailers in Canada (CSCA 2019). The average $/sq. ft. for accommodations and restaurants was calculated using the existing retail floor space area and demand in the Municipality in 2024. It was also assumed that for accommodations, the $/ sq. ft. is 40% higher than estimated. The demand for accommodation, restaurants, clothing, and furniture and home appliance store floor space is forecasted to nearly double from 105,000 sq. ft. in 2024 to 198,000 sq ft. by 2037.

Table 4.2-2: Municipality of Red Lake Projected Retail Floor Area for Priority Businesses by 2037

Business Type	Demand ($Millions)	Average $/sq. ft.[1,2]	Floor Space (sq. ft.)
Accommodations[3]	$16.4	$164/sq. ft.	116,130 sq. ft.
Restaurants	$22.3	$564/sq. ft.	39,496 sq. ft.
Clothing store	$6.8	$229/sq. ft.	29,688 sq. ft.
Furniture and home appliance store	$2.9	$231/sq. ft.	12,601 sq. ft.

Source: CSCA 2019.

Notes:

1. Calculations were performed by InterGroup Consultants Ltd.
2. Assumptions for the average $/sq. ft. is based on the analysis comparable studies completed for similar Municipalities, the Centre for Study of Commercial Activity Retail 100 report, existing $/sq. ft. for accommodations and restaurants, and professional judgement.
3. Square footage data for Paddle Inn Bed & Breakfast was unavailable, so it was excluded from the analysis. The number of rooms was used adjust the assumed demand, and the average $/sq. ft. was calculated based on the resulting demand, excluding the Paddle Inn Bed & Breakfast.

By 2037, there was a projected demand for almost 200,000 sq ft. of retail space for accommodation, restaurants, clothing and furniture and home appliance stores, of which 59% is for accommodations. The net demand after excluding existing floor space area by business type includes:

- Accommodations – 45,880 sq. ft.
- Restaurants – 21,996 sq. ft.
- Clothing – 12,438 sq. ft.
- Furniture – 12,601 sq. ft.

Based on the existing retail floor spaces for businesses in the Municipality, there is demand for at least one additional accommodation, restaurant, clothing store, and furniture store by 2037.

The **Community Capacity Study** identified approximately 127.8 hectares of vacant land zoned for commercial use across the Municipality, the majority of which is located in Red Lake. While much of this land is only partially serviced or not serviced, it presents a strong opportunity to accommodate future retail and service growth. Combined with existing commercial properties—including non-vacant but potentially underutilized sites—this supply provides a foundation for meeting the projected demand for the majority of the additional retail and commercial floor space by 2037, particularly in sectors such as accommodations, restaurants, clothing, and furniture and home appliances.

5.0 RECOMMENDATIONS AND PRIORITIES

The findings from the demographic, supply, and demand analysis highlight opportunities to grow the local economy by strengthening core retail-commercial offerings and addressing gaps in services and workforce capacity. This section outlines strategic recommendations and short- to medium-term priorities to guide future investment, business attraction, and economic development in the Municipality. These recommendations are designed to improve quality of life, retain and grow the population, and enhance the Municipality's role as a regional service hub.

Recommendations and priorities were developed through analyses and supported through insights provided by both locals and stakeholders. The demand analysis and resulting recommendations were also informed by a review of peer municipal case studies. These case studies examined the impacts of mining or all-season road development that led to growth in both local and transient populations and labour forces. The goal was to understand the strategies other municipalities used to grow the retail sector in similar contexts—such as northern and remote community and reliance on the natural resource sector. The case studies identified the importance of community beautification initiatives, cultural and entertainment sector development, targeted investments in niche businesses (e.g., senior services, home décor), and the diversification of the economy beyond the natural resources sector through growth of the retail sector.

5.1 RECOMMENDATIONS

This section outlines a phased approach to implementing the BGA recommendations, balancing short-term needs with resource availability. The priorities focus on the short- to medium-term including the supports and investment attraction needed to help achieve the recommendations outlined in this report. Recommendations are organized by high priority (1-5 years) and medium priority (6-10 years). Lower priority recommendations are also summarized and should be pursued in conjunction with the other recommendations or over a longer period of time (10+ years).

Table 5.1-1 provides a summary of proposed recommendations and actions organized by high, medium, and low priority. The summary provides financial requirements and level of effort. The financial categories and level of effort are illustrative and may vary depending on local context, available resources, and potential for cost-sharing or external funding. Costs and effort were determined through a review of other projects, professional judgement, and local context and input.

The financial categories include:

- Low cost: Actions that can be implemented using existing staff time, minimal funding, or in-kind contributions. The low cost category is approximately $25,000 and under.
- Medium cost: Actions that require moderate investment—such as studies and program development. The medium cost category is approximately $25,000 to $250,000.

- High cost: Actions that involve major capital expenditures, new infrastructure, or long-term financial commitments. The high cost category is approximately $250,000 and over.

The level of effort reflects the complexity, coordination, and time required to implement each recommendation.

- Low-effort: Actions are generally simple to execute, require limited coordination, and can often be undertaken by existing Municipal staff or partners using current resources, tools and processes.
- Medium-effort: Actions may involve multiple stakeholders, additional planning, or temporary increases in staff time or external support.
- High-effort: Actions typically require extensive collaboration, long-term commitment, or new staffing.

Table 5.1-1: Summary of Proposed Recommendations and Actions

Recommendation	Action	Financial Requirement and Effort
High priority recommendations (over the next 1 to 5 years)		
1. Support the development of additional accommodations	Establish an internal accommodation task force led by the CCDC and the Municipal Economic Development Officer to assess accommodation needs, including potential pressures from mining and tourism.	Low cost; Medium-effort
	Continue to support land access and development approvals for the expansion of existing accommodation owners or attraction of new investors.	Medium to high cost; High-effort
2. Expand food service offerings	Explore the potential for a shared kitchen facility using existing assets.	Medium to high cost; Medium to high-effort
	Recruit a full-service and/or grab-and-go (fast casual) restaurant.	Medium to high cost; Medium to high-effort
3. Attract a furniture and home appliance retailer	Pursue a furniture and home appliance partnership with a distributor or co-locate with existing retailers.	Medium cost; Medium-effort
4. Attract a new clothing store to the Municipality	Attract a chain or locally owned clothing store.	Medium cost; Medium-effort
5. Attract more foreign workers	Continue to coordinate with regional organizations to advocate for increases to Ontario Immigrant Nominee Program and enhance labour retention.	Low cost; Medium-effort
6. Attract more skilled trades to the Municipality	Secure the Municipality of Red Lake's representation on the Northwest Training and Adjustment Board to help address skilled trades and training gaps.	Low cost; Medium-effort
	Conduct a Labour Market Needs Assessment and labour retention strategy.	Medium cost; Medium-effort
Medium priority recommendations (over the next 6 to 10 years)		
7. Improve access and labour mobility from northern First Nations communities	Complete a case study and lessons learned following the operation of the Berens River Bridge and Roads project.	Medium cost; Medium-effort
	Initiate the coordination of a discussion or working group with the Province of Ontario, First Nations, and resource developers to advocate for the extension of all-season road access to other First Nations.	Low to medium cost; Medium-effort
8. Establish a regional partnership strategy with Northern First Nations	Build on the Shared Future Agreement and support regional coordination and training led by First Nations.	Low to medium cost; Medium-effort
9. Update the Tourism Marketing Strategic Plan	Expand the Tourism Marketing Strategic Plan to integrate retail promotion and a social media plan.	Medium cost; Medium-effort
Low priority recommendations (over the next 10+ years)		
10. Support businesses offering services for seniors	Conduct a needs assessment to identify service gaps and priority sectors for the aging population.	Medium cost; Medium-effort
11. Provide community beautification initiatives	Apply for Northern Ontario Heritage Fund-Rural Enhancement Program funding and expand grant programs and incentives for community beautification.	Medium cost; Medium-effort

5.2 HIGH PRIORITY (NEXT 1 TO 5 YEARS)

1. Support the development of additional accommodations

Accommodation owners have identified that they are typically at capacity and there are not enough accommodations to meet current demand. With construction for the Great Bear Project expected to begin in 2027, the demand for accommodations is expected to grow through labour and contracting supports, in-migration, and tourism. Expanding accommodations presents an opportunity to capture more local and visitor spending within the Municipality.

A focused review and task force led by the CCDC and the Municipality's Economic Development Officer should be undertaken to assess short-term accommodation needs (e.g., over the next five years). This effort would help estimate the additional number of rooms required to support anticipated mining activity, tourism growth, and other housing pressures. Input from local stakeholders—such as accommodation providers, First Nations, tourism operators, and major project proponents—may be sought, but not required, to inform this assessment. Building on this analysis, the CCDC and the Economic Development Officer can initiate work to identify and attract potential investors or developers interested in expanding local accommodation options.

- **Action**: Establish an internal accommodation task force led by the CCDC and the Municipal Economic Development Officer to assess accommodation needs, including potential pressures from mining and tourism.
- **Financial requirement**: Low cost. Use of existing staff time and Municipal resources with minimal direct expenditures.
- **Level of effort**: Medium-effort. May require coordination with and input from multiple stakeholders with minimal planning and follow-up.

If existing providers express willingness to expand, the Municipality could facilitate land access and support development approvals. Based on a review and comparison to other municipalities, options may include waiving development fees and providing tax credits to support and encourage investment. If gaps remain, efforts should focus on attracting new investors or hotel chains that meet both workforce and tourism needs.

- **Action**: Continue to support land access and development approvals for the expansion of existing accommodation owners or attraction of new investors.
- **Financial requirement**: Medium to high cost. May involve site servicing, infrastructure investment, or financial incentives.
- **Level of effort**: High-effort. May require legal and regulatory processes, cross-departmental work, and engagement with potential investors.

2. Expand food service offerings

Community members identified the need to expand food service offerings in the community. Restaurants—particularly full-service and fast causal options (e.g., chain or franchise restaurant or locally owned equivalents)—were repeatedly identified by locals and stakeholders as a critical gap. Current limited hours (especially on Sundays), lack of dining variety, affordability, and low availability of catering services restricts spending, convenience, and visitor experience.

To support food-based entrepreneurs and community programming, the Municipality could explore the feasibility of a shared-use commercial kitchen using existing licensed facilities (e.g., Cochenour Hall, the Legion) or other underutilized community assets. Such a space could help reduce start-up and operational costs for small-scale food producers, caterers, or seasonal vendors.

Before advancing any capital or program investments, it is recommended that the Municipality and CCDC undertake a review to assess ppotential user demand (e.g., from caterers, event organizers); operational models (e.g., rental co-operative, municipally managed, local partnerships); seasonal considerations and licensing requirements; and financial implications (e.g., capital upgrades, rental revenues, operating costs).

- **Action**: Explore the feasibility of a shared kitchen facility using existing licensed spaces, with a focus on demand, potential users, operational models, and financial viability.
- **Financial requirement**: Medium to high cost. Financial requirement is dependent on facility upgrades, equipment, and management model.
- **Level of effort**: Medium to high-effort. Effort requires an understanding of the facility and operational planning. Stakeholder engagement may also be required.

The Municipality could prioritize the recruitment of chain or mid-priced full-service restaurants and fast casual brands (e.g., chain or franchise restaurant or locally owned equivalents) to address identified gaps in dining variety, affordability, and availability—particularly for shift workers, youth, and families. Limited hours and lack of dining options, especially on Sundays, were frequently cited by residents and stakeholders as a barrier to quality of life and local spending. Targeting downtown Red Lake for these businesses supports core revitalization and reinforces the Municipality’s role as a service hub.

- **Action**: Recruit a full-service and grab-and-go (fast casual) restaurant.
- **Financial requirement**: Medium to high cost. Investor attraction may involve financial incentives, leasing support, and marketing.
- **Level of effort**: Medium to high-effort. May require outreach, engagement, and negotiation with investors.

3. Attract a furniture and home appliance retailer

The absence of local furniture and home appliance retailer options contributes to spending leakage as it forces households to purchase these essentials outside the community or online. Increasing demand for a furniture and home appliance retailer will be driven by new households, mining-related in-migration, and First Nations spending—notably as no furniture or home appliance retailers are located in the First Nations communities near the Municipality.

A local retail option could support low- to mid-income residents, seniors aging in place, and new families, while strengthening the Municipality’s role as a regional retail hub. The Municipality could consider partnerships with regional distributors or co-locating with existing home improvement retailers.

- **Action**: Pursue a furniture and home appliance partnership with a distributor or co-locate with existing retailers.
- **Financial requirement**: Medium cost. Moderate investment to support business attraction and retail expansion and leasing support.
- **Level of effort**: Medium-effort. May involve partnership building and supporting site or lease readiness.

4. Attract a new clothing store to the Municipality

There are currently only two clothing stores in the Municipality. Community members identified the need for more clothing stores, particularly after the recent closure of Warehouse One. The feasibility of a clothing store will depend largely on the relevance and appeal of the products offered. Priority should be given to attracting a store that provides a diverse inventory catering to a broad customer base—including children and youth, seniors, men, and women—as well as practical items such as workwear and sporting equipment. This inclusive approach increases the likelihood of meeting local needs and meeting the needs of First Nations communities where limited clothing store options are provided. This approach will support the long-term viability of a clothing retailer in the Municipality. Further, it increases shopping convenience and retail resilience while improving downtown vitality. Locals noted that existing stores have limited selection, and the closure of Warehouse One left a gap for affordable options. Priority should be given to retail chains or locally owned stores that offer inclusive sizing and price points. A strong clothing retailer supports downtown revitalization, improves convenience, and keeps more spending local.

- **Action**: Attract a chain or locally owned clothing store.
- **Financial requirement**: Medium cost. May require costs related to business recruitment or possible start-up supports, including leasing supports.
- **Level of effort**: Medium-effort. Involves partnership building and supporting site or lease readiness.

5. Continue to attract more foreign workers

Retailers in the Municipality currently experience challenges with labour shortages and retention, particularly as opportunities with the mines are prioritized where higher wages are offered. Businesses in the Municipality rely on foreign workers to fill vacant positions. The Municipality should continue working with regional organizations and other municipalities to propose increases to the Ontario Government Immigrant Nominee Program for Northern Ontario and to support worker integration and retention.

- **Action**: Coordinate with regional organizations to advocate for increases to the Ontario Immigrant Nominee Program to support labour participation and retention.

- **Financial requirement**: Low cost. Primarily advocacy and administrative support with minimal direct spending.
- **Level of effort**: Medium-effort. May involve multi-stakeholder coordination and advocacy but no direct implementation.

6. Attract more skilled trades to the Municipality

The Municipality has a higher rate of post-secondary education, inclusive of apprenticeship, in comparison to the surrounding communities (Ear Falls and the First Nations). There is a shortage of skilled trades peoples throughout northwest Ontario. The shortage reduces the regional labour draw for skilled trades.

The Municipality should seek active representation on the Northwest Training and Adjustment Board to help ensure that Red Lake's skilled trade labour needs and training priorities are reflected in regional workforce development strategies. Participation would allow the Municipality to advocate for local employers, coordinate with training institutions such as Confederation College, and explore partnerships with nearby mines, contractors, and Indigenous communities. This recommendation aligns with broader economic development efforts identified in **Recommendation #7 and #8**.

- **Action**: Secure the Municipality's representation on the Northwest Training and Adjustment Board and actively participate in regional discussions with local employers, contractors, the Province, First Nations, and post-secondary institutions to assess skilled trade gaps and align training efforts.
- **Financial requirement**: Low cost. Minimal funding required to support participation and coordination.
- **Level of effort**: Medium-effort. Involves sustained engagement and strategic advocacy at the regional level.

Complete a Labour Market Needs Assessment to identify trade-specific shortages, barriers to recruitment (e.g., housing, wages, licensing), and targeted solutions such as apprenticeships, financial incentives, and regional attraction strategies. Use active participation and representation on the Northwest Training and Adjustment Board and the Labour Market Needs Assessment to inform a local skilled trades attraction and retention strategy, potentially supported by provincial or federal workforce development funding.

- **Action**: Conduct a Labour Market Needs Assessment and labour retention strategy.
- **Financial requirement**: Medium cost. May involve consultant fees, research, and engagement activities.
- **Level of effort**: Medium-effort. Moderate planning and coordination across various stakeholders (consultants, community engagement) required.

5.3 MEDIUM PRIORITY (OVER THE NEXT 6 TO 10 YEARS)

7. Improve access and labour mobility from northern First Nation communities

Encouraging investments that enhance access from the north to the Municipality would allow residents of northern First Nations to more easily pursue jobs, training, or educational opportunities in the region. These investments could strengthen economic linkages between the Municipality and the First Nations, help address local labour shortages, advance regional economic reconciliation goals, and build long-term resiliency across the Red Lake trade area.

The improved access of Pikangikum First Nation through the all-season Berens River Bridge and Roads Project to the Municipality could serve as a case study with lessons learned to better understand if improved access to the Municipality leads to an increase in labour participation, training opportunities, and educational opportunities. The Municipality could additionally support efforts for access and labour mobility through coordination and cost-sharing of shuttles between the Municipality and Pikangikum First Nation.

- **Action**: Complete a case study and lessons learned on the Berens River Bridge and Roads project.
- **Financial requirement**: Medium cost. Requires costs to complete a study (including potential outsourcing to a consultant) and reporting.
- **Level of effort**: Medium-effort. Requires data gathering and analysis, and reporting.

The Municipality could coordinate a discussion or working group with the Province of Ontario, First Nations, and resource developers to initiate conversations and lobby for an extension of the all-season road from Pikangikum First Nation. All-season extensions to other nearby First Nations, beyond Pikangikum First Nation, would further increase access from the north to the Municipality. Extensions to the all-season road could create additional opportunities with the First Nations for resource development, labour and access to goods and services, which would lead to more spending within the Municipality. This recommendation would be further supported in conjunction with **Recommendation #6 and #8**.

- **Action**: Initiate the coordination of a discussion or working group with the Province of Ontario, First Nations, and resource developers to advocate and lobby for extensions for all-season road access to other First Nations.
- **Financial requirement**: Low to medium cost. Coordination with multiple stakeholders may require low to moderate funding.
- **Level of effort**: Medium-effort. Involves relationship building and sustained coordination with multiple stakeholders.

8. Establish a regional partnership strategy with Northern First Nations

The Berens River Bridge and Roads Project will provide all-season road access for Pikangikum First Nation to the Municipality and improved winter road access for six additional First Nations north of the Municipality. The Municipality has an opportunity to serve as the retail and service hub for the First Nations. The Municipality currently has a Shared Future Agreement with

Pikangikum First Nation (Municipality of Red Lake 2021), which serves as a foundation for broader engagement. Building on this agreement, the Municipality could act as a facilitator—working with other levels of government, Indigenous leadership, and regional partners—to identify shared priorities in areas such as retail, transportation, infrastructure, social services, and other essential services. By supporting regional partnerships, the Municipality can help unlock mutual economic benefits, reduce service and retail duplication, and foster long-term resilience across the trade area.

Additionally, as part of this partnership approach, the Municipality could support discussions with nearby First Nations focused on workforce development, including a regional skills gap and training needs assessment to inform the development of tailored education and training pathways for northern residents. These efforts should be led by First Nations, with the Municipality playing a supportive, coordinating role. Localized training programs would help build skills, improve job retention, and enhance education outcomes in First Nations communities. Stronger workforce linkages would also help address Red Lake's labour shortages in critical sectors, contributing to shared economic prosperity across the region. This recommendation would be further supported in conjunction with **Recommendation #6 and #7**.

- **Action**: Build on the Shared Future Agreement and support regional coordination and training led by First Nations.
- **Financial requirement**: Low to medium cost. Costs may vary based on training delivery and coordination needs, including coordination with multiple stakeholders (various First Nations).
- **Level of effort**: Medium-effort. Multi-party collaboration and regional coordination and planning required.

9. Update the Tourism Marketing Strategic Plan

Tourism continues to grow in the Municipality. The current tourism plan should be reviewed and updated to reflect population growth, regional connectivity improvements (e.g., all-season road) and the evolving needs of residents and visitors. The updated strategic plan should integrate retail promotion, recognizing that shopping, dining, and cultural events are key parts of the visitor experience. The updated plan should include a comprehensive social media plan to enhance the visibility and marketability of tourism and retail businesses across the Municipality.

- **Action**: Expand the Tourism Marketing Strategic Plan to integrate retail promotion and a social media plan.
- **Financial requirement**: Medium cost. Requires costs to engage a marketing consultant/firm.
- **Level of effort**: Medium-effort. Requires coordination with consultant, business sectors and strategy development.

5.4 LOWER PRIORITY (OVER THE NEXT 10+ YEARS)

10. Support businesses offering services for seniors

The Municipality's population is aging, and services are needed to ensure that community members can age in place. The Municipality should develop a targeted strategy to attract or grow businesses that serve the aging population, including those offering home care, personal services (e.g., hair care, transportation), property maintenance, mobile services, and wellness programs. The Municipality could conduct a needs assessment to identify service gaps and priority sectors and offer small business grants or incentives to help start-ups or existing businesses expand into these areas to support the aging population. A vibrant senior services sector supports aging in place, relieves pressure on public services, and boosts local employment.

- **Action**: Conduct a needs assessment to identify service gaps and priority sectors for the aging population.
- **Financial requirement**: Medium cost. May require a consultant or staff-led study with community engagement.
- **Level of effort**: Medium-effort. Requires targeted outreach within the Municipality, analysis, and stakeholder validation.

11. Provide community beautification initiatives

Community beautification improves quality of life and encourages residents to stay, shop, and invest in the community. Attractive public and private spaces contribute to a vibrant commercial core, enhanced visitor experience, and reinforces Red Lake's role as a welcoming and livable retail hub. Community beautification initiatives include the removal, renovation, or maintenance of derelict buildings, providing grants for storefront renovations, and improvements to public and private spaces. These efforts enhance the appeal of the community to investors. Additionally, developing the core business area improves the attractiveness of the community, supports retail sector growth, enhances residents' well-being, and makes the community more appealing to visitors. The Municipality could support these efforts by applying to the Northern Ontario Heritage Fund – Rural Enhancement Program to prioritize capital projects which contribute to community beautification initiatives.

The Municipality could look to peer municipalities such as the City of North Bay and Town of Kirkland Lake as models. Both communities have implemented a range of grants and incentives for developers and business owners to attract investments and encourage beautification on private properties (J.L. Richards 2019; North Bay 2024). While the Municipality currently offers similar programs, it could consider increasing support for incentives that enhance the vibrancy of the core business areas. For example, the City of North Bay provides grants for public art, sidewalk patios, and municipal development fees—options the Municipality could also adopt (North Bay 2024).

- **Action**: Apply for Northern Ontario Heritage Fund-Rural Enhancement Program funding and expand grant programs and incentives for community beautification.

- **Financial requirement**: Medium cost. Coordination for program funding, grant delivery, and potential matching funds.
- **Level of effort**: Medium effort. May require application development, program administration, and promotional work.

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APPENDIX A:

Municipality of Red Lake Population Projections

APPENDIX A: MUNICIPALITY OF RED LAKE POPULATION PROJECTIONS

The following summarizes population projections prepared by InterGroup Consultants (InterGroup) for the Chukuni Communities Development Corporation (CCDC) and the Municipality of Red Lake. It consolidates information from publicly available sources on regional mining and road development projects as well as comparable population trends in other Ontario municipalities and regions. These population projections will support the Community Capacity Study, which will assess the Municipality of Red Lake's potential to accommodate population growth, considering current and anticipated constraints in infrastructure, facilities, and services. The following focuses exclusively on population projections and does not address the broader implications for community capacity.

A1 INTRODUCTION

Population projections were completed for the Municipality of Red Lake (Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen) for a 20-year period from 2025-2045. InterGroup reviewed existing population projections for the Province of Ontario, northwest Ontario, and other communities within northern Ontario to understand comparable assumptions. Details on these other population projections and their underlying assumptions are provided in **Attachment A1.**

The baseline population projection model used an age cohort survival method with Statistics Canada 2021 Census as the baseline. The age cohort survival method is used by the Ontario Ministry of Finance and Statistics Canada for developing population projections. This approach forecasts year-over-year population change from the base year, projecting births, deaths, and migration by age and gender. These forecasts rely on past trends adjusted for potential future changes. The population projections document potential population changes without and with the referenced mining and road development projects, which include existing operations (Evolution Mine) and planned operations (West Red Lake Gold, Great Bear Project – Kinross Gold, PAK Lithium Project - Frontier Lithium, and the Berens River Bridge and Roads Project). The baseline population projection scenario includes existing mining and road development projects (i.e., Evolution Mine), and the potential growth population projection scenario includes the referenced existing and planned mining and road development projects. Additional information on the approach used and assumptions for the referenced mining and road development projects are provided in **Attachment A2**. For illustrative purposes, the projections for the Municipality of Red Lake were further disaggregated by community (i.e., Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen) to support the municipal infrastructure and services assessment and are provided in **Attachment A3**.

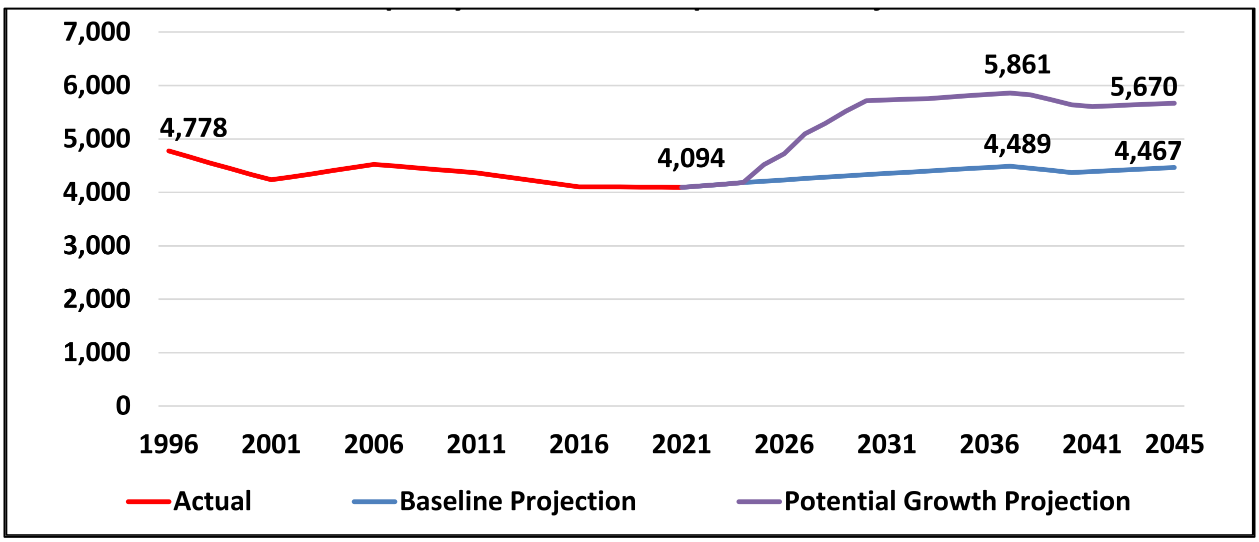
A2 POPULATION PROJECTIONS FOR THE MUNICIPALITY OF RED LAKE

Two scenarios were developed to project the potential range of population change as a factor of changes in overall economic conditions. The two scenarios include:

- The **baseline projection** used an age cohort survival method that projects an increase in population for the Municipality of Red Lake. The projection includes the change in population from existing operations (Evolution Mine) and documents the potential population change without the planned referenced mining and road development projects. The model utilized the fertility rates, net migration rates, and death rates assumptions used by the Ontario Ministry of Finance for their population projections for the Kenora District Census Division.
- The **potential growth projection** used the age cohort survival method from the baseline projection and included the incremental additions of in-migration from the planned mining and road development projects. This projection reflects a maximum upper bound of population growth associated with known resource development and infrastructure projects.

Figure A1 shows the results for the baseline and potential growth projection from 2022 to 2045 and the historical population for the Municipality of Red Lake from 1996 to 2021.

Figure A1: Red Lake Actual Population from 1996-2021 and Baseline and Potential Growth Projections from 2022-2045



Sources: Ontario Ministry of Finance 2024; Statistics Canada 2002, 2007, 2012, 2017, 2022, 2024.
Notes: Projections for the Municipality of Red Lake were prepared by InterGroup Consultants Ltd.

The population in the Municipality of Red Lake was 4,094 people in 2021 (Statistics Canada 2022). The population decreased from 4,778 in 1996 to 4,094 in 2021 (or by 684 people at an average annual rate of change of -0.62%) (Statistics Canada 2002, 2022). Since 2001, the median age has remained relatively constant, increasing from 37.0 years in 2001 to 38.4 years in 2021.

In summary, the results of **Figure A1** show:

- **Baseline projection** scenario: the population is projected to increase from 4,094 in 2021 to 4,467 by 2045 (or average annual growth rate of 0.35%); and

- **Potential growth projection**: the population is projected to increase from 4,094 in 2021 to 5,670 by 2045 (or average annual growth rate of 1.37%). Given the closure of some of the referenced mining projects between 2036-2041, the population of the Municipality of Red Lake is projected to peak at 5,861 in 2037 for the potential growth projection.

The population projections reflect a range of potential outcomes accounting for numerous factors affecting population change. To reach a 2045 population between the baseline projection of 4,467 people and the potential growth projection of 5,670 people, in-migration to the Municipality of Red Lake will need to exceed the baseline rates. For this to happen, the referenced mining and road development projects need to be realized with employment opportunities that attract new residents to the Municipality. These projections are within the projected rates for other Ontario municipalities and regions (**Attachment A1**).

Over the projection period a total of 974 people (269 from direct employment, 269 from families, and 436 due to economic job creation) are projected to migrate to the Municipality of Red Lake as a result of the referenced mining and road development projects. Additional details regarding assumptions on employment for the referenced mining and road development projects and the family and economic multipliers are summarized in **Attachment A2**.

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APPENDIX A ATTACHMENT A1: REVIEW OF EXISTING POPULATION PROJECTIONS IN ONTARIO

Existing population projections were reviewed for the Province of Ontario, northwest Ontario, and communities in northern Ontario. Population projections are a useful tool for municipal and regional planning to understand future capacity and needs of municipal services and infrastructure. Assumptions used for other population projections and the range of average annual growth rates were applied to support the development of the Municipality of Red Lake population projections. **Table A1-1** compares the population projections and the average annual growth rates for the Municipality of Red Lake compared to projections reviewed for Ontario, Northwest Ontario, Dryden, Thunder Bay, Sioux Lookout, and Greater Sudbury.

Table A1-1: Population Projections in Ontario

Community	Population Projection	Average Annual Growth Rate
Municipality of Red Lake	2021 - 4,094 2045 - 4,467 to 5,670	0.35% to 1.37%
Ontario	2023 - 15.6 million 2045 - 17.8 to 23.0 million	0.60% to 1.79%
Northwest Ontario	2023 - 248,800 2045 - 275,200	0.46%
Dryden	2021 - 7,388 2041 - 6,658 to 8,536	-0.52% to 1.12%
Thunder Bay	2021 - 108,843 2045 - 108,637 to 124,959	-0.04% to 2.8%
Sioux Lookout	2016 - 5,272 2031 - 6,378	1.3%
City of Greater Sudbury	2021 - 170,210 2051 - 188,510 to 200,000	1.11% to 1.18%

Sources: City of Greater Sudbury 2023; Explorer Solutions 2022; Ontario Ministry of Finance 2024; Sioux Lookout 2021; Statistics Canada 2017, 2022, 2024; Thunder Bay 2022.
Notes: Projections for the Municipality of Red Lake were prepared by InterGroup Consultants Ltd.

Ontario Population Projections

Statistics Canada publishes population projections for Canada and all provinces and territories over the next 25 years; with projections for Canada available for the next 50 years. Similarly, the Ontario Ministry of Finance produces population projections for all 49 Ontario census divisions to 2051. Both projections use 2023 population estimates for Ontario from Statistics Canada released in May 2024 and based on the 2021 Census of Population. The 2023 population estimates include changes in the population to reflect recent trends in fertility, mortality, and migration.

With an estimated population of 15.6 million for Ontario in 2023, the Statistics Canada and Ontario Ministry of Finance population projections range from 17.8 million (or an average annual growth rate of 0.60%) to 23.0 million (or an average annual growth rate of 1.79%) by 2045 (Ontario Ministry of Finance 2024; Statistics Canada 2024).

Northwest Ontario Population Projections

The Ontario Ministry of Finance projects the population for northwest Ontario (i.e., Kenora District, Rainy River District, and Thunder Bay District Census Divisions) to grow from 248,800 in 2023 to 275,200 (or an average annual growth rate of 0.46%) by 2045 (Ontario Ministry of Finance 2024). The Kenora District population is projected to increase from 73,177 in 2023 to 83,345 by 2045 (or an average annual growth rate of 0.59%). Population growth in the Kenora District is expected to occur at a higher rate than the Thunder Bay District and the Rainy River District over the projection period.

The Kenora District Services Board (KDSB) provides essential services for municipalities and the people living in the unincorporated territories within the Kenora District including social services, employment and financial support services, community housing services, childcare, and emergency medical services. Population growth and associated housing demand growth are projected to understand the demand for residential housing in the Kenora District for a twenty-year period (KDSB 2023). The KDSB anticipates economic growth to be driven by mining, forestry, transportation, and manufacturing sectors. Projected population growth due to increased economic activity may range from 12% (or an average annual growth rate of 0.45%) to as high as 40% (or an average annual growth rate of 1.35%) in high economic scenarios by 2045 (KDSB 2022).

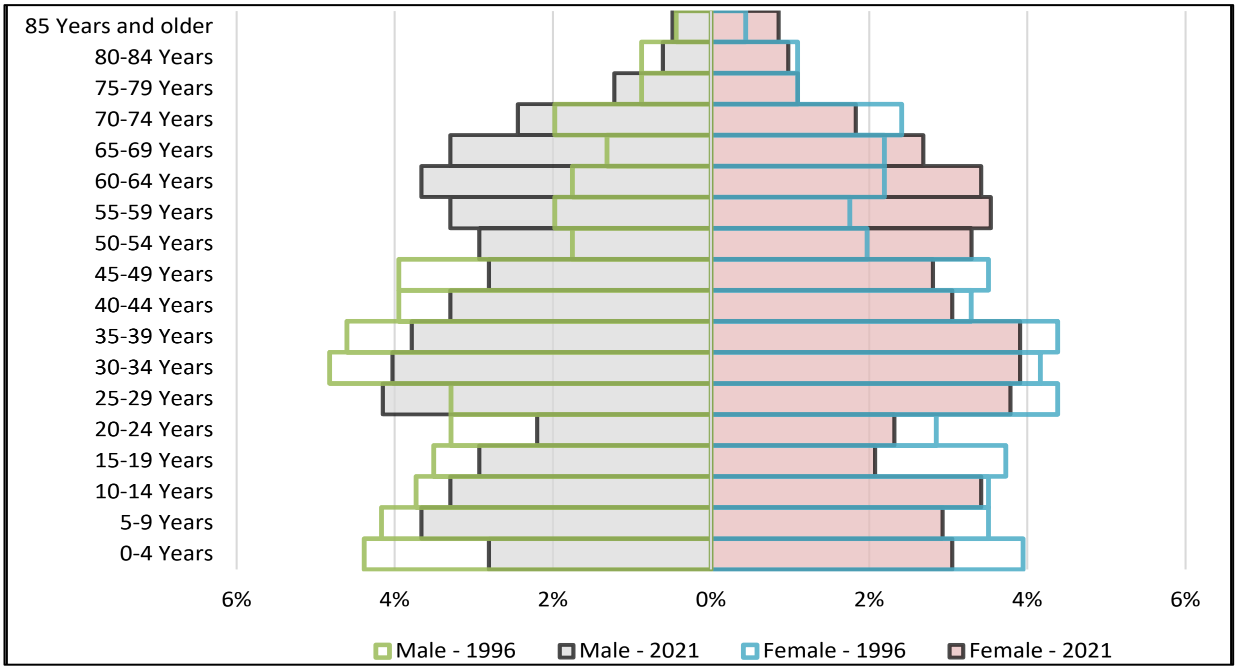
Population Projections for Municipalities in Northern Ontario

Municipality of Red Lake

The population in the Municipality of Red Lake was 4,094 people in 2021 (Statistics Canada 2022). The population decreased from 4,778 in 1996 to 4,094 (or by 684 people at an average annual rate of change of -0.62%) in 2021 (Statistics Canada 2002, 2022). Since 2001, the median age has remained relatively constant, increasing from 37.0 years in 2001 to 38.4 years in 2021.

Figure A1-1 shows the population distribution by age and sex for 1996 and 2021 for the Municipality of Red Lake. The age cohorts are presented along the vertical axis with each block representing the proportion of males or females for the corresponding year. The horizontal axis presents the proportion of the total population with the female population presented on the right side and the male population on the left side. The figure shows a maturing population, with a larger proportion of people 50 years and older and smaller proportion of the population aged 0 to 24 years old in 2021 compared to 1996.

Figure A1-1: Population Age and Sex Distribution for the Municipality of Red Lake, 1996 and 2021



Sources: Statistics Canada 1998, 2022.

In 2011, the Municipality of Red Lake developed population projections which projected between 2,226 (or an average annual growth rate of 2.02%) to 4,553 (or an average annual growth rate of 3.54%) additional residents by 2031 (FoTenn Planning and Urban Design 2011). The projections assumed the population in the Municipality of Red Lake would increase from 4,526 in 2011 to between 6,752 and 9,079 by 2031. The high and low growth scenario assumptions include:

- The high growth scenario projected a population of 6,970 by 2021 compared to the actual population of 4,094 in 2021 (Statistics Canada 2022). The high growth projection assumed five new mines would open by 2031 and higher growth in the highway commercial and proposed industrial park areas (FoTenn Planning and Urban Design 2011).
- The low growth projection assumed existing mines would operate and grow, at least two mines would open by 2031, and lower growth in the highway commercial and proposed industrial park area. The low growth projection assumed the population would increase to about 5,528 by 2031 (based on average annual growth rate of 2.02%) (FoTenn Planning and Urban Design 2011).

The 2011 projections were completed to understand if there was a need to expand the municipal boundaries and were based on mining assumptions that included a range of two to five projected mining operations. The approach and assumptions behind the 2011 projections differ from the 2022-2045 population projections produced by InterGroup.

City of Dryden

In 2022, population projections for Dryden were developed for different growth scenarios for the 2021 to 2041 forecast period. The population projections, the underlying assumptions, and average annual growth rates are summarized in **Table A1-2**. Some of the assumptions used for the projections were utilized in developing the Municipality of Red Lake population projections.

Table A1-2: City of Dryden Population Projections for Various Scenarios

Projection	Assumptions	Average Annual Growth Rate
Historical Dryden Growth Trend	Growth rate is reflective of Dryden's change in population over the previous 20 years.	-0.52%
Regional Growth Trend	Growth rate is based on projections for urban centres in Northern Ontario, including Thunder Bay, City of Kenora, City of Dryden, Municipality of Red Lake, and Sioux Lookout.	0.43%
High Growth (Goliath Gold Complex)	Uses the regional growth trend projection and additional assumptions for the expected gold mine. The mine was estimated to create 450 new jobs, with an expected mine life of 13.5 years. 33% of the jobs would be allocated to newcomers who would move to Dryden; of which 50% would be single persons, 25% would be a family of two, and 25% would be a family of four. This implies a family multiplier of 2.0. A multiplier of 1.32 for indirect jobs and 1.20 for induced jobs were created for each job. This implies an economic multiplier of 1.52. 25% of newcomers who moved to Dryden would move out of the city after the mine closes.	1.12%

Sources: Explorer Solutions 2022.

Thunder Bay, Sioux Lookout, and City of Greater Sudbury

Table A1-3 shows information on population projections that were prepared for Thunder Bay, Sioux Lookout, and Greater Sudbury. The projections for other communities within Ontario are informative for understanding the range of growth rates assumed in population projections.

Table A1-3: Thunder Bay, Sioux Lookout, and the City of Greater Sudbury Population Projections

Community	Population Projection	Average Annual Growth Rate
Thunder Bay	2021 – 108,843 2045 - 108,637 to 124,959	-0.04% to 2.8%
Sioux Lookout	2016 - 5,272 2031 - 6,378	1.3%
City of Greater Sudbury	2021 - 170,210 2051 - 188,510 to 200,000	1.11% to 1.18%

Sources: City of Greater Sudbury 2023; Sioux Lookout 2021; Thunder Bay 2022.

APPENDIX A ATTACHMENT A2: PROJECTIONS APPROACH

Typical drivers of population change are fertility rates, mortality rates, and net migration. These drivers are affected by multiple factors including the age structure of the current population, government initiatives (e.g., programs to promote migration such as the Rural and Northern Immigration Pilot), and economic opportunities. Economic opportunities require consideration of multipliers as the creation of new jobs may generate additional growth. As such, the growth of two sets of multipliers is considered driven by economic opportunities:

- **Family multiplier:** The family multiplier accounts for family members who migrate to the area with their spouses/partners/parents/children. Assumed 50% of migrants will be single persons, 25% will be accompanied by one person (two-person household), and 25% will be accompanied by three people (four-person household) for a total multiplier of 2.0.
- **Economic multiplier**: Private (e.g., retail, accommodation) and public (e.g., health care, educational services) sector jobs are created in response to economic development and the associated increase in population. The economic multipliers were used to estimate the number of additional indirect and induced jobs that are created due to growth in jobs. Assumed an economic multiplier (i.e., indirect and induced job creation) of 1.87 for families migrating with employed persons for the mining and road development projects; 1.73 for gold mining projects; 2.49 for road development projects; and 1.59 for lithium mining projects.

Age Cohort Survival Method

The age cohort survival method projections for the Kenora District Census Division were the starting point for the Municipality of Red Lake population projections. This model was derived from the Ontario Ministry of Finance population projections (Ministry of Finance Ontario 2024). The growth rate was determined by using the fertility rate of females ages 15-49 years old, the observed death rates by age and gender, and net migration rate by Census Divisions. Net migration was disaggregated by immigration, emigration, non-permanent residents, interprovincial migration, and intraprovincial (i.e., movement from one census subdivision to another within a province) migration. Data provided by the Ministry of Finance included:

- Deaths by age and gender;
- Projected number of births by gender; and
- Projected net migration.

Approximations of the fertility rate, death rates, and migration rates by age and gender were obtained for the Kenora District Census Division. Using these calculated values yielded the same results for the projected population by year as the projections published by the Ontario Ministry of Finance for the Kenora District Census Division.

The first step for using the age cohort survival method for the Municipality of Red Lake was to obtain a single age breakdown by gender for municipal residents. This was done by using the population breakdown by single-age in the 2021 Census of Population. The death rate by age and gender, constant fertility rate for women aged 15 to 49, and net migration rate by age and gender derived from the Kenora District projections were used to create the projection for the Municipality of Red Lake. It was assumed that the fertility rate, death rate, and migration rate for the Kenora District would be similar to the Municipality of Red Lake over the projection period.

Economic Assumptions

Population projections for the Municipality of Red Lake require additional economic growth to achieve a population between the baseline projection and the potential growth projection by 2045. For the potential growth projection, InterGroup assumed the West Red Lake Gold, Great Bear Project – Kinross Gold, PAK Lithium Project - Frontier Lithium, Berens River Bridge and Roads Project would become active during the projection period and would generate jobs for people in the Municipality of Red Lake, leading newcomers to migrate into the Municipality to fulfill a portion of the jobs. Information on the Evolution Mine, which is currently operating, is also included as this mine is expected to close during the projection period and is included in both the baseline and potential growth population projection scenarios. The Berens River Bridge and Roads Project is a key infrastructure component that will support the PAK Frontier Lithium Project by providing essential all-season access to transport mined materials. **Table A2-1** summarizes available information for the mining and road development projects including the expected mine life or construction period and labour force inputs.

Table A2-1: Mining and Road Development Projects Expected Life and Labour Force Inputs

Project	Expected Mine Life (Project Timeline)	Labour Force Inputs
Evolution Mine (Currently Operating)	18 years (or until 2040)	• Currently about 610 employees and 340 contractors. Camp size of 280 people. • 70% of employees are local, 10% are Indigenous individuals, and 21% are women.
West Red Lake Gold – Madsen Mine	7 years (2025-2032)	• Recently hired 140 people, and about 60% are local. Will continue to prioritize local hires. Camp size of 115 people. • Average workforce of around 245 people from 2026-2028.
Great Bear Project	12 years (2029-2041) Construction 2027-2029	• Average workforce of about 900 people, with a peak workforce of 1,100 people. • Camp size of 300 people during operations and 600 during construction.
PAK Frontier Lithium	24 years (2027-2051) Construction 2025-2030	• Construction will require a workforce of up to 300 on-site and operations up to 285 on-site. • Assumed a workforce of 400 people during construction and 600 during operations to accommodate shift schedules. Have a camp for construction and camp during operations will accommodate up to 400 people.
Berens River Bridge and Roads Project	2025-2027	• Assumed a construction workforce of 300 people and a camp size of 150 people.

Sources: Berens River Bridge & Roads Project n.d.; BBA and WSP 2023; Evolution Mining 2022, 2023; Pfeiffer et al. 2024; SRK Consulting 2025; West Red Lake Gold 2024a, 2024b.
Notes: Assumptions were prepared by InterGroup Consultants Ltd.

The mining and road development projects will employ people locally and outside of the northwest Ontario region. It was assumed that camps will be fully utilized. For local projects (i.e., Evolution Mine, West Red Lake Gold, and Great Bear Project) camps will accommodate people from outside of the Municipality of Red Lake or northwest Ontario. The following assumptions were made for the workforce age and gender distributions for the referenced mining and road development projects:

- **Workforce** – Assumed all new migrants are people between the ages of 25 to 64 years old.
- **Gender Distribution** – Assumed 70% of new migrants are men and 30% are women. Currently about 20% of employees at Evolution Mine are women. Assumed the referenced mining and road projects will employ a higher proportion of women to meet efforts with increasing representation of women in mining and construction industries.

Table A2-2 summarizes information on the employment and migration assumptions used in the potential growth projection. Assumptions for the currently operating Evolution Mine were also used in the baseline projection scenario.

Table A2-2: Mining and Road Development Projects Employment and Migration Assumptions

Project	Employment and Migration Assumptions
Evolution Mine	• 30% of the people not staying at the camp recently moved to the Municipality of Red Lake (200 people). • 25% of migrants will leave the Municipality of Red Lake when the mine closes (50 people) over the final three years of the project (2038-2040).
West Red Lake Gold – Madsen Mine	• 75% of people not staying at the camp will live in the Municipality of Red Lake (100 people), of which 63% will migrate to Red Lake (85 people) from 2025-2027. • 15% of migrants will leave the Municipality of Red Lake when the mine closes (13 people) around the final years of the project (2031-2033).
Great Bear Project	• 35% of people not staying at the camp will live in the Municipality of Red Lake (105-210 people), of which 30% will migrate to the Municipality during the construction phase (90 people) from 2027-2028 and the operating phase (90 additional people) from 2029-2030. • 25% of migrants will leave the Municipality of Red Lake when the mine closes (45 people) over the final three years of the project (2039-2041).
PAK Frontier Lithium	• Given the remote location all workers will stay at the camp. 20% of people will live in the Municipality of Red Lake, of which 15% will migrate to the Municipality during the construction phase (67 people) from 2025-2027 and operations (23 additional people) phase from 2028-2029. • No migration of people leaving the Municipality of Red Lake were forecasted given the mine is expected to close in 2051, which is after the projection period.
Berens River Bridge and Roads Project	• Given the remote location, 20% of people will live in the Municipality of Red Lake (60 people), of which 10% will migrate to the Municipality in 2025 (30 people). • 25% of migrants will leave the Municipality of Red Lake when the project finishes in 2027 (8 people).

Notes: Assumptions were prepared by InterGroup Consultants Ltd.

Multipliers

The use of multipliers was used to account for the family members who migrate to the area with their spouses/partners/parents/children for the referenced mining and road development projects (i.e., family multiplier) and from more jobs being created due to the increase in economic activity from the creation of new jobs (i.e., economic multiplier).

The assumption for the family multiplier aligns with the assumptions made for the City of Dryden population projections related to the Goliath Gold Project (Explorer Solutions 2022). It was assumed that 50% of migrants will be single persons, 25% will be accompanied by one person (two-person household), and 25% will be accompanied by three people (four-person household); for a total family multiplier of 2.0. The age distribution for migrants from the family multiplier were assumed to range from 0 to 90 years old and would be 50% men and 50% women.

The use of the economic multiplier captures the effect that when there are more available jobs in a region, it will increase the overall purchasing power of the community. Additionally, these jobs may be filled by residents who migrate into the region, which will result in an increased demand for all the services and amenities an individual accesses in their everyday life. This increase in demand and purchasing power incentivises other businesses to expand services to meet the increased demand.

The economic multiplier is derived from the 2019 Statistics Canada Input/Output employment multipliers for Ontario (Statistics Canada 2023). Economic multipliers are typically smaller for smaller geographical areas, and it was assumed that 50% of the indirect and induced employment multipliers for within Ontario would be occur in the Municipality of Red Lake. The following economic multipliers were used in the projections:

- 1.87 for families migrating with employed persons for the referenced mining and road development projects. Uses the total industries multiplier;
- 1.73 for gold mining projects. Used the average of multipliers associated with occupations in support activities for mining; gold and silver ore mining; non-ferrous metal (except aluminum) production and processing; and architecture, engineering, and related services;
- 2.49 for road development projects. Used the average of multipliers associated with occupations in of support activities for transportation; transportation engineering construction; and architecture, engineering, and related services; and
- 1.59 for lithium mining projects. Used the average of multipliers associated with occupations in support activities for mining; other metal ore mining; alumina and aluminum production and processing; and architecture, engineering, and related services.

The economic and family multipliers are assumed to have an interaction where the creation of a job and ensuing migration of the employee with their family to the Municipality of Red Lake (i.e., family multiplier) will generate an increase in demand for private and public services (i.e., economic multiplier). In other words, both the new worker and the additional family members are subject to the economic multiplier. One limitation to the assumption that the family and economic multipliers interact is that it assumes that the new jobs created from the economic multiplier will be resourced exclusively by residents living outside of the Municipality of Red Lake. This creates an upward bias for the number of residents migrating to the Municipality by assuming all new jobs will be filled by residents not currently residing in the Municipality. A more precautionary approach is taken when projecting for growth relative to things like infrastructure, by overestimating demand to ensure that the basic needs of the community can be met.

Table A2-3 shows the assumed direct employment for the referenced mining and road development projects that will be fulfilled by migrants to the Municipality of Red Lake and the associated number of family members and creation of new jobs (and migrants) as a result of the assumed family and economic multipliers. Over the projection period a total of 974 people (269 from direct employment, 269 from families, and 436 due to economic job creation) are projected to migrate to the Municipality as a result of the referenced existing and planned mining and road development projects.

Table A2-3: Mining and Road Development Projects Projected Population Increase

Project	Direct Employment	Family Multiplier	Economic Multiplier
Evolution Mine	0 new migrants 50 people leave Red Lake when the project finishes	50 people leave Red Lake when the project finishes	80 people leave Red Lake when the project finishes
West Red Lake Gold – Madsen Mine	85 new migrants 13 people leave Red Lake when the project finishes	85 new migrants 13 people leave Red Lake when the project finishes	136 new migrants 20 people leave Red Lake when the project finishes
Great Bear Project	180 new migrants 45 people leave Red Lake when the project finishes	180 new migrants 45 people leave Red Lake when the project finishes	287 new migrants 72 people leave Red Lake when the project finishes
PAK Frontier Lithium	90 new migrants	90 new migrants	131 new migrants
Berens River Bridge and Roads Project	30 new migrants 8 people leave Red Lake when the project finishes	30 new migrants 8 people leave Red Lake when the project finishes	71 new migrants 17 people leave Red Lake when the project finishes
Total	385 new migrants 116 leave Red Lake = **269 new residents**	385 new migrants 116 leave Red Lake = **269 new residents**	625 new migrants 189 leave Red Lake = **436 new residents**

Source: Statistics Canada 2023.
Notes: Assumptions were prepared by InterGroup Consultants Ltd.

APPENDIX A ATTACHMENT A3: COMMUNITY-LEVEL POPULATION PROJECTIONS

The population projections for the Municipality of Red Lake were further disaggregated by community (i.e., Red Lake, Balmertown, Cochenour, McKenzie Island, Madsen, and Starratt Olsen) to support the community capacity study. These projections are intended to help identify potential capacity constraints at the community-level. However, population data is not publicly available to complete age cohort survival-based projections for individual communities within the Municipality. Statistics Canada only reports population counts for the Municipality as a whole and does not provide data for all communities, including Balmertown, Cochenour, McKenzie Island, and Starratt Olsen. As a result, community-level projections are provided for illustrative purposes only and rely on multiple data sources, including Statistics Canada and the Chukuni Communities Development Corporation. Given the variability of projections for smaller communities and the assumptions used to estimate the current population for each community, the results should be interpreted with caution.

Table A3-1 provides the population counts assumed for each of the communities based on available information.

Table A3-1: The Municipality of Red Lake Population by Community, 2021[1]

Community	Population	Proportion of Population
Red Lake[2]	1,895	46%
Balmertown[4]	1,246	30%
Cochenour[3]	550	13%
McKenzie Island[3]	150	4%
Madsen[2]	153	4%
Starratt Olsen[4]	100	3%
Total - Municipality of Red Lake	**4,094**	**100%**

Source: Chukuni Communities Development Corporation (CCDC) n.d. Statistics Canada 2023.

Notes:

1. Assumptions were prepared by InterGroup Consultants Ltd.
2. Statistics Canada reported a population of 1,263 for the Red Lake population centre in 2021. This does not include the entire Red Lake community or the surrounding dwellings outside of municipal boundaries which are included in the Municipality of Red Lake population total. To account for this discrepancy, it was assumed that the actual population is 50% higher than reported. The population of Madsen was reported to have 153 people in 2021.
3. The population counts for McKenzie Island and Cochenour were sourced from the CCDC website.
4. Population counts were derived for Balmertown and Starratt Olsen through the review of municipal zoning maps.

Community-level projections were developed by reviewing vacant land parcels allocated for residential development or multi-use development.[8] No data on vacant land was available for Starratt Olsen and due to the size of the community, was not assumed to have any population growth over the projection period.

Table A3-2 shows the proportion of vacant lands available by community and development type.

Table A3-2: The Municipality of Red Lake Proportion of Vacant Lands by Community and Development Type

	Residential	Residential High-Density	Multi-use	Total
Red Lake	55%	7%	19%	81%
Balmertown	5%	0%	10%	15%
Cochenour	0%	0%	1%	1%
McKenzie Island	2%	0%	0%	2%
Madsen	1%	0%	0%	1%
Starratt Olsen	0%	0%	0%	0%
Total	**63%**	**7%**	**30%**	**100%**

Source: Municipality of Red Lake 2025.

Red Lake and Balmertown account for over 95% of vacant land for residential development purposes. Most of the population growth over the projection period is expected to occur in these two communities. Due to the lack of available lands in Cochenour, McKenzie Island, Madsen, only minor amount of growth is expected to occur in these communities.

The community-level projections focus on the needs for 2037 and 2045.[9] In 2037, population and employment are expected to peak as a result of the forecast mining and road development projects. In 2045, projections reflect the end of the projection period.

The following assumptions were used to produce the community-level population projection, aligning with the assumptions used for the vacant land analysis:

[8] Multi-use development land included parcels for some combination of residential and/or residential high-density development and commercial, institutional, industrial, hazard lands, or open space development.

[9] Population projections for the Municipality of Red Lake were developed using the age cohort survival methodology, which relies on population data by age, fertility rates, mortality rates, and net migration. In absence of complete data, InterGroup developed assumptions to disaggregate the Municipality's projected population for 2037 and 2045. These community-level projections are intended for illustrative purposes only. Given the variability of projections for smaller communities and the assumptions used to estimate the current population for each community, the results should be interpreted with caution. Smaller communities are particularly sensitive to minor population changes and projections for these communities should be interpreted accordingly.

1. The baseline growth projection assumes an average annual growth rate of 0.6% from 2021 to 2037 and an average annual growth rate of -0.1% from 2037 to 2045 for Red Lake, Balmertown, Cochenour, McKenzie Island, and Madsen. No data on vacant land was available for Starratt Olsen and due to the size of the community, was not assumed to have any population growth over the projection period.
2. The potential growth scenario assumed any additional growth beyond the baseline growth scenario will primarily occur in Red Lake or Balmertown, due to the lack of vacant lands in other communities.
   i. Residential high-density lands are concentrated in Red Lake and account for less than 100 dwellings over the projections period.
   ii. Multi-use development was assumed to accommodate 11.1 households per hectare, where residential uses are permitted.
   iii. The number of persons per household is assumed to be 2.0 for new development.
   iv. Some development was assumed to occur on multi-use development lands, with 3% of available vacant multi-use development lands in Red Lake (22 dwellings or 44 people) and 2% in Balmertown (14 dwellings or 28 people) assumed to accommodate residential development.

Table A3-3 shows the existing population in 2021 and community-level projections for 2037 and 2045, which are provided for illustrative purposes given data limitations (lack of publicly available population counts for individual communities) and development assumptions.

Table A3-3: Illustrative Community-Level Population Projections for the Municipality of Red Lake, 2021, 2037, and 2045[1,2]

	Actual	Baseline Projection		Potential Growth Projection	
	2021	2037	2045	2037	2045
Red Lake	1,895	2,082	2,072	3,337	3,169
Balmertown	1,246	1,369	1,362	1,486	1,468
Cochenour	550	605	602	605	602
McKenzie Island	150	165	164	165	164
Madsen	153	168	167	168	167
Starratt Olsen	100	100	100	100	100
Total	**4,094**	**4,489**	**4,467**	**5,861**	**5,670**

Notes:
1. Population projections were prepared by InterGroup Consultants Ltd.
2. Results should be interpreted with caution due the variability of projections for smaller communities and the assumptions used to estimate the current population for each community in the absence of available data. Smaller communities are particularly sensitive to minor population changes and projections for these communities should be interpreted accordingly.

The community-level projections indicate that most of the growth is expected to occur in Red Lake over the projection period. Balmertown and Cochenour are projected to experience growth, while Madsen, McKenzie Island, and Starratt Olsen are projected to experience slight increases or no change in the population.

APPENDIX B:

Case Study of Peer Municipalities

APPENDIX B: CASE STUDY OF PEER MUNICIPALITIES

B1 INTRODUCTION

Three case studies were prepared to highlight how the impacts mining or all-season road development has resulted in an increase to the local and transient population and labour force to understand the potential impacts on the retail sector. Best practices are offered for strategies used to respond to changing retail demands including diversification of the economy through investments in the retail and cultural industries, investments in businesses which offer goods or services to seniors, and beautification of the core business area to improve attractiveness to investors and residents.

The peer communities selected each have a large workforce engaged in the mining industry, whether through support services or exploration. The following criteria were used for selecting the peer communities:

- Mining or all-season road development projects had an impact on the economy.
- Mining or all-season road development projects occurred in the last 30 years or continue to serve key industry in the community.
- The communities are large enough that there is publicly available information.

The three peer communities selected were:

1. Kirkland Lake, Ontario.
2. North Bay, Ontario.
3. Chibougamau, Quebec.

Kirkland Lake and Chibougamau are historic mining towns, similar to Red Lake, and have faced similar challenges with diversifying the economy beyond the mining sector. North Bay does not have the same history with mining as Red Lake or the other peer communities, but plays a vital role in the mining service and support sector, being strategically located nearby Sudbury and other mining communities and having access to a network of highways, rail companies, and air carriers.

B2 KIRKLAND LAKE, ONTARIO

The Town of Kirkland Lake is located within one of the richest gold belts in Canada; the Abitibi Greenstone Belt. The Town is located 15 minutes away from the intersection of the Trans Canada Highways 11 and 66 and 35 minutes from the Ontario Quebec border (Town of Kirkland Lake 2015; Discover Kirkland Lake n.d.a.). The strategic location has provided the community with easy access to markets in Ontario and Quebec and maintain its status as a prolific mining community.

The Town of Kirkland Lake established itself as a known mining community by the 1920’s, and continues to serve as a prominent mining community today. Gold is the primary commodity being mined, but silver copper and molybdenum are also produced (Discover Kirkland Lake n.d.a). There are two operating mines around Kirkland Lake, the Macassa Mine and the Young Davidson Mine, owned and operated by Agnico Eagle and Alamos Gold, respectively (Government of Ontario 2024).

Summary of Resource Development Projects

The Town of Kirkland Lake was founded in 1911 as a gold mining camp, with mining continuing to serve as one of the primary economic drivers for the community. Today, there are a number of operating mines and advanced exploration projects around the Town including (Government of Ontario 2024):

- The Macassa Mine, located within the municipality, is owned by Kirkland Lake Gold, a subsidiary of Agnico Eagle, and serves as a major employer for the community.
- The Young Davidson mine in Matachewan, owned by Alamos Gold.
- There are also several operating mines around Timmins that are about a two-hour drive from Kirkland Lake, including the Bell Creek, Black Fox, Hollinger, Hoyle Pond, Timmins West, and Williams Mines.
- The Upper Beaver is an advanced exploration project owned by Agnico Eagle which is a half hour east of Kirkland Lake.

Over 700 people in Kirkland Lake are employed in the mining, quarrying, and oil and gas extraction industry. Together with the 13 businesses engaged in the mining exploration and mining supply and service industry they make up a robust sector in Kirkland Lake (Discover Kirkland Lake n.d.b; Statistics Canada 2023).

Changes to The Population and Labour Force

The population in the Town of Kirkland Lake was 7,750 in 2021 but has declined from 8,133 since 2011 (average annual change of -0.3%) (Statistics Canada 2012, 2023). The median age was 45 years in 2021; however, the population is aging with 23% over 65 years old and only 15% are between the ages of 0 and 14 (Statistics Canada 2023). The aging and declining population has likely contributed to the decrease in the size of the labour force. With ongoing retirements, the participation and employment rates have gradually decreased since 2011, with the employment rate below 50% in 2021 (Discover Kirkland Lake n.d.a.; Statistics Canada 2023).

The mining industry in the region is anticipated to grow in the near future, but due to an existing workforce shortfall and projected retirements, companies will need to attract people from outside the region (Discover Kirkland Lake n.d.a.). In 2021, 21% of the labour force in Kirkland Lake were employed in the mining, quarrying, and oil and gas extraction industry. Other major industries include health care and social assistance (19% of the labour force), retail trade (10%), and public administration (9%) industries (Statistics Canada 2023).

Economic Contributions

The economic contributions from the mining sector in the Town of Kirkland Lake have created both opportunities and challenges. Wages in the mining industry are generally higher compared to most industries, and the industry continues to employ many local people and attract new people. However, with the Town prospering, it has contributed to rising costs of living and doing business in Kirkland Lake, which poses challenges to other businesses (Town of Kirkland Lake 2015).

Kirkland Lake has faced recent challenges associated with the contraction of the retail sector due to discretionary shopping tends to be done online or out of Town. This has led to efforts to support businesses which offer niche services such as clothing, home décor, and senior services and products (Discover Kirkland Lake n.d.c).

Impacts to the Business Community

In 2015, the Town of Kirkland Lake prepared an Economic Development Strategic Plan (Town of Kirkland Lake 2015). Mining has generally been the most prosperous industry in the Town, and to capitalize on potential opportunities, the Town identified the need to attract service and supply companies and industries that counter the environmental effects of mining. This would be accomplished by working with the nearby mines to identify and capitalize on opportunities. The plan also recognized the need to diversify the economy to mitigate any potential consequences such as a future decline in the sector or falling commodity prices. Some of the strategies included:

- Targeting industrial growth, as these sectors will spur employment and population growth, which will increase demand for retail and commercial sectors.
- Increase attractiveness of the Town through the removal of derelict buildings.
- Attract more industrial companies by improving access to markets through rail haulage and leveraging a smaller hauling outfit for northeastern Ontario/northwestern Quebec.
- Support local commercial and retail businesses such as through support with improvements to storefronts.

More recently an updated Economic Development and Tourism Strategic Plan was developed with specific goals for business attraction, infrastructure improvement, and tourism enhancement Some initiatives included (Discover Kirkland Lake n.d.c; Town of Kirkland Lake 2024):

- With a growing senior population, the Town identified the need for investment in businesses which offer services to seniors including home care, house and pet sitting, property maintenance services, mobile services, and home security.

- Invest in businesses offering niche goods or services (e.g., clothing home décor, seniors services) to addressing the declining demand for discretionary shopping which is typically satisfied through online shopping or out of town shopping.
- Development of the cultural industry, highlighting the community's rich mining history and providing unique Indigenous and culinary experiences to enhance visitor and non-local experiences.
- Attract businesses and encourage local entrepreneurship through strategic marketing and community engagement to diversify the local economy and enhance the business climate.
- Investment in public amenities and beautification of public and private spaces to appeal to investors and residents.

B3 NORTH BAY, ONTARIO

The City of North Bay is situated between two lakes in Northeastern Ontario, just 1.5 hours away from Sudbury and a 3.5-hour drive from Toronto. The City has served as a transportation hub for centuries, dating back to its origins as a settlement of the Nipissing First Nation, thanks to its strategic location within a network of rivers and waterways (North Bay n.d.a). Today, North Bay sits at the crossroads of major highways, air carriers, and railways (e.g., Canadian Pacific Railway, Canadian National Railway, Ontario Northland Railway) which have helped positioned itself as a regional economic hub, and as a national leader in the mining exploration and mining supply and services sector (Invest North Bay n.d.a).

Mining Exploration and Mining Supply and Service Industry

The City of North Bay boasts a diversified and resilient economy. Key sectors in North Bay include mining supply and services, public administration, tourism and cultural industries, technology and digital innovation, advanced manufacturing, and film and television (Invest North Bay 2024). Although there are no mines in North Bay, the City's strategic location, with a 10,000 ft. airport runway which can accommodate wide-bodied aircrafts including the Boeing 747 has fostered the growth of the mining exploration and mining supply and services sector (North Bay n.d.b). Currently, over 60 businesses are engaged in the mining exploration and supply and services sector, with expertise in (North Bay n.d.b):

- Mine exploration and development design, building and operating services;
- Fabricated metal machinery and equipment;
- Fabricated rubber plastics and chemical products specific for mining;
- Wholesale equipment and supplies; and
- Professional services including engineering and geo-technical.

Changes to The Population and Labour Force

The City of North Bay population has been stable at around 53,000 people since 2011 (Statistics Canada 2012, 2023). The business community in North Bay is engaged in a variety of sectors including mining supply and services and advanced manufacturing (Invest North Bay 2024). The labour force in North Bay was about 25,000 people and the participation rate was 58% in 2021 (Statistics Canada 2023). In 2021, 7% of the labour force were employed in the mining, quarrying, and oil and gas extraction and manufacturing industries. Additionally, 5% of the labour force were employed in professional and technical services, which includes engineering and geo-technical professions which support the mining industry (Statistics Canada 2023). The largest employment sectors for people living in North Bay include health care and social assistance (18% of the labour force), retail trade (14%), and educational services (9%).

Economic Contributions

The City has a range of targeted economic development and community improvement plans that have supported the growth of the tourism and retail industries and helped establish North Bay as an economic hub for the region. The Downtown Waterfront Master Plan outlines a strategy to enhance connections between the downtown area and nearby waterfront, recognizing their role as key drivers of the City's economic development (North Bay 2017). The revitalization and beautification of both the downtown area and waterfront will improve cultural vibrancy, attract businesses to relocate to North Bay, and improve the overall quality of life of its residents.

The City's Growth Community Improvement Plan includes a number of grants available to businesses to help stimulate private sector investments and promote renovations and intensification within designated areas across the City (North Bay 2024).

In addition to the plans published by the City to support economic growth and development, the City's economic development team provides support to companies within the City by engaging with community partners to help companies access services, sources, and funding programs to support innovation, capital requirements, recruitment, and development. To support new developments, the City created a streamlined development approach by ensuring a coordinated and timely response on development proposals to ensure projects move forward quickly and adhere to project deadlines (Invest North Bay 2024). These strategies have also supported the attraction and retention of businesses engaged in the mining exploration and mining supply and services sector.

Impacts to the Business Community

The development of the downtown area and waterfront have attracted investments, contributing to the success of the retail sector. Through the attraction and retention of mining service and supply businesses, the downtown area has prospered, allowing for businesses to expand services and new businesses to open shop. The development has also contributed to the growth of cultural industries which are a foundation of the tourism sector. These include art galleries, theatres, pubs, and markets found within the downtown area, which not only serve tourists, but also the local population and intersect with the retail sector (Invest North Bay n.d.c).

B4 CHIBOUGAMAU, QUÉBEC

The Town of Chibougamau, Québec, is the largest town in the Nord-du-Québec region and serves as a major service centre for the region. The Town serves as a strategic location for businesses engaged in the mining and forestry industries. Businesses have access to major North American markets through a network of major highways, an airport, and service by the Canadian National Railway commercial line (Chibougamau 2021).

The Town of Chibougamau is situated in a remote region of northern Québec. The mining industry in the area began to develop in the 1950s, following the construction of road and rail access. In 1949, construction of the first year-round gravel round road to Chibougamau, which later became Provincial highway 167, supported access to markets for ongoing mining and forestry operations and contributed to obtaining mining town status in 1954 (Chibougamau 2021). In 1959, the Copper Rand mine began production, and by 1962, Chibougamau and the surrounding area became the largest copper producing area in Quebec (Government of Quebec 1962). The Copper Rand mine is owned by Doré Copper Mining Corp and was in operation until 2008 (Doré Copper n.d.). Recently, Doré has announced plans to restart activities around Chibougamau (Doré Copper 2022).

Summary of Resource Development Projects

Currently there are no operating mines nearby Chibougamau (Government of Quebec 2024). In the past, people living in Chibougamau worked at the nearby Copper Rand and Troilus mines. Since the closure of the Copper Rand and Troilus mines in 2008 and 2010, respectively, people have worked at other mines within Quebec and across Canada (Raymond Chabot Grant Thornton 2012).

Feasibility studies were recently completed for restarting the Troilus mine and the Copper Rand Chibougamau mining camp, including the opening of the Corner Bay, Delvin, and Joe Mann mines which will provide feed to the Copper Rand mill (Doré Copper 2022; Troilus Gold 2024).

Changes to The Population and Labour Force

The population in Chibougamau decreased slightly from 7,563 in 2006 to 7,233 in 2021 (average annual change of -0.3%) and had a median age of 41 years old in 2021 (Statistics Canada 2012, 2023). The population has remained relatively stable since 2006, despite the closure of the Copper Rand and Troilus mines around 2010.

The labour force in Chibougamau was about 4,000 people in 2021, with participation and employment rates both being above 65%, which was higher than the provincial average (Statistics Canada 2023). With forestry and mining industries being focal parts of the economy, over 800 people work in the mining, quarrying, and oil and gas extraction or the manufacturing industries. The largest employment sectors for people living in Chibougamau include health care and social assistance (19% of the labour force), manufacturing (15%), and retail trade (12%), with employment in the mining, quarrying, and oil and gas extraction industry accounting for 6% of the labour force.

Economic Contributions

In the 1980s, a slowdown of the mining sector prompted the diversification of Chibougamau's economy, shifting towards forestry, retail, and public sectors. These industries remain key to the community today with over 40% of the labour force employed in them (Raymond Chabot Grant Thornton 2012; Statistics Canada 2023). This diversification has proved successful, as the Town's economy has continued to thrive despite the absence of an operating mine since 2010 and its legacy as a historic mining town.

Impacts to the Business Community

The diversification in the 1980's has fostered continued growth in Chibougamau's town centre. The town centre is located on Provincial Highway 167 which attracts people from across the Nord-du-Québec region due to its retail attractions including the Place le Chaînon shopping centre (Chibougamau 2021). The range of services and products provided by the retail sector continue to attract and support mining companies and their partners.

The Plan Nord was announced by the Quebec Government in 2011 and included commitments to investments to boost the development of projects, including building roads and railways and improving community infrastructure to attract investors. To meet the needs of the Plan Nord, the Town of Chibougamau submitted a request for a transfer of public lands it deemed required for meeting development needs, particularly for industrial and residential development (Raymond Chabot Grant Thornton 2012). By expanding the available land for industrial and residential development, the Town could attract new investment in industrial areas, potentially leading to population growth and economic development. This population increase would also drive growth in supporting sectors, including retail and health care and social assistance.

B5 CONCLUSION

Case studies were prepared for Kirkland Lake, Ontario; North Bay, Ontario; and Chibougamau, Québec to examine the effects of mining or all-season road development on local and transient populations and labour forces, with a focus on understanding the resulting impacts on the retail sector. Kirkland Lake and Chibougamau are historic mining towns—similar to Red Lake—that have encountered challenges in diversifying their economies. In contrast, North Bay serves as a hub for mining services and support, strategically located near several mining communities. Each of these communities have employed various strategies to diversify their economies by fostering growth in the retail sector.

Best Practices and Recommendations

The best practices and recommendations learned from the case study communities include:

- The diversification of the economy outside of the natural resources sector, which is prone to cyclical downturns is crucial for promoting a robust economy.
- Industrial development and support of businesses engaged in the mining sector will spur employment and population growth, effectively increasing demand for retail and commercial sectors.
- Improved beautification of the community through removal of derelict buildings, providing grants to support renovations and improvements to storefronts, and improvements to public and private to appeal to investors.
- Development of the cultural industry, highlighting the community's rich mining history and providing unique goods and services such as Indigenous and culinary experiences.
- Development of the core downtown area or core business area to improve attractiveness to the region and fostering the growth of retail businesses.
- Invest in businesses offering niche goods or services (e.g., clothing home décor, seniors services) to addressing the declining demand for discretionary shopping which is typically satisfied through online shopping or out of town shopping.
- Supports for businesses focused on good and services for seniors. With the inevitable increase in the senior population, this creates an opportunity to attract businesses offering goods and services to seniors including home care, house and pet sitting, property maintenance services, mobile services, and home security.

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