
# Retail Market & Gap Analysis Update

**November 2016**

Prepared for City of Fort Saskatchewan

Prepared by Cushing Terrell Architecture Inc.

CUSHING TERRELL ARCHITECTURE INC.

# RETAIL
## Market & Gap Analysis

City of Fort Saskatchewan
Alberta

CUSHING TERRELL ARCHITECTURE INC.

Member of International Council of Shopping Centers

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# Table of CONTENTS


PREFACE ................................................ i

EXECUTIVE SUMMARY ........................ ii

1.0 INTRODUCTION ............................ 1

1.1 Scope of Study & Project Background ..................... 1
1.2 Report Structure ..................... 1
1.3 Sources of Information ..................... 3

2.0 LOCATION & CONTEXT ................ 5

2.1 Introduction ..................... 5
2.2 Regional Context ..................... 5
2.3 Municipal Development Plan ..................... 5
2.4 Land Use Bylaw ..................... 6
2.5 Strategic Plan 2014 - 2017 ..................... 6
2.6 Commercial Land Use Context ..................... 7
2.7 Transportation Context ..................... 7
2.8 Development & Building Permits ..................... 9
2.9 Summary & Implications ..................... 11

3.0 RETAIL TRADE AREA PROFILE .... 13

3.1 Introduction ..................... 13
3.2 Population Projections ..................... 15
3.3 Age Profile ..................... 19
3.4 Income Profile ..................... 21
3.5 Part Time Resident Profile ..................... 23
3.6 Retail Spending Profile ..................... 23
3.7 Summary & Implications ..................... 25

4.0 RETAIL MARKET SUPPLY ............. 29

4.1 Introduction ..................... 29
4.2 Regional Retail Market Context ..................... 29
4.3 Retail Projects ..................... 31
4.4 Citywide Retail Inventory ..................... 37
4.5 Retail Inventory by Node ..................... 39
4.6 Retail Inventory by Category ..................... 41
4.7 Retail Inventory by Class ..................... 43
4.8 Retail Space Per Capita ..................... 45
4.9 Summary & Implications ..................... 47

5.0 RETAIL DEMAND & GAP ANALYSIS 49

5.1 Introduction ..................... 49
5.2 Retail Floorspace Demand by Trade Area Segment 49
5.3 Retail Gap Analysis Quantification ..................... 55
5.4 Retail Sales Inflow & Outflow ..................... 57

6.0 CONSUMER INTERCEPT SURVEY 59

6.1 Introduction ..................... 59
6.2 Respondent Demographics ..................... 59
6.3 Preferred Shopping Locations ..................... 59
6.4 Likes & Dislikes of Retail in Fort Saskatchewan ..... 63
6.5 Desired Shops & Services ..................... 67
6.6 ALL Respondents Spending vs Importance .......... 73
6.7 Respondent Cross-Tabulation of Spending vs Importance ..................... 75
6.8 Summary & Implications ..................... 79

7.0 CONCLUSION ................................ 81

7.1 Introduction ..................... 81

APPENDIX A ........................................ 88

Detailed Retail Inventory .....................

APPENDIX B ........................................ 94

Consumer Survey Open-Ended Retail Responses .........

APPENDIX C ........................................ 99

Consumer Survey Raw Data .....................

# TABLE OF CONTENTS (TABLES & FIGURES)

## TABLES


3.1 Trade Area Population Projections Summary ....... 16
3.2 Trade Area Population Age Breakdown.................. 18
3.3 Trade Area Household Income Breakdown........... 20
3.4 Trade Area Retail Spending ........................................ 22
4.1 City of Fort Saskatchewan Retail Inventory........... 35
4.2 Retail Inventory by Category & Node ...................... 37
4.3 Retail Inventory by Node & Class.............................. 41
5.1 City of Fort Saskatchewan Retail Floorspace Demand 50
5.2 Temporary Resident Retail Floorspace Demand.. 50
5.3 Total PTA (including City) Retail Floorspace Demand 51
5.4 STA West Retail Floorspace Demand ...................... 51
5.5 STA East Retail Floorspace Demand......................... 52
5.6 TOTAL Trade Area Retail Floorspace Demand....... 52
5.7 Retail Inflow & Outflow Estimates ........................... 56


## FIGURES


2.1 City of Fort Saskatchewan Regional Context Map 4
2.2 Commercial Land Use Districts ................................ 7
2.3 City of Fort Saskatchewan Traffic Counts .............. 8
2.4 City of Fort Saskatchewan New Construction Starts 10
3.1 City of Fort Saskatchewan Retail Trade Area ........ 12
3.2 Retail Trade Area Population Growth Rates.......... 16
3.3 Trade Area Population Age Breakdown.................. 18
3.4 Trade Area Household Income Breakdown........... 20
3.5 Trade Area Retail Spending By Trade Area ............ 22
3.6 Trade Area Retail Spending Summary 2014.......... 24
3.7 Trade Area Retail Spending by General Category 24

4.1 City of Fort Saskatchewan Retail Market Context 30
4.2 City of Fort Saskatchewan Retail Inventory & Projects 32
4.3 Retail Nodes..................................................................... 36
4.4 City Retail Imagery........................................................ 38
4.5 City of Fort Saskatchewan Retail Inventory Floorspace By Category ...................................................................... 40
4.6 City of Fort Saskatchewan Retail Inventory by Category and Number of Stores............................... 42
4.7 City of Fort Saskatchewan Retail Inventory by Class 45
5.1 City of Fort Saskatchewan Retail Spending Supply and Demand ............................................................................ 54
6.1 Consumer Intercept Survey Respondent Residence of Origin ............................................................................... 58
6.2 Consumer Intercept Survey Heat Map By Postal Code Forward Sortation Area ....................... 60
6.3 Consumer Survey Age Profile ALL Respondents.. 61
6.4 Consumer Survey Income Profile ALL Respondents 61
6.5 What is your Primary Convenience Shopping Centre? 62
6.6 What is your primary reason for choosing a Convenience Shopping Centre? ............................... 62
6.7 What is your Primary Comparison Shopping Centre? 64
6.8 What is your primary reason for choosing a Comparison Shopping Centre?................................ 64
6.9 What do you like most about shopping in Fort Saskatchewan?...................................................... 65
6.10 What do you dislike most about shopping in Fort Saskatchewan? ..................................................... 65
6.11 What new stores/services would increase your spending in Fort Saskatchewan?.............................. 66
6.12 What Full-Service Restaurants do you want to see in Fort Saskatchewan? ......................................... 68
6.13 What Limited Service Restaurant do you want to see in Fort Saskatchewan? ......................................... 69
6.14 What retail stores do you want to see in Fort Saskatchewan?...................................................... 70
6.15 What types of stores do you want to see in Fort Saskatchewan?...................................................... 71
6.16 Spending vs. Importance Rating for ALL Respondents 72
6.17 Spending vs Importance Rating Temporary Residents 72
6.18 % Spending in Fort Saskatchewan by Age Cohort 74
6.19 Importance rating to increase spending in Fort Saskatchewan by Age Cohort.................................... 74
6.20 % Spending in Fort Saskatchewan by Income...... 76
6.21 Importance rating to increase spending in Fort Saskatchewan by Income............................................ 76

# PREFACE

Cushing Terrell Architecture Inc. ("Cushing Terrell") was initially commissioned by the City of Fort Saskatchewan in August 2014 to conduct a Retail Market and Gap Analysis for the City. This initial study was carried out over the period August to January 2015.

Subsequent to this study, an update to the study was undertaken over the months of August and September 2016, to reflect evolving and changing market dynamics.

The objective of this study is to document in detail the City of Fort Saskatchewan's current retail inventory and estimate the Trade Area retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow or also known as surplus/leakage.

Retail spending (i.e. demand) and the City's retail inventory and its corresponding productivity (i.e. supply) was augmented and supported by a detailed Consumer Intercept Survey conducted by Keyfax Market Research to further identify gaps in Fort Saskatchewan's current provision of shops and services.

This document is intended to assist the City of Fort Saskatchewan in promoting the community, working with developers and investors, as well as attracting new or expanding retailers/ formats, retaining existing retailers and providing an overall identity/positioning strategy for future developments which could feature retail throughout the City's various retail nodes and districts.

The 2016 update is to provide current demographic estimates and projections as well as update the City's retail inventory and composition thereof.

Reference material for this report was obtained from, but not limited to: The City of Fort Saskatchewan, Commercial Real Estate Brokerage Firms (Colliers, Cushman Wakefield, Avison Young), Conference Board of Canada, Fort Saskatchewan Chamber of Commerce, Local Commercial Developers (Qualico, Haro Developments), International Council of Shopping Centers, Pitney Bowes, and Cushing Terrell Architecture Inc.

Cushing Terrell does not warrant that any estimates contained within the study will be achieved over the identified time horizons, but that they have been prepared conscientiously and objectively on the basis of information obtained during the course of this study.

Also, any tenant references made in the report are for illustrative purposes only and should not be taken as guarantees that they will locate in the City of Fort Saskatchewan, but rather that they could represent compatible "target" retailers.

This analysis was conducted by Cushing Terrell as an objective and independent party; and is not an agent of the City of Fort Saskatchewan.

As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed permission of Cushing Terrell Architecture Inc. or the City of Fort Saskatchewan

*Cushing Terrell Architecture Inc. - November 2016*

# ii EXECUTIVE SUMMARY

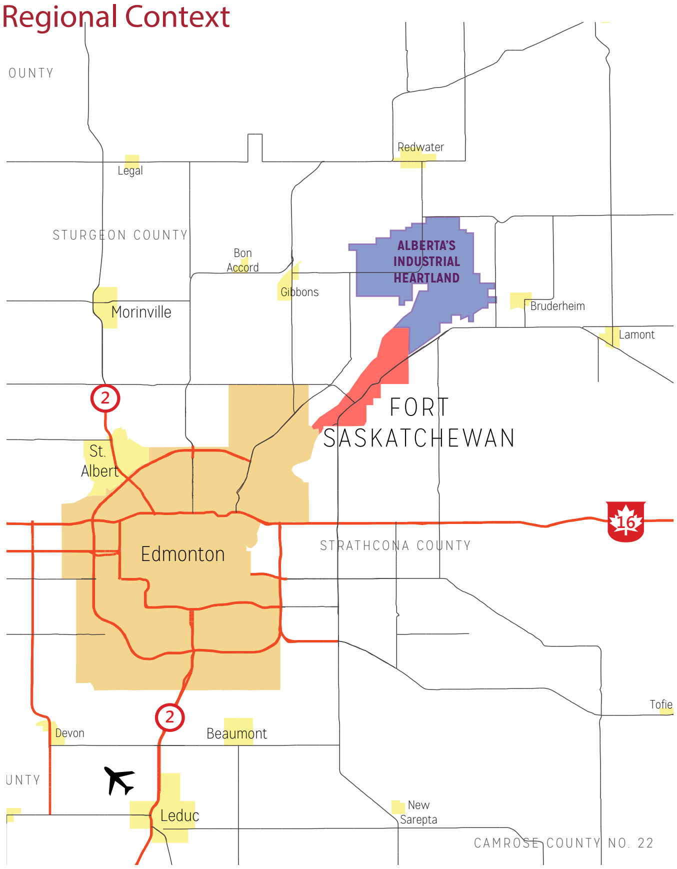
## INTRODUCTION

The objective of this study is to document in detail the City of Fort Saskatchewan's current retail inventory and estimate the Trade Area retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow or also known as surplus/ leakage.

## LOCATION CONTEXT SUMMARY

The City of Fort Saskatchewan is a rapidly growing market with strong patterns of residential development supported by a retail infrastructure that has responded and continues to respond in step with new demand as the market has grown. It is also the closest urban centre to Alberta's Industrial Heartland.

Regional Context




The City has all the necessary criteria to support retail opportunities, though these opportunities may not be represented necessarily by large format retailers for whom Fort Saskatchewan's regional context relative to new emerging major nodes such as Emerald Hills and Manning Park may not be as strong.

Traffic counts, which are in excess of 20,000 to 23,000 vehicles in and around new major nodes does bode well for attracting further branded tenants for whom other areas of the community may not be as busy.

## RETAIL TRADE AREA SUMMARY

Both Emerald Hills and Manning Town Centre continue to be in the midst of developing significantly sized retail developments with strong clusters of destination and Comparison or Department Store Type Merchandise (DSTM). Each of these projects has Fort Saskatchewan as part of their Primary Trade Area and thus it would be difficult for the City of Fort Saskatchewan to compete directly against these emerging strong retail nodes. Therefore, the Retail Trade Area for Fort Saskatchewan must be realistic and not overstate the area against which it will compete.

Accordingly, the Retail Trade Area for the City of Fort Saskatchewan is a reflection of the competitive influences as well as a realization that residents of Fort Saskatchewan and the communities north, west and east will still like the convenience and accessibility that Fort Saskatchewan provides for a critical mass of more neccessity-based merchandise, while not discounting the need for more essential comparison items.

# ii EXECUTIVE SUMMARY

The Trade Area Demographic Profile illustrates a very strong local trade area that will grow from an estimated 38,700 in 2016 to approximately 46,000 over the next decade. It is plausible that even this growth could be exceeded if and/or as the City's growth strategy is reviewed.

Fort Saskatchewan's strengths lie in its demographics, which are substantiated by a significant household income ($120,000 2016 estimate), which is above the regional and provincial averages ($107,000 & $119,000 respectively).

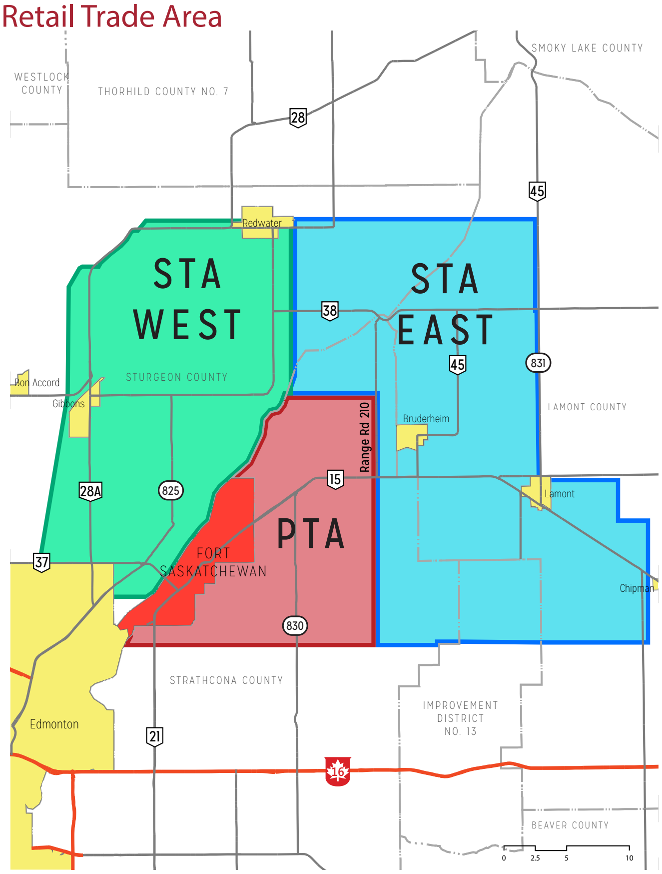
Secondly, the Trade Area has a strong, dynamic young family profile who are both mobile in their shopping patterns, yet are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

Overall, Fort Saskatchewan represents a $550 million retail market (YE 2016 estimate) in which categories such as Grocery, Automotive/RV and Restaurants, Clothing/Apparel & Footwear represent significant spending segments.

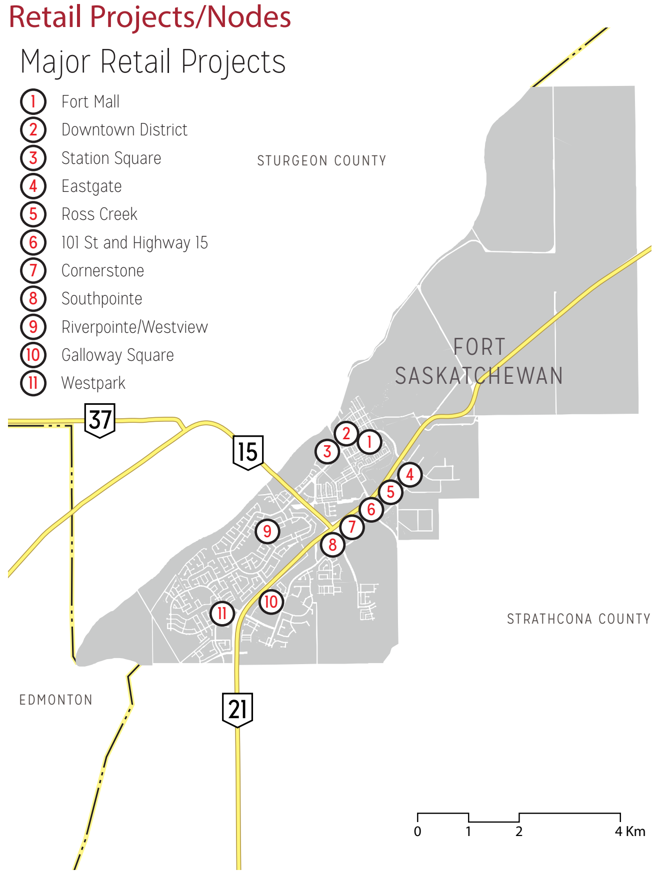
## RETAIL SUPPLY SUMMARY

The inventory for the City of Fort Saskatchewan illustrates a community-oriented retail offering that provides essential shops and services for residents of Fort Saskatchewan as well as populations within an approximate 15 - 20 minute drive, primarily north, northwest and east of the City.

### Retail Trade Area




### Retail Projects/Nodes






CITY OF FORT SASKATCHEWAN

# EXECUTIVE SUMMARY

## Retail Floorspace Demand versus Supply for Total Retail Trade Area

| Retail Spending by Merchandise Category | Total Floorspace Demand (sf) | Current City Retail Inventory (sf) | Total Residual Demand (sf) |
|---|---|---|---|
| | 2016 (Year End Est.) | | |
| Grocery & Specialty Foods | 176,364 | 181,075 | -4,711 |
| Pharmacy | 18,347 | 28,529 | -10,183 |
| Alcohol & Tobacco | 48,277 | 50,426 | -2,150 |
| Personal Services | 65,049 | 138,712 | -73,663 |
| Clothing & Apparel | 54,944 | 84,211 | -29,267 |
| Footwear | 15,868 | 4,741 | 11,128 |
| Jewelry & Accessories | 3,896 | 6,019 | -2,122 |
| Health & Beauty | 15,937 | 34,961 | -19,024 |
| Home Furnishings & Accessories | 33,335 | 19,744 | 13,591 |
| Home Electronics & Appliances | 23,758 | 38,301 | -14,543 |
| Home Improvement & Gardening | 33,648 | 120,919 | -87,271 |
| Books & Multimedia | 5,976 | 2,403 | 3,574 |
| Sporting Goods & Recreation | 9,435 | 22,781 | -13,346 |
| Toys & Hobbies | 10,037 | 13,936 | -3,899 |
| Miscellaneous Specialty | 31,726 | 83,700 | -51,974 |
| Full-Service F&B | 28,629 | 76,645 | -48,016 |
| Limited Service F&B | 16,039 | 59,768 | -43,729 |
| Entertainment & Leisure | 39,141 | 63,119 | -23,978 |
| Auto Parts & Accessories | 16,981 | 65,798 | -48,817 |
| Auto/RV/Motorsports Dealership | 86,788 | 57,400 | 29,388 |
| **TOTAL RETAIL CATEGORIES ONLY** | **734,175** | **1,153,187** | **-419,012** |

## Retail Spending Inflow / Outflow Estimates

| Merchandise Category | Est. Current Annual Sales by Category (SUPPLY) | Est. Fort Saskatchewan Expenditure Potential 2016 (DEMAND) | Fort Saskatchewan Outflow / Inflow Estimates | Fort Saskatchewan Outflow / Inflow Factor |
|---|---|---|---|---|
| Grocery & Specialty Foods | $103,721,599 | $83,075,400.19 | $20,646,199 | 11.1 |
| Alcohol & Tobacco | $13,295,001 | $8,598,610.50 | $4,696,390 | 21.5 |
| Pharmacy | $33,026,130 | $19,730,876.78 | $13,295,253 | 25.2 |
| Personal Services | $36,557,464 | $17,176,991.82 | $19,380,472 | 36.1 |
| Clothing & Apparel | $19,984,681 | $28,053,121.71 | -$8,068,440 | -16.8 |
| Footwear | $1,261,648 | $8,342,051.39 | -$7,080,403 | -73.7 |
| Jewelry & Accessories | $4,206,539 | $4,886,199.12 | -$679,660 | -7.5 |
| Health & Beauty | $12,372,834 | $7,956,941.75 | $4,415,892 | 21.7 |
| Home Electronics & Appliances | $11,670,047 | $21,911,213.72 | -$10,241,167 | -30.5 |
| Home Furnishings & Accessories | $8,440,049 | $32,919,514.36 | -$24,479,466 | -59.2 |
| Home Improvement & Gardening | $39,643,018 | $8,952,854.28 | $30,690,163 | 63.2 |
| Books & Multi-Media | $615,563 | $5,807,047.96 | -$5,191,485 | -80.8 |
| Sporting Goods & Outdoor Recreation | $5,686,751 | $4,560,971.33 | $1,125,780 | 11.0 |
| Toys & Hobbies | $3,026,751 | $3,902,693.63 | -$875,943 | -12.6 |
| Specialty Retail | $16,317,761 | $11,565,735.92 | $4,752,025 | 17.0 |
| Full Service F&B | $27,515,773 | $12,295,447.98 | $15,220,325 | 38.2 |
| Limited Service F&B | $29,769,081 | $11,349,644.29 | $18,419,437 | 44.8 |
| Entertainment & Leisure | $10,819,683 | $15,337,606.44 | -$4,517,924 | -17.3 |
| Auto Parts & Accessories | $22,155,109 | $6,712,212.77 | $15,442,897 | 53.5 |
| Auto/RV/Motorsports Dealership | $13,700,677 | $59,423,714.18 | -$45,723,037 | -62.5 |
| VACANT | | | | |
| **TOTAL** | **$413,786,157** | **$372,558,850** | **$41,227,307** | **5.2** |

# ii EXECUTIVE SUMMARY

Overall, the City's inventory has grown substantially over the past few years to a point now whereby the City should exercise caution so as to not be over-retailed in categories that could negatively impact areas such as Downtown.

The City has an estimated retail inventory of almost 1.19 million sq. ft. which inclues vacancy of less than 4% which suggests a healthy retail environment.

## RETAIL DEMAND SUMMARY

Total demand for floorspace in the City of Fort Saskatchewan attributable to residents of the Primary and Secondary Trade Areas is estimated at approximately 735000 sq. ft.

When compared against the current City's occupied retail inventory or supply at 1.15 million sq. ft., the difference between demand and supply equates to almost 420,000 sq. ft. of retail space. In other words, the city has 420,000 sq. ft. more retail space than current demand warrants.

If one factors into the equation forecasted population growth in the total trade area of approximately 7,300 over the next decade to 2026 (the majority of which will be in the City of Fort Saskatchewan), then estimated future floorspace demand could grow by approximately 185,000 to 220,000 sf (if applying per capita ratios of 25 to 30 sf per capita).

When factoring future demand against the current negative residual demand, the forecasts suggests the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that exhibit strong retail sales inflow potential. Examples include Grocery, Pharmacy and Food & Beverage.

This also applies to very specifically targeted comparison merchandise tenants who may be prepared to have a store in Fort Saskatchewan as well as Strathcona County and Northeast Edmonton.

Fort Saskatchewan's spending reveals a pattern in which more day-to-day types of categories generate inflow and surplus sales and could thus be targeted by retailers.

Conversely, the categories exhibiting outflow are all the types of categories that people are prepared to drive 30 - 45 minutes to access, which brings into play a wide array of projects that even includes South Edmonton Common and West Edmonton Mall. The northeast component of the Anthony Henday will only increase acessibility to areas like West Edmonton Mall.

Given Fort Saskatchewan's retail trade area demographics and spending attributes, specific target categories include Grocery, Pharmacy, Personal Services, Toys & Hobbies, Full & Limited Service F&B, Health & Beauty.

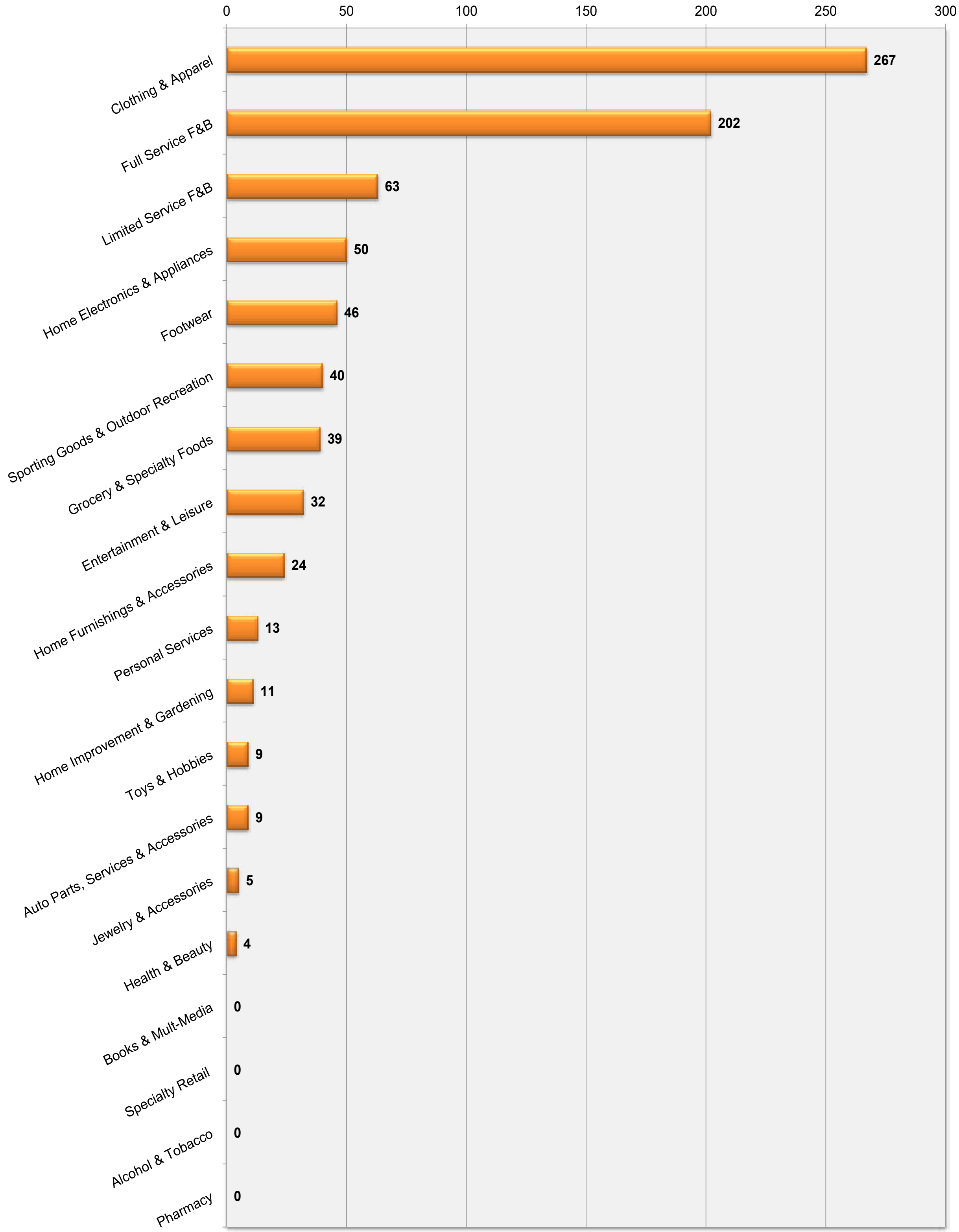
A market like Fort Saskatchewan in which inflow exists for specific categories and where it would be difficult to provide a comparison offering that could be competitive in the market is more poignant in that retailers can have the confidence in knowing that demand is already present in a market.

Fort Saskatchewan has an estimated net sales inflow of only $41 million and does a very good job of retaining and attracting Convenience spending from its Trade Area with a net inflow of $58 million.

Similarly, Fort Saskatchewan garners strong inflow from Limited Service Restaurants ($18.4 million). However, Fort Saskatchewan's penetration of the Full-Service Restaurant category could be stronger.

# ii EXECUTIVE SUMMARY

Types of Stores Desired in Fort Saskatchewan



ii EXECUTIVE SUMMARY

Fort Saskatchewan's major leakage occurs in Automotive/RV Dealers ($45.7 million), Clothing & Footwear ($15.1million) and Home Furnishings ($24.5 million). These are categories Fort Saskatchewan will be hard pressed to compete with and thus may not be priorities for targeting.

## CONSUMER SURVEY SUMMARY

The Consumer Intercept Survey yielded findings that reinforce the more localized trade area for the City of Fort Saskatchewan.

The majority of respondents indicated a desire to have more Clothing & Footwear, Full Service Restaurants and Grocery. These particular categories were not only identified as specific categories, but the spending patterns and importance ratings of the respondents validated these sentiments.

Respondents identified a number of recognized restaurant and retailer brands. While Fort Saskatchewan is well positioned to attract many of the full and limited service restuarants identified, caution should be exercised as it relates to the list of comparison retailers. Many of the desired comparison retailers are mid to larger sized formats who are likely to be drawn to new developments at Emerald Hills and/or Manning Town Centre.

As such, Fort Saskatchewan should use the consumer survey trends that suggest targeting smaller more value-oriented retailers that could infill existing retail nodes, thus not necessitating another new large retail node or nodes.

The types of tenants sought by respondents combined with their spending patterns further suggest that the most compatible locations that can fulfill retailer site location requirements will likely fall in the Central and South nodes and to a lesser degree the Downtown.

The redevelopment of the Fort Mall should however provide a significant and viable option for tenants looking for newer space at potentially more affordable rates.

The Downtown area will continue to face external pressures resulting from continued growth on the fringe of the City. The Downtown is still recognized as a key node that can accommodate future tenant opportunities, particularly in the specialty retail, food & beverage categories and personal services categories.

## CONCLUSION

Since 2014, when the original study was undertaken, Fort Saskatchewan has been reslient in maintaingn moderate retail growth. The population of the Total Trade Area, driven by growth in the city of Fort Saskatchewan has continued.

The temporary workforce or "shadow population" has declined from previous estimates of 2,500 plus to approximately 1,250 or about half or less.

As with other markets affected by a drop in oil prices, consumer confidence and retail-specific spendin has slowed, but this is expected to slowly rebound over the next few years.

A lower spending, within the Trade Area has also resulted in an esstimated and corresponding decline in retail sales productivity for retailers in Fort Saskatchewan.

Their has however been an introduction of new tenants in the market since 2014, with notable brands such as Canadian Brewhouse, Shoppers Drug Mart, Wendy's, Montana's and Kal Tire, as well as a second Shoppers Drug Mart.

The majority of new retail businesses in fort Saskatchewan over the past two (2) years have however been local, which is a very positive sign of strength and resilience.

As the City grows, even in the face of weaker consumer confidence and spending, it is ever moer important that the City recognize and prioritize retention and attraction for Downtown businesses.

Although residual demand continues to be in the negative (~ 420,000 sf), the recent economic challenges have shown a greater desire for convenience spending to be more localized. This has been manifest in less outflow overall than in 2014, particularly for convenience categories where Trade Area residents are staying closer to home.

Alternatively, bigger ticket items such as Auto and Recreational Vehicles as well as Comparison categories (or Department Store Type Merchandise DSTM) still exhibit outflow dollars from the community and this will likely be the case over the next 5-10 years.

Convenience and Food & Beverage categories will continue to be strong as will Specialty Retail, Auto Parts and Personal Services, or those categories for whom distance and time are a factor.

Consequently, the City of Fort Saskatchewan should look to the following considerations as it relates to guiding the retail prospects of the City over the next decade:

- Ensure that retail growth does not come at the expense of the Downtown.
- Promote the infill of existing new and developing retail nodes as a way of cultivating critical mass and critical mix.
- Prioritize key target categories and tenants that can benefit from the sales inflow as well as curbing some outflow of specific categories.
- Avoid trying to compete with the major retail nodes at Emerald Hills and Manning Town Centre, but rather solidify the City's role as a strong service centre, until such time as the City's population itself could warrant development at that magnitude.
- Market the City's offering of shops and services to the identified north, northwest and eastern parts of the trade area to attract and retain more of their spending.

# 1 INTRODUCTION

## 1.1 SCOPE OF STUDY & PROJECT BACKGROUND

Cushing Terrell Architecture Inc. ("Cushing Terrell") was initially commissioned by the City of Fort Saskatchewan in August 2014 to conduct a Retail Market and Gap Analysis for the City. This initial study was carried out over the period August to January 2015.

Subsequent to this study, an update to the study was undertaken over the months of August and September 2016, to reflect evolving and changing market dynamics.

The objective of this study is to document in detail the City of Fort Saskatchewan's current retail inventory and estimate the realistic Trade Area and its inherent retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow or surplus/leakage.

## 1.2 REPORT STRUCTURE

Cushing Terrell conducted inital on-the-ground research in September 2014 supplemented by research gathered during the overall period August 2014 to December 2014 and updated with information provided by the City in August 2016 to gain a firm understanding of existing and future retail projects and prospects in Fort Saskatchewan as well as new, vacant and closed retailers since 2014. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity and associate gaps in the market provision of shops and services and to whom such gaps could be targeted.

In addition to this, the 2016 information has been used to update the original tables, charts, and statistics to convey the current direction of the retail market in Fort Saskatchewan. General market research was also conducted to further understand the retail, social, and economic changes taking place within the community.

To respond to the work program process, the document is presented in the following sections:

**Section 1 - Introduction:**
Introduces the study process and structure.

**Section 2 - Location Analysis & Site Context:**
Lays out the important regional and local context of the City of Fort Saskatchewan as a location that targeted retailers could express interest.

**Section 3 - Retail Trade Area Profile:**
Identifies and defines the Primary and Secondary Retail Trade Areas and documents the population and expenditure profiles generated from within these respective trade areas, against which estimates of floorspace demand can be attributed. Given Fort Saskatchewan's status as an Oil & Gas hub, the smaller yet nontheless important temporary/part-time resident base was also profiled.

**Section 4 - Retail Market Supply:**
Assesses the location and characteristics of Fort Saskatchewan's current nodes of retail activity ("supply"), including developing or future planned retail sites. Fieldwork assessments included identifying and quantifying the entire City's retail inventory by node, retailer and merchandise category.



CITY OF FORT SASKATCHEWAN

Photo credit: Cushing Terrell Architecture Inc. 2014

**Section 5 – Retail Demand & Gap Analysis:**
Trade Area spending and sales productivities were estimated resulting in "demand" associated with each retail category. The demand estimates were then applied against supply to estimate the magnitude of inflow and outflow of retail on a category-by-category basis.

**Section 6 – Consumer Intercept Survey:**
A Consumer Intercept Survey was conducted by Keyfax Market Research in which the full-time and part-time residents of Fort Saskatchewan and surrounding communities were interviewed. An in-person questionnaire tool was used to ascertain shopping patterns and consumer preferences for retail tenants and formats in the City of Fort Saskatchewan, along with their current spending habits and importance ratings for the types of new retail categories that the City could pursue to enhance the offering and retain expenditure within the community.

**Section 7 – Conclusion:**
Conclusions highlight and summarize the most salient Market Analysis findings as well as missing merchandise categories and identify a roster of potential market-compatible retailers whose typical site selection criteria match the trade area demographics and locational attributes of Fort Saskatchewan.

## 1.3 SOURCES OF INFORMATION

During the course of this study, a number of information resources were used to quantify retail market supply and demand conditions.

In addition to primary and secondary research, Consumer Intercept Interviews were also conducted to further supplement the retail supply and leakage quantification analysis. The following sources of information were used in this Retail Market & Gap Analysis:

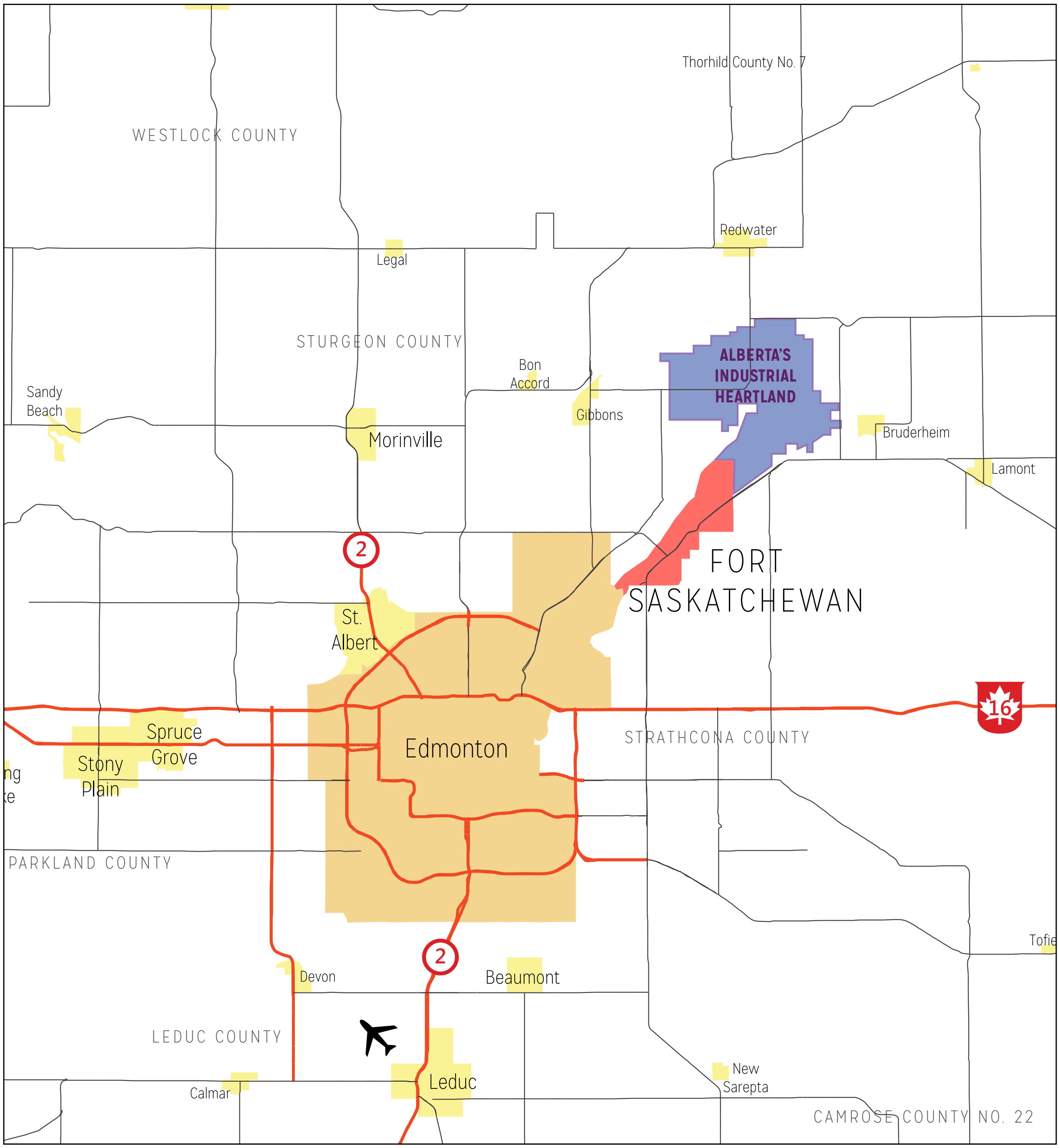
- City of Fort Saskatchewan Growth Study, 2015
- City of Fort Saskatchewan Strategic Plan 2014-2017
- City of Fort Saskatchewan Municipal Development Plan, 2010-2030
- City of Fort Saskatchewan Downtown Area Redevelopment Plan, 2009
- City of Fort Saskatchewan Municipal Census, 2014
- City of Fort Saskatchewan Land Use Bylaw
- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume History 2003-2013
- Environics Analytics, Western Canada 2013
- Keyfax Market Research Consumer Intercept Survey, September 2014
- Cushing Terrell Architecture Inc. Detailed Retail Inventory Fieldwork, September 2014

Cushing Terrell would like to thank the following firms and organizations from whom additional information was obtained to provide supplemental retail development, project profiles market, and tenant information:

- Avison Young
- Qualico Developments
- Haro Developments Ltd. (and Square Root Architecture Ltd.)
- Springwood/CREIT
- International Council of Shopping Centers -Alberta and Metro Edmonton Non-Anchored Mall Tenant Retail Sales Productivities, 2014
- Conference Board of Canada Metropolitan Outlook, Summer 2014
- Statistics Canada, 2014
- Fort Saskatchewan Chamber of Commerce
- Colliers, Fort Saskatchewan Demographics & Retail Potential, 2011
- Colliers International
- Cushman Wakefield

Figure 2.1

## CITY OF FORT SASKATCHEWAN CONTEXT MAP



# 2 LOCATION & CONTEXT

## 2.1 INTRODUCTION

Strong locational factors are an essential foundation to retail success, and an understanding of these factors can help create the necessary conditions for attracting and retaining retail businesses in a community. This section identifies Fort Saskatchewan's regional and local characteristics as they relate to the attraction and retention of retail businesses and merchandise categories.

The analysis begins with a macro study of the Fort Saskatchewan regional context as it relates to surrounding counties and cities/towns therein, as well as the City of Edmonton.

## 2.2 REGIONAL CONTEXT

The City of Fort Saskatchewan is approximately 30 km northeast of Edmonton. Being at the gateway to Alberta's Industrial Heartland (AIH), the City is well positioned to benefit from economic growth related to industrial development, particularly that related to the Oil & Gas Industry. The City also benefits from its proximity to downtown Edmonton, a 30-minute drive away. This proximity is a benefit for a commuting workforce, but also creates challenges for providing a depth of retail opportunities.

Numerous highways connect Fort Saskatchewan to the population and industrial centres necessary to support potential multi and chain store retail operations for whom timely access to markets forms an essential part of their store network strategy.

The City conservatively services a trading area of almost 39,000 people spanning the City itself and neighbouring counties such as Sturgeon, Bruderheim, Gibbons, Thorhild and Lamont.

Though Fort Saskatchewan is not considered a regional-serving destination, it nonetheless serves as a critical and convenient catchment for shops and services for towns such as Lamont, Bruderheim, Redwater, Gibbons and Bon Accord (refer to **Figure 2.1**).

## 2.3 MUNICIPAL DEVELOPMENT PLAN

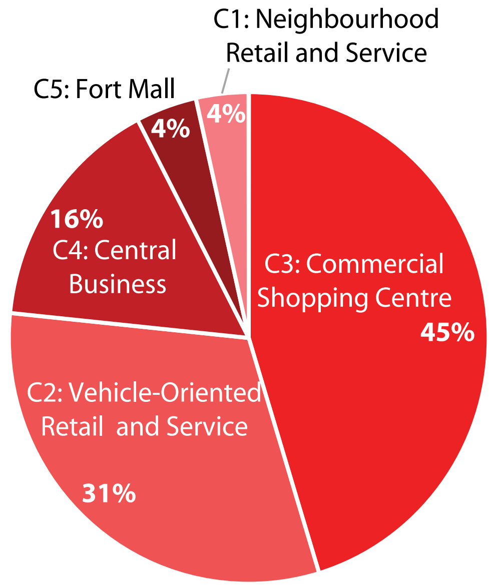
The City's Municipal Development Plan (MDP) addresses long-term commercial growth in the Future Land Use Plan. The Future Land Use Plan addresses growth only within the municipal boundary, and in general the plan directs/encourages growth to the east, southeast and south. Major growth and development on lands to the north and west is limited by existing heavy industrial uses and the North Saskatchewan River respectively.

The Future Land Use map designates new growth areas with the "Developing Communities" (DCA) designation. Policies for the DCA land use that are relative to new retail development include a desire for a mix of residential and commercial uses as well as the need for neighbourhood-serving commercial. This suggests smaller format retail or offices is the City's desired commercial use for DCA areas. This type of land use is generally consistent with what demand would dictate.

The City generally aims to direct new large-format retailers to areas that have attracted existing large retailers, such as Cornerstone and Southpointe. Such areas are designated as "Commercial" (C) land use.

With respect to retail development in this C-designated area, the MDP states, *"The City will concentrate future highway commercial development in these areas…"*, preserving land in other areas for neighbourhood-serving commercial uses.

*Commercial Land Use District Composition*



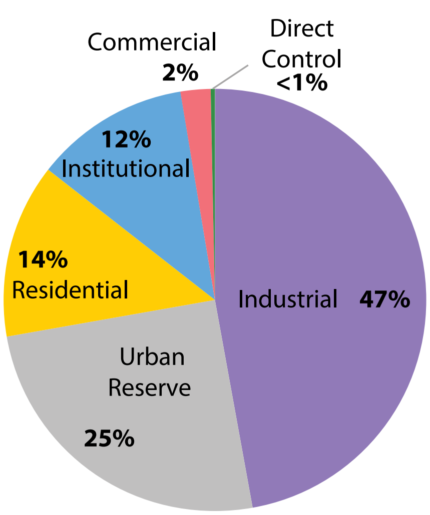

It is the intent of the MDP to intensify the retail uses in this area if possible. The Future Land Use Plan does not suggest that existing Commercial areas will expand into the surrounding "General Urban Area" land use, which is intended to be a more neighbourhood-oriented district.

As is stated in the MDP, and further validated by market analysis and inventory fieldwork, the Downtown area and former shopping malls, including Fort Mall, have become marginalized by the emergence of power centres over the past decade, particularly in the west side of the City.

Certainly the Downtown may not be the first destination of choice for new retailers, particularly those with a brand affiliation, **but the role of the Downtown is absolutely critical to providing opportunities for local retailers and entrepreneurs, as well as providing an identity for the city.**

The Future Land Use Plan designates the "Downtown" Land Use District as the focal point of commerce and community interaction in the city. Policies for Downtown largely reflect those in the Downtown Area Redevelopment Plan.

*Land Use District Composition*




## 2.4 LAND USE BYLAW

The City's Land Use Bylaw addresses commercial lands in "Part 6 - Commercial Land Use Districts".

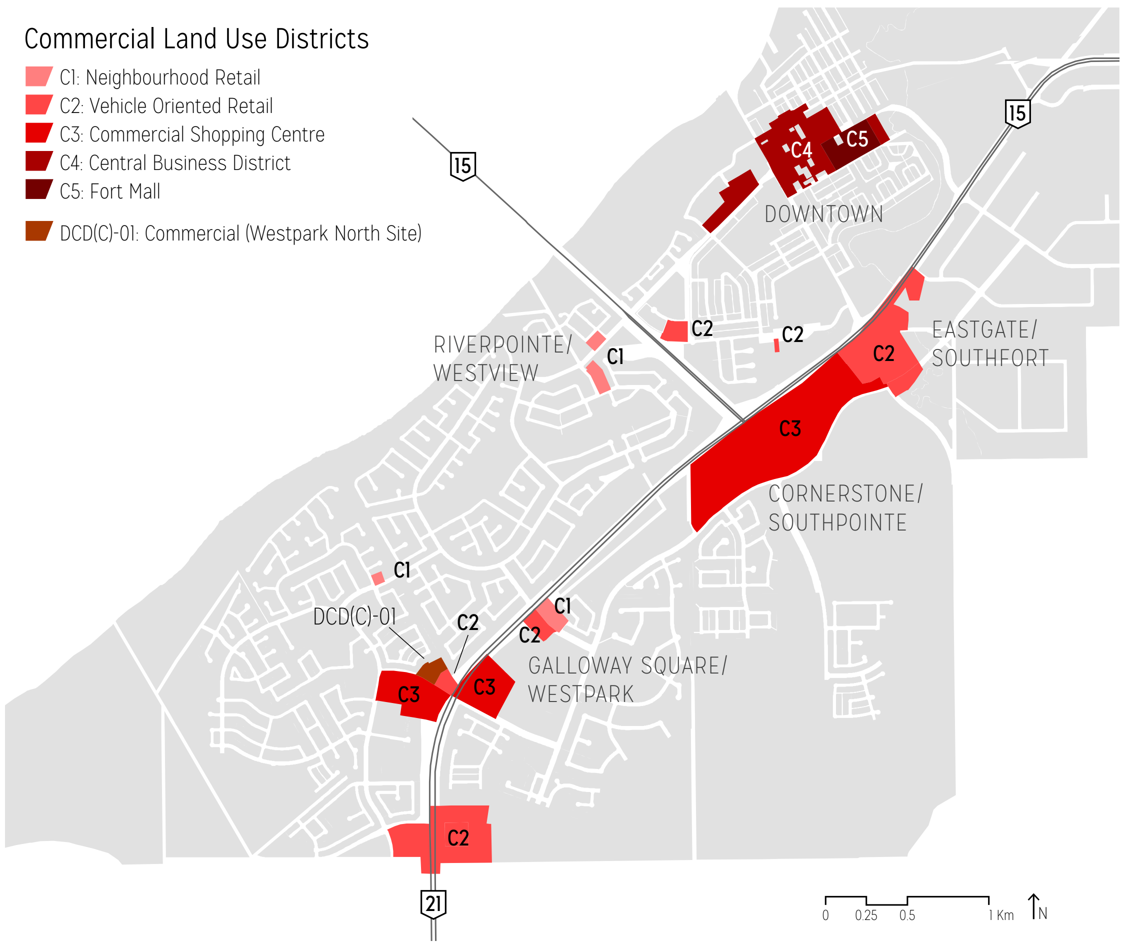
Although Commercially-zoned land comprises about two percent (2%) of all land use in Fort Saskatchewan, the Urban Reserve Land Use District represents areas that have potential for new growth (25%). As such, Urban Reserve areas adjacent to existing Vehicle Oriented Retail and Commercial Shopping Centre districts (Eastgate, Southpointe and the south entrance to the City) may have potential to absorb new commercial development, if and as demand warrants, though it must be important to ensure that any such development maintains compatibility with the City's overall vision for retail retention, expansion and attraction.

## 2.5 STRATEGIC PLAN 2014-2017

The City's Strategic Plan is a comprehensive plan to guide Fort Saskatchewan during the four years of 2014-2017. Goals include ensuring consistent and long term growth, including economic development that is diverse and beneficial for the community.

# 2

Figure 2.2
## COMMERCIAL LAND USE DISTRICTS




2.6
## COMMERCIAL LAND USE CONTEXT

**Figure 2.2** shows the commercial lands in the City. The areas shown in red depict land currently zoned for Commercial Land Uses. The map illustrates concentrations of Commercial lands in which existing as well as major future commercial development are or may be situated.

2.7
## TRANSPORTATION CONTEXT

One of the most significant aspects to successful commercial development relates to patterns of transportation. Most significant to retail businesses, the ability to be accessible as well as visible to high volumes of traffic is among their most major considerations.

For a localized market such as Fort Saskatchewan, a retail location relative to strong and accessible transportation patterns remains an important component, as illustrated by recent retail developments at the convervgence of Hwy 21 & Hwy 15, where traffic counts are highest in the City.

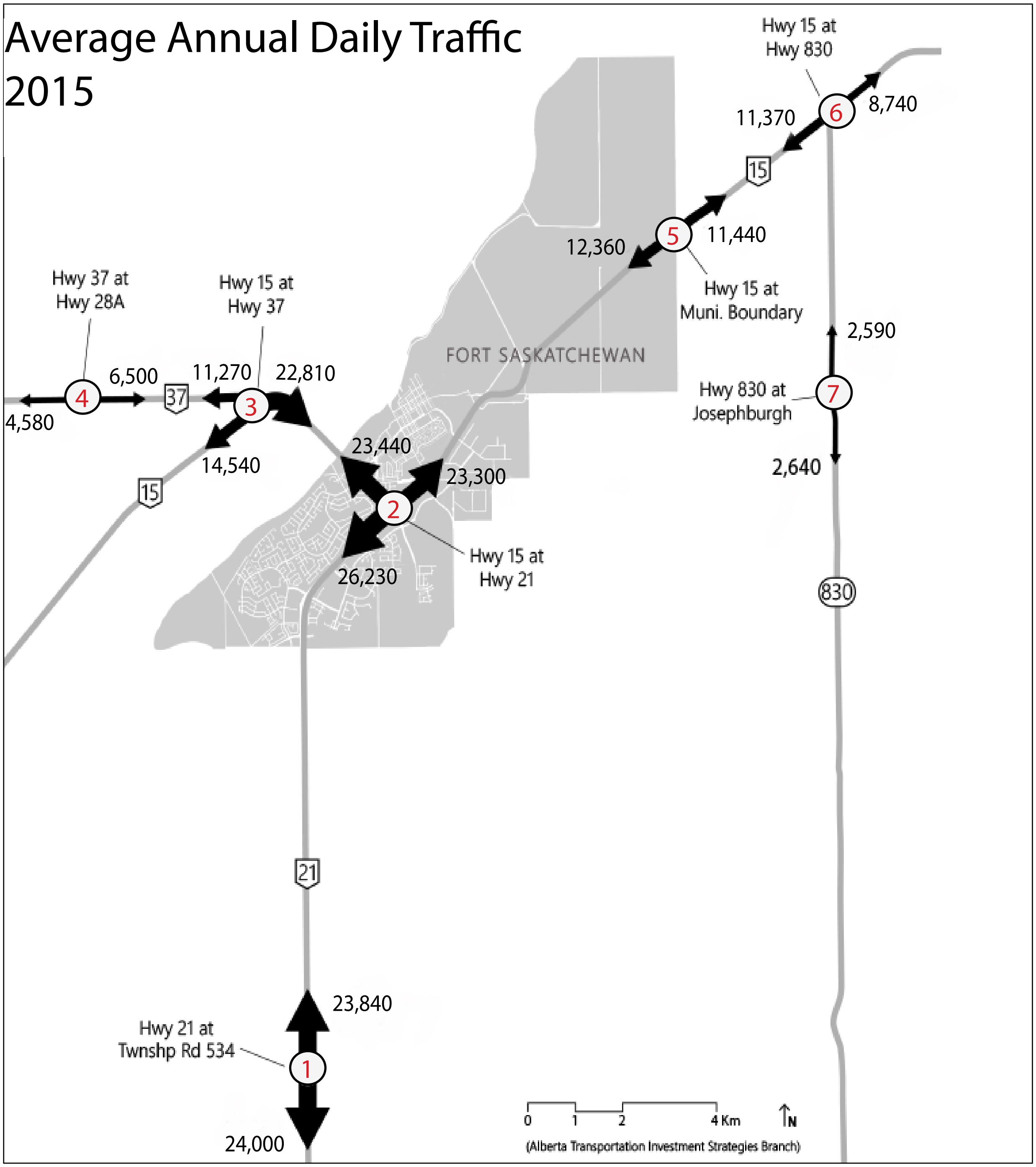
Accordingly, **Figure 2.3** reveals the major high volume traffic corridors, which are located along Hwy 21, Hwy 15, Hwy 37 and Hwy 830.

The Alberta Ministry of Transportation provides traffic counts on major highways. Referring to **Figure 2.3**, the most recent 2015 traffic counts by the Province illustrated Average Annual Daily Traffic (AADT) at the following intersections:

Figure 2.3

## CITY OF FORT SASKATCHEWAN TRAFFIC COUNTS

(Source: Government of Alberta)



**1) Hwy 21 at Township Rd 534**

North on Hwy 21 = 23,840

South on Hwy 21 = 24,000

**2) Hwy 15 at Hwy 21**

North on Hwy 15 = 23,300

West on Hwy 15 = 23,440

South on Hwy 21 = 26,230

**3) Hwy 15 at Hwy 37**

East on Hwy 15 = 22,810

South on Hwy 15 = 14,540

West on Hwy 37 = 11,270

**4) Hwy 37 at Hwy 28A**

North on Hwy 28A = 10,320

South on 17th St. = 7,310

East on Hwy 37 = 6,500

West on Hwy 37 = 4,580

**5) Hwy 15 at Municipal Boundary**

North on Hwy 15 = 11,440

South on Hwy 15 = 12,360

**6) Hwy 15 at Hwy 830**

North on Hwy 15 = 8,740

South on Hwy 830 = 2,390

South on Hwy 15 = 11,370

**7) Hwy 830 at Josephburgh**

North on Hwy 830 = 2,590
South on Hwy 830 = 2,640

Traffic patterns closely mirror retail hot spots particularly in the central areas where the largest concentrations of traffic flow are in the range of 23,000 - 26,000 AADT, and for which regional traffic is important for larger format and "Power Centre" type uses.

Incoming traffic flows indicate there is some inflow from rural areas to the northwest, however inflow from the south and west is more significant. The Hwy 21 corridor connecting Fort Saskatchewan to greater Edmonton is the highest trafficked corridor, which bodes well for attracting further retail interest, particularly that which is compatible with Fort Saskatchewan's trade area. However, it should be noted that the majority of this high traffic volume is likely more a commuting workflow than a destination shopping flow.

## 2.8 DEVELOPMENT & BUILDING PERMITS

Over the past several years, Fort Saskatchewan has seen consistent and steady growth in the number of Building Permits issued. While 2016 numbers are still not finalized, it will be of considerable significance to see the effect the current economic situation in Alberta has on the number of new developments in Fort Saskatchewan. A review of data on development and building permits in the City of Fort Saskatchewan over the last several years illustrates a sustained pattern of development activity.

As evidenced in **Figure 2.4**, over the period of 2009-2015, the City of Fort Saskatchewan has exhibited strength, especially in 2014 and 2015, with over 800 permits issued for all types of construction in each of those years. Currently, 2016's numbers are more consistent with the years prior to 2014 and 2015, as illustrated by around 487 permits currently issued for all types of construction. With the 2016 calendar year still not being complete, there is significant likelihood of this number further increasing.

The value of the above noted Building Permits for the current year (2016) through September has amounted to $47.85 million.

Currently in 2016, there have been 20 new construction starts for Commercial developments. Over the period of 2015, there were 44 total new construction starts for Commercial. Over the period 2006 to 2013 the average number of new construction starts for Commercial has been 3.5 per year.

Figure 2.4

## CITY OF FORT SASKATCHEWAN NEW BUILDING PERMITS ISSUED 2009 - 2016

(Source: City of Fort Saskatchewan Residential, Institutional, Industrial & Commercial)

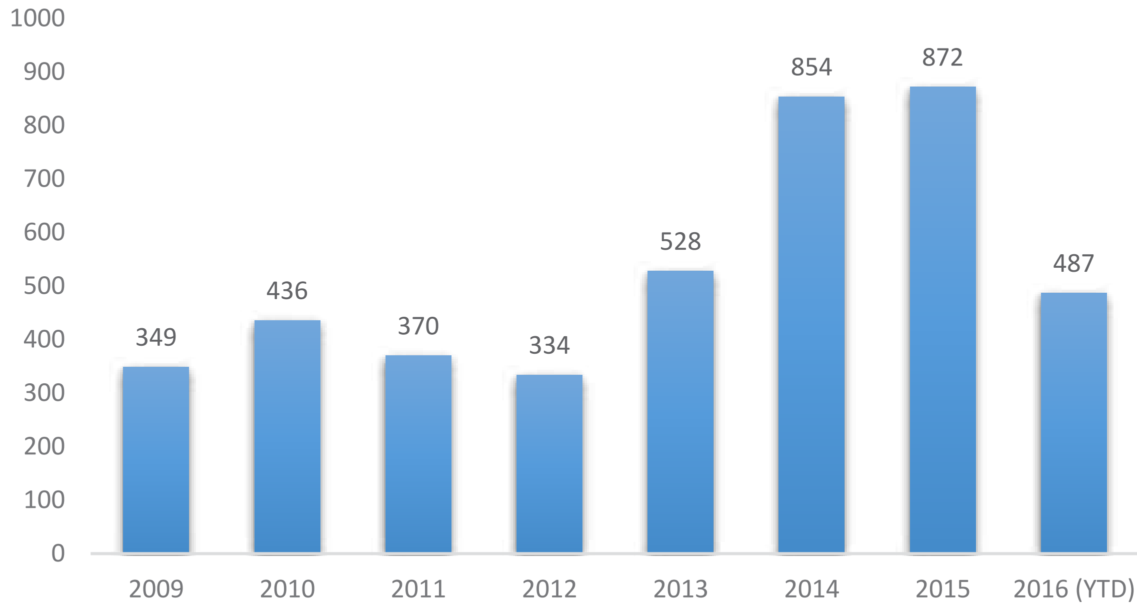



Photo credit: Cushing Terrell Architecture Inc. 2014

# 2

Residential building permits continue to be the primary type of development permits being issued: currently in 2016 the number is 432, with 2015 seeing 742, and 2014 having 776 permits issued for residential.

The importance of residential to retail development is significant, particularly for the development and feasibility of potential additional local or community scale developments.

Overall building permit data shows a growth dynamic that has been strong and steadily increasing over the last several years. With the recent shift in economic activity in Alberta, including the Fort Saskatchewan region, the 2016 numbers do potentially show a slowing of developments, while still being quite strong when looking at numbers historically.

This reinforces the strong growth dynamics of the Fort Saskatchewan market and also illustrates a trend towards a diversified development market as evidenced by the increasing number of multi-family permits which bodes well for future intensification of areas such as the Downtown where multi-family formats will be an integral part of any ongoing enhancement and revitalization.

## 2.9 SUMMARY & IMPLICATIONS

The City of Fort Saskatchewan is a rapidly growing market with strong patterns of residential development supported by retail infrastructure that has responded and continues to respond in step with new demand as the market has grown.

The City has all the necessary criteria to support retail opportunities, though these opportunities may not be represented necessarily by large format retailers for whom Fort Saskatchewan's regional context relative to new emerging major nodes such as Emerald Hills and Manning Park may not be conducive.

Traffic counts, which are in excess of 23,000 to 26,000 vehicles in and around new major nodes does bode well for attracting further branded tenants for whom other areas of the community may not be as lucrative.

As is often the case in retail, tenants will seek to find the best location that will allow them the opportunity to garner sales that can justify rents. In this regard, the City of Fort Saskatchewan as will be seen in **Section 4.0,** provides a range of options for local, regional, and national tenants.

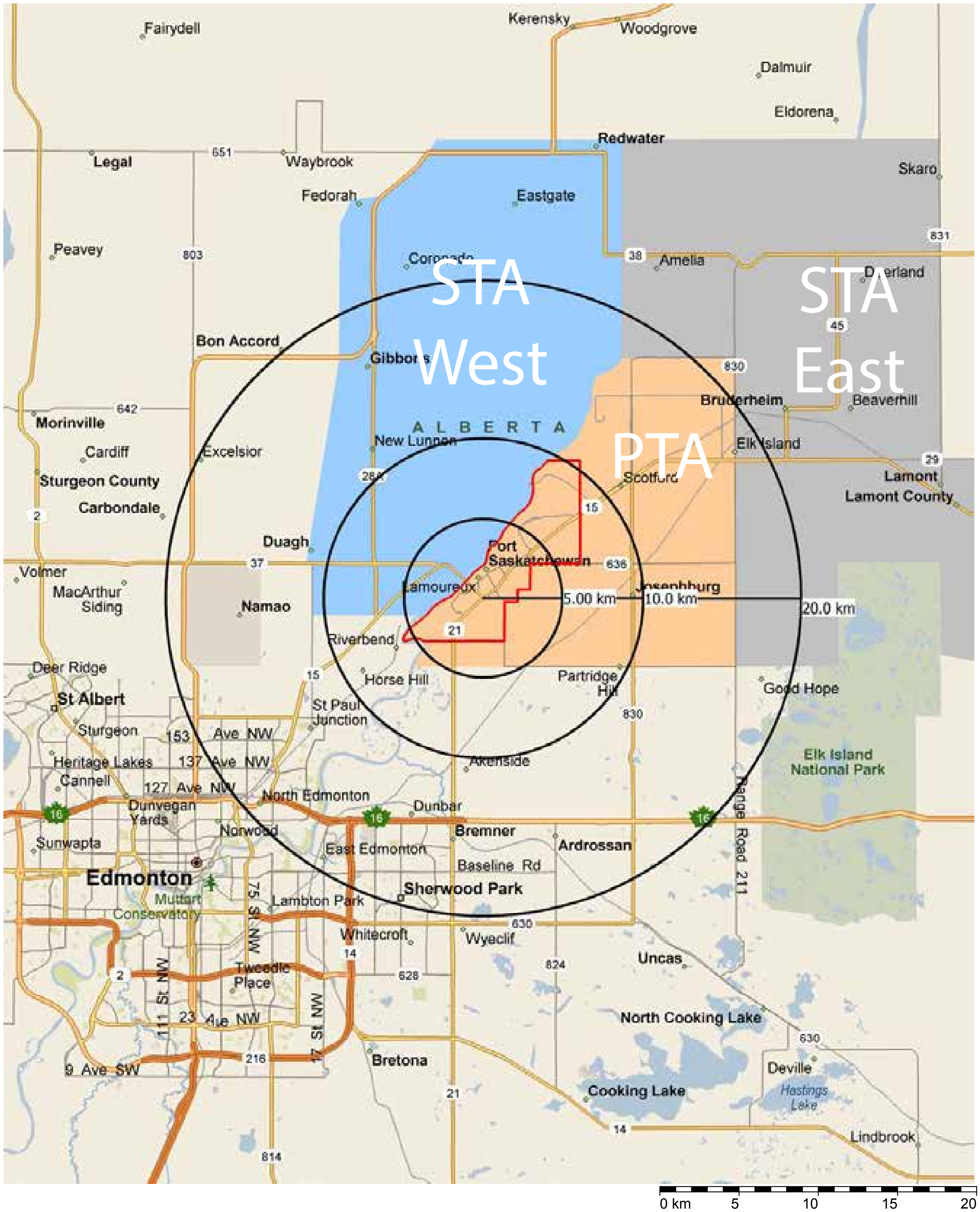
The City continues to be in the midst of economic strength, driven by continued oil and gas exploration, but beyond that the City of Fort Saskatchewan itself has a diversified economy driven by the expansion of Alberta's Industrial Heartland, as well as the emergence of retail itself as an important economic driver.

Mobility to and within the City of Fort Saskatchewan and the various new residential communities being developed in the South and East is allowing for retailers to set up businesses in all nodes of the City including Downtown, where drive times within the city are mere minutes apart when compared to other more congested communities nearby.

With additional Commercial and Industrial developments under construction or planned with service-ready sites, the City is able to accommodate retailers, investors and developers with projects from neighbourhood to community-scale formats.

Figure 3.1

## CITY OF FORT SASKATCHEWAN RETAIL TRADE AREA



# 3 RETAIL TRADE AREA PROFILE

## 3.1 INTRODUCTION

In order to establish a framework for quantifying retail demand and subsequent gaps in the provision of shops and services, it is necessary to delineate and identify the Trade Area from which the City of Fort Saskatchewan's retail sales are most frequently and likely to be sourced and generated.

The Trade Area recognizes drive times and profiles the demographics, spending attributes and competition, which collectively help to shape and inform the market to prospective tenant, developer and investor interests, and ultimately provides a rationalization for achievable market shares attributable to the Trade Area spending segments.

As a first step, a Trade Area was delineated to identify the geographic region from which regular patronage could be expected based on a series of boundary determinants.

The major considerations in delineating a Retail Trade Area are outlined in the following. These principles were applied to the City of Fort Saskatchewan to determine its current Trade Area, as well as to help sensitize future market share inputs from respective Trade Areas.

**Retail Trade Area Determinants**

i. Transportation networks, including streets and highways, which affect access, travel times (**Figure 3.1**), commuting and employment distribution patterns;

ii. Major infrastructure projects both planned or under development which will affect future travel patterns;

iii. The development vision, including an understanding of its site characteristics and potential target audience;

iv. The local and regional competitive environment, present and future;

v. The City's proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;

vi. Significant natural and man-made barriers (e.g. water features, highways and industrial areas);

vii. De facto barriers resulting from notable socioeconomic differentiation;

viii. Patterns of existing and future residential and commercial development; and

ix. Economic realities, such as provincial retail sales taxes.







Photo credit: Cushing Terrell Architecture Inc. 2014

# 3

As mentioned previously, a Trade Area is the geographic region from which the City of Fort Saskatchewan will draw regular patronage from local and regional residents.

Identifying the likely Trade Area is important to understanding the total market potential available to current and future tenants as generated by the local and regional residential base as well as its particular demographic and spending nuances. This provides clues as to the type of retail tenants that are compatible, the amount of retail floorspace supportable in the market, and the current inflow or outflow of retail sales and for which categories such inflow or outflow exists.

A Trade Area is typically subdivided to provide a more refined analysis of the City's retail opportunity.

These subdivisions include a Primary Trade Area from which the majority of retail sales originate, and a series of Secondary Trade Areas, each of which is specifically delineated based on factors such as transportation, population, geographic barriers, etc.

For this particular study, the Retail Trade Area shown in **Figure 3.1** has been cross-referenced and subsequently validated by the Consumer Intercept Survey, which is documented in **Section 6.0**. This Consumer Intercept Survey used postal codes of respondents to confirm and modify the Trade Area as depicted.

The resulting Trade Area for the City of Fort Saskatchewan comprises the following Primary and Secondary Trade Areas:

**Primary Trade Area (PTA)** includes the City of Fort Saskatchewan and the outlying small towns east of the North Saskatchewan River and within an approximate 10 minute drive time, such as Bruderheim and Josephburg.

**Secondary Trade Area West (STA West)** includes the residents of Sturgeon County west of the North Saskatchewan River up to and including the outlying smaller communities such as Gibbons and Redwater.

**Secondary Trade Area East (STA East)** is represented by the smaller towns located east and north of the PTA and includes towns such as Lamont, Beaverhill and other hamlets within Lamont County.

**Part Time residents** for whom Fort Saskatchewan is a temporary home while they work in the Oil & Gas Industry are another "untapped" component of the Retail Trade Area. Although not quantified as part of the full-time residential base, they nonetheless will be profiled in terms of their estimated retail potential and the types of shops and services that they utilize in the city.

## 3.2 POPULATION PROJECTIONS

Using data sources that include the City of Fort Saskatchewan, which recently completed a Municipal Census (2016), Statistics Canada, and Pitney Bowes, population estimates and growth forecasts were tabulated for each of the identified trade areas and further compared to the Edmonton and Alberta averages, where applicable.

Table 3.1

# TRADE AREA POPULATION PROJECTIONS SUMMARY 2016 TO 2026

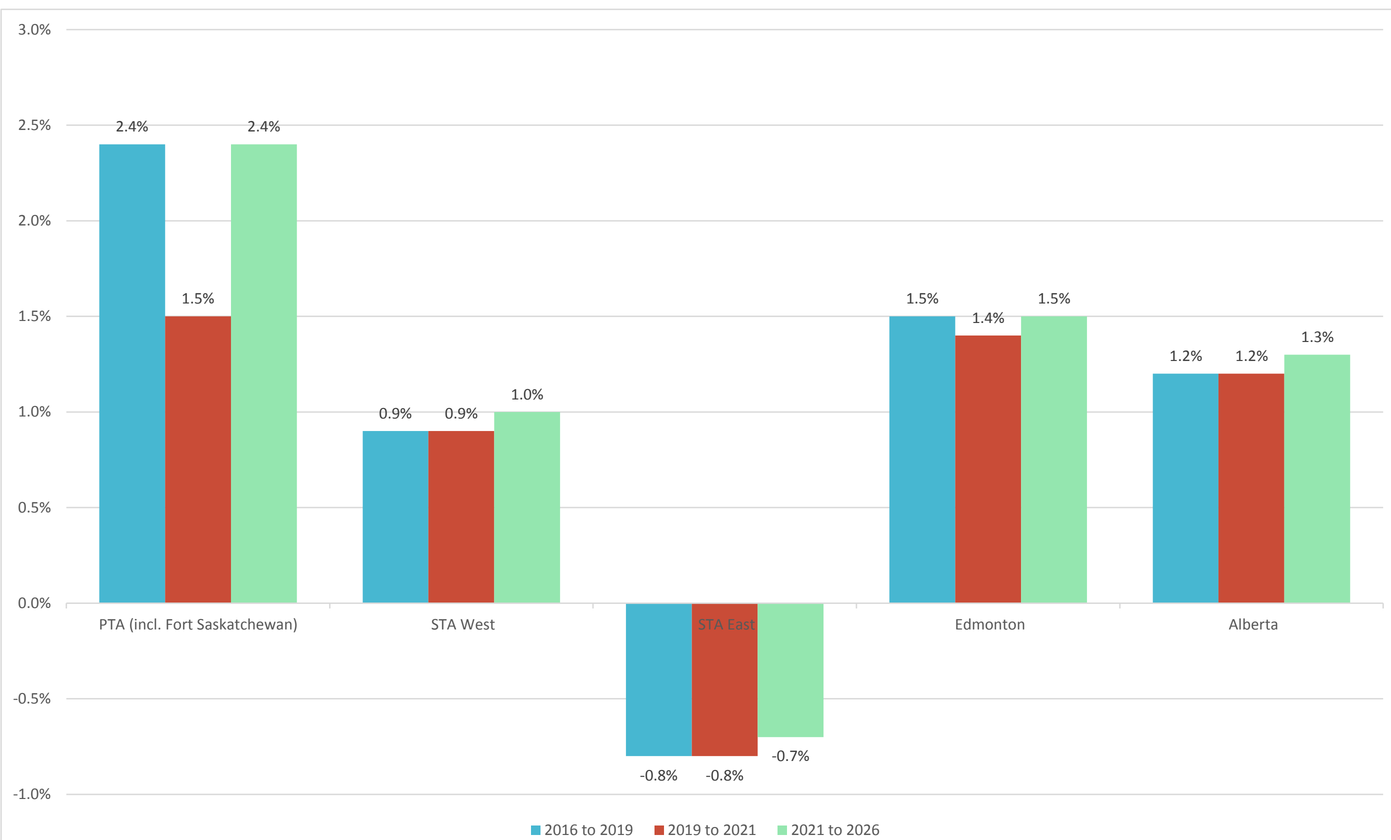
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

| 2016 Estimates and Projections Population Trends | PTA (incl. Fort Saskatchewan) | STA West | STA East | Fort Saskatchewan | Edmonton | Alberta |
|---|---|---|---|---|---|---|
| **Total Population** | | | | | | |
| 2011 Census* | 20,768 | 7,723 | 4,686 | 19,800 | 844,116 | 3,790,185 |
| 2016 estimated | 25,694 | 8,409 | 4,641 | 24,569 | 948,112 | 4,191,020 |
| 2019 projected | 27,595 | 8,643 | 4,534 | 26,412 | 991,107 | 4,346,671 |
| 2021 projected | 28,864 | 8,799 | 4,463 | 27,627 | 1,019,682 | 4,450,158 |
| 2026 projected | 32,472 | 9,260 | 4,307 | 31,108 | 1,098,020 | 4,743,508 |
| **Change in Population (persons)** | | | | | | |
| 2011 to 2016 | 4,926 | 686 | -46 | 4,769 | 103,996 | 400,835 |
| 2016 to 2019 | 1,901 | 234 | -107 | 1,843 | 42,995 | 155,651 |
| 2019 to 2021 | 1,269 | 156 | -71 | 1,215 | 28,575 | 103,487 |
| 2021 to 2026 | 3,608 | 460 | -155 | 3,481 | 78,338 | 293,350 |
| **Change in Population (percent)** | | | | | | |
| 2011 to 2016 | 23.7% | 8.9% | -1.0% | 24.1% | 12.3% | 10.6% |
| 2016 to 2019 | 7.4% | 2.8% | -2.3% | 7.5% | 4.5% | 3.7% |
| 2019 to 2021 | 4.6% | 1.8% | -1.6% | 4.6% | 2.9% | 2.4% |
| 2021 to 2026 | 12.5% | 5.2% | -3.5% | 12.6% | 7.7% | 6.6% |
| **Rate of Change in Population (percent per year)** | | | | | | |
| 2011 to 2016 | 4.4% | 1.8% | -0.2% | 4.4% | 2.5% | 2.1% |
| 2016 to 2019 | 2.4% | 0.9% | -0.8% | 2.4% | 1.5% | 1.2% |
| 2019 to 2021 | 1.5% | 0.9% | -0.8% | 1.5% | 1.4% | 1.2% |
| 2021 to 2026 | 2.4% | 1.0% | -0.7% | 2.4% | 1.5% | 1.3% |
| ** Population counts have been adjusted by MapInfo for census undercounts.* | | | | | | |

Figure 3.2

# RETAIL TRADE AREA POPULATION GROWTH RATES

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)



# 3 46,000+ BY 2026

## TOTAL TRADE AREA POPULATION

While using the City's most recent data for sensitizing projections, for the purposes of this study Cushing Terrell uses the 2016 Pitney Bowes Western Canada data as a baseline, wherever possible.

Using this data allows for better tabulation of the data at the block level for more accurate delineations. While having the most current data projections, it also allows for comparisons across other municipalities and at the Provincial level.

**Table 3.1** provides a breakdown of the Trade Area Population in which the Primary Trade Area is shown to include the municipal boundaries of the City of Fort Saskatchewan. The purpose of this inclusion/exclusion was to allow for the City of Fort Saskatchewan to be isolated as its own demographic subset, thereby allowing for a more refined analysis of the demographics and spending patterns of the City's residents.

Referring to **Table 3.1**, the Total Trade Area (PTA + STA W + STA E) population is estimated to be just over 38,000 in 2016. This population is forecast to exceed 40,000 by 2019 and 46,000 by 2026.

Within the Total Trade Area, the Primary Trade Area (PTA), which as noted includes the City of Fort Saskatchewan, is estimated to have a population of just under 26,000 and is projected to aproach 32,500 by 2026.

Thus, it can be seen the Trade Area's future population growth (**Figure 3.2**) will be driven by the Primary Trade Area and more specifically by the City of Fort Saskatchewan itself.

Over the period 2011 to 2016 (using the City of Fort Saskatchewan's 2016 Municipal Census and the Federal Census adjusted by MapInfo for undercounts), the City of Fort Saskatchewan grew from 19,800 to 24,569 residents, an average annual growth rate of 4.4%. Some comparables to this rate of growth include the City of Leduc which grew at an average annual rate of 3.7%, the City of Spruce Grove at 4.3%, the City of Chestermere at 5.0% and the Town of Okotoks with an average annual growth rate of 3.6%.

All of these markets of comparable sizes are experiencing significant population growth along with the requisite demand and pressures for retail opportunities.

Figure 3.3

## TRADE AREA POPULATION AGE BREAKDOWN

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

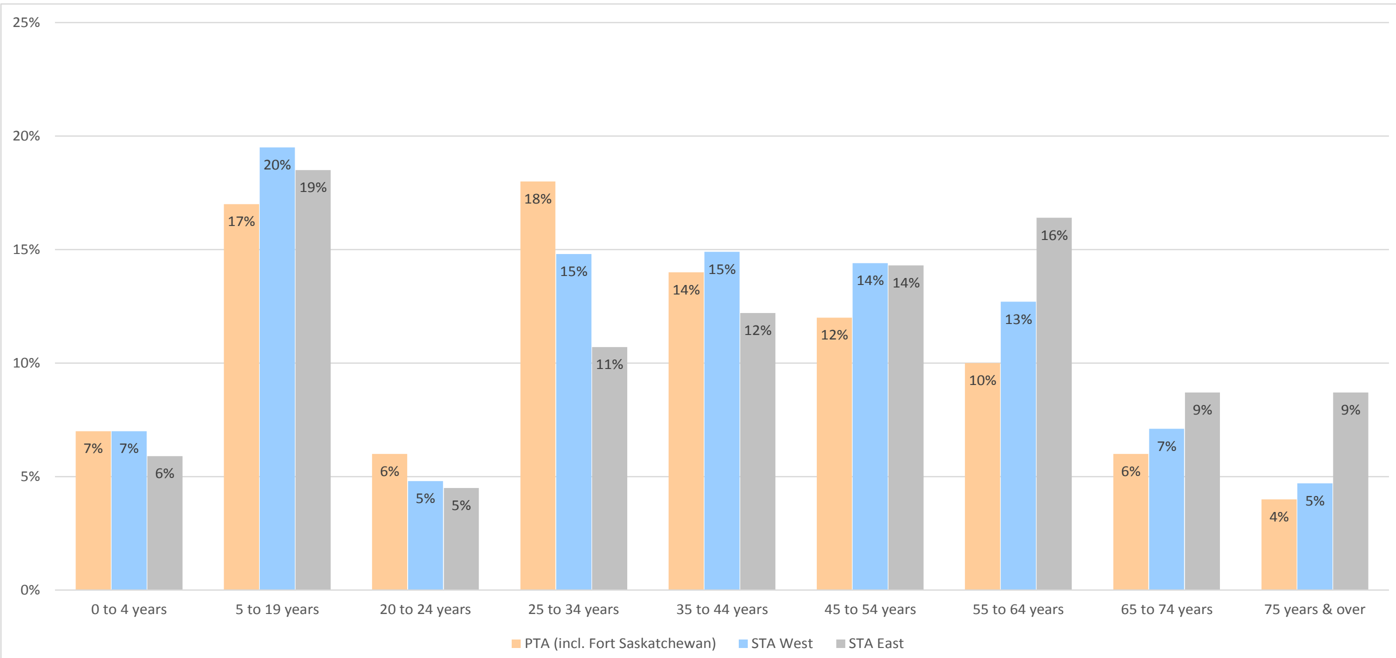



Table 3.2

## TRADE AREA POPULATION AGE BREAKDOWN

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

| 2016 Estimates and Projections Population by Age and Sex | PTA (incl. Fort Saskatchewan) | | STA West | | STA East | | Fort Saskatchewan | | Edmonton | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | % | | % | | % | | % | | % |
| **2016 Estimated Population** | **25,694** | **% base** | **8,409** | **% base** | **4,641** | **% base** | **24,569** | **% base** | **948,112** | **% base** |
| 0 to 4 years | 1,664 | 7% | 585 | 7% | 274 | 6% | 1,605 | 7% | 57,219 | 6% |
| 5 to 9 years | 1,521 | 6% | 572 | 7% | 308 | 7% | 1,472 | 6% | 50,698 | 5% |
| 10 to 14 years | 1,345 | 6% | 527 | 6% | 285 | 6% | 1,279 | 6% | 45,028 | 5% |
| 15 to 19 years | 1,411 | 6% | 543 | 6% | 267 | 6% | 1,333 | 6% | 48,451 | 5% |
| 20 to 24 years | 1,646 | 7% | 406 | 5% | 211 | 5% | 1,596 | 7% | 70,648 | 7% |
| 25 to 29 years | 1,980 | 8% | 541 | 6% | 232 | 5% | 1,933 | 8% | 90,828 | 10% |
| 30 to 34 years | 2,211 | 9% | 706 | 8% | 266 | 6% | 2,150 | 9% | 91,429 | 10% |
| 35 to 39 years | 2,054 | 8% | 642 | 8% | 297 | 6% | 1,991 | 9% | 77,216 | 8% |
| 40 to 44 years | 1,683 | 7% | 613 | 7% | 268 | 6% | 1,620 | 7% | 65,113 | 7% |
| 45 to 49 years | 1,580 | 6% | 603 | 7% | 296 | 6% | 1,489 | 6% | 59,647 | 6% |
| 50 to 54 years | 1,594 | 7% | 605 | 7% | 369 | 8% | 1,505 | 6% | 63,404 | 7% |
| 55 to 59 years | 1,550 | 6% | 605 | 7% | 415 | 9% | 1,448 | 6% | 61,544 | 6% |
| 60 to 64 years | 1,354 | 6% | 466 | 6% | 347 | 7% | 1,249 | 5% | 50,118 | 5% |
| 65 to 69 years | 1,001 | 4% | 382 | 5% | 253 | 5% | 918 | 4% | 37,720 | 4% |
| 70 to 74 years | 660 | 3% | 219 | 3% | 151 | 3% | 612 | 3% | 26,526 | 3% |
| 75 to 79 years | 454 | 2% | 174 | 2% | 139 | 3% | 420 | 2% | 20,159 | 2% |
| 80 to 84 years | 287 | 1% | 113 | 1% | 108 | 2% | 272 | 1% | 15,387 | 2% |
| 85 years and over | 379 | 2% | 107 | 1% | 155 | 3% | 360 | 2% | 16,977 | 2% |

3

# 35.6

MEDIAN AGE IN CITY OF FORT SASKATCHEWAN

(36.7 ALBERTA MEDIAN)

**Figure 3.2** illustrates the strong and dominant growth forecasts for the Primary Trade Area, as driven by the City of Fort Saskatchewan compared to the other retail Trade Areas, as well as compared to Edmonton and Provincial forecasts.

Strong growth in the City of Fort Saskatchewan, which represents the nucleus of the PTA, suggests that support for new retail shops and services will continue to grow, although retail development must occur in step with growth to ensure the appropriate balance for the community in terms of provision of services and retention of existing businesses, particularly local businesses.

The Trade Area dynamics for Fort Saskatchewan are expected to continue. More rooftops and more residents will be seeking opportunities closer to their primary residence, which means that retailers could be in a stronger position to tap into more frequent customers, which has the added benefit of providing more stable revenues.

3.3

## AGE PROFILE

A summary of the current age profile, as documented in **Table 3.2 & Figure 3.3** reveal a very strong family profile with a significant segment in the 5 - 19 year age cohort and young adults entering their high income earning years, with an average age in the City of Fort Saskatchewan of 35.6 years of age.

**Table 3.2** reveals that 32% of the Primary Trade Area's population is currently between the ages of 25 to 44 years. This age cohort represents not only the family building stage, but also the income earning stage. A strong and young family demographic profile is a critical pre-requisite for many retailers looking at entering a market or establishing another location in an existing market.

From a retail perspective, spending on discretionary items such as Automobiles and Recreational Vehicles/Motorsports, Fashion, House & Home, Food & Beverage (away from home), Sporting Goods and Entertainment & Leisure is expected to be quite strong, though admittedly not all of this spending can be captured in Fort Saskatchewan given the high level of mobility of this spending age cohort.

While projects such as Cornerstone and Southpointe are looking to position themselves for these markets, these consumer segments are also becoming increasingly savvy and socially aware of the role that supporting local business has in fostering a sense of place and community.

A Citywide retail study of this nature must realize the role that all retail formats play in the establishment and evolution of a complete community.

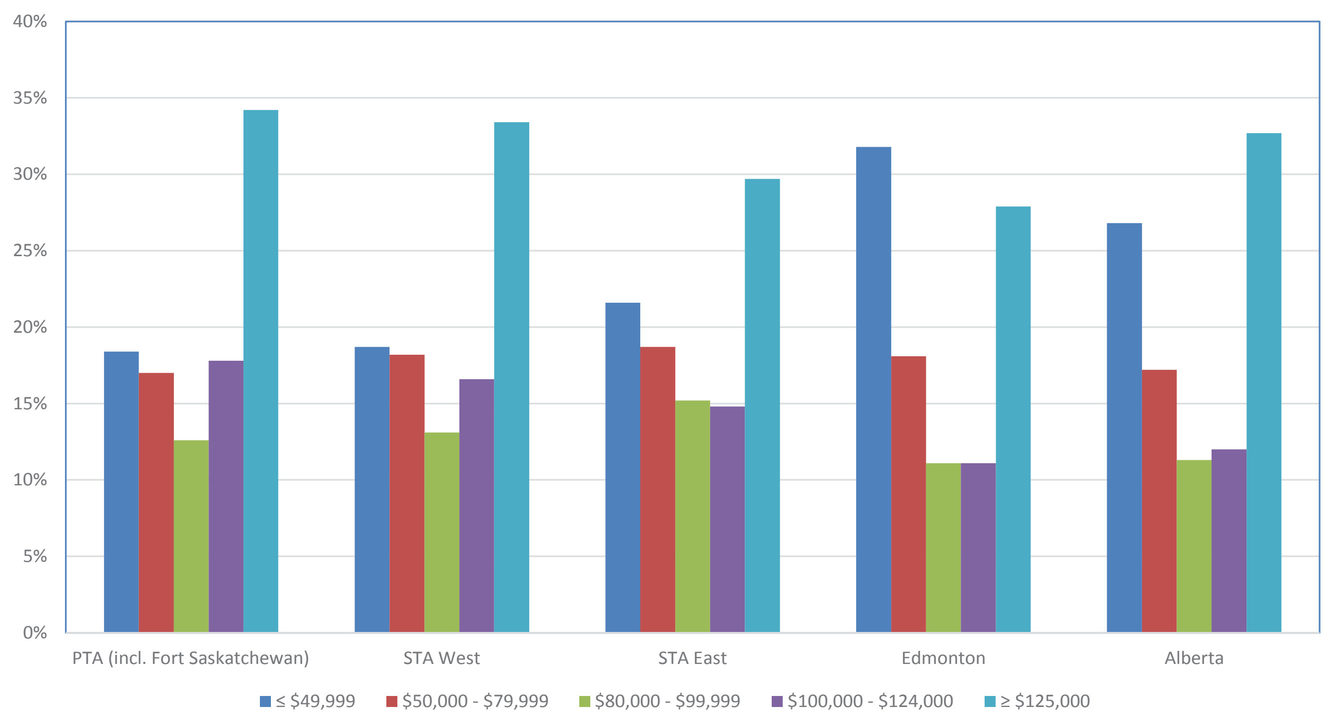


CITY OF FORT SASKATCHEWAN

Table 3.3
## TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

| 2016 Estimates and Projections Income Trends | PTA (incl. Fort Saskatchewan) | STA West | STA East | Fort Saskatchewan | Edmonton | Alberta |
|---|---|---|---|---|---|---|
| **Average household income** | | | | | | |
| 2016 estimated | $ 120,121 | $ 119,384 | $ 112,692 | $ 119,957 | $ 107,713 | $ 119,320 |
| 2019 projected | $ 130,020 | $ 129,167 | $ 119,901 | $ 129,851 | $ 116,837 | $ 129,425 |
| 2021 projected | $ 136,630 | $ 135,685 | $ 124,727 | $ 136,458 | $ 122,926 | $ 136,256 |
| **Aggregate household income ($000)** | | | | | | |
| 2016 estimated | $ 1,135,510 | $ 372,642 | $ 202,182 | $ 1,087,169 | $ 41,129,062 | $ 192,272,648 |
| 2019 projected | $ 1,321,433 | $ 415,980 | $ 212,116 | $ 1,265,264 | $ 46,994,623 | $ 217,463,090 |
| 2021 projected | $ 1,460,773 | $ 446,488 | $ 218,481 | $ 1,399,104 | $ 51,324,456 | $ 236,235,927 |
| **Change in average household income** | | | | | | |
| 2016 to 2019 | $ 9,899 | $ 9,783 | $ 7,208 | $ 9,894 | $ 9,124 | $ 10,104 |
| 2019 to 2021 | $ 6,611 | $ 6,517 | $ 4,826 | $ 6,607 | $ 6,089 | $ 6,831 |
| **Change in aggregate household income ($000)** | | | | | | |
| 2016 to 2019 | $ 185,923 | $ 43,338 | $ 9,934 | $ 178,094 | $ 5,865,561 | $ 25,190,442 |
| 2019 to 2021 | $ 139,340 | $ 30,508 | $ 6,364 | $ 133,840 | $ 4,329,833 | $ 18,772,837 |

Figure 3.4
## TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)



3

# 34%

## PERCENTAGE OF CITY'S HOUSEHOLDS EARNING OVER $125,000 PER YEAR (2016 ESTIMATES)

(32% ALBERTA AVERAGE)

Consequently, some retail nodes will not compete, nor can they, with the previously noted newer and larger comparison retail nodes, but rather a blend of local and branded shops and services could be very well positioned within closer proximity to peoples' primary residences and areas of employment, such as Downtown (Fort Mall redevelopment) or Westpark.

Restaurants, both family-casual as well as brewpub formats are also well-served in being closer to residential areas.

Fort Saskatchewan however, at its core is a bedroom community and many of the residents will still seek shopping opportunities in areas where there is a critical mass of offering. The relative proximity of new nodes such as Emerald Hills and Manning Town Centre as well as other traditional nodes such as the Sherwood Park Mall will continue to attract the strong demographic segment that resides in Fort Saskatchewan, particularly for Department Store Type Merchandise (DTSM) such as Fashion, Electronics and Home Furnishings.

Therefore, Fort Saskatchewan should look to consolidating and focusing on a provision of shops and services that are most compatible and sought by the target demographic profiles, which would include full-service restaurants, conveniences and personal services.

## 3.4 INCOME PROFILE

Household and Per Capita Incomes are among the most direct determinants in identifying patterns of spending and potential thereof for Retail, Food & Beverage, Entertainment and Services.

A summary of the current average Household Income in the Retail Trade Area, as documented in **Table 3.3 and Figure 3.4** reveals an average Household Income in 2016 estimated at over $120,000 in the City of Fort Saskatchewan and its Primary Trade Area, which is higher than both the Provincial average and the City of Edmonton average.

To supplement this Statistics Canada figure, the Consumer Intercept Survey (refer to **Section 6.0**) documented a similar trend whereby over 22.5% of all respondents indicated a household income of higher than $125,000 per annum.

**Table 3.3** also reveals that Household Income in the City of Fort Saskatchewan is forecast to grow at an average annual rate of 2.6% per annum, over the 5-year period 2016 to 2021.

**Figure 3.4** shows the former trend whereby 34% of the PTA households earn over $125,000, which is higher than the rest of the Trade Area, the Province, and the City of Edmonton.

With average household sizes in the Trade Area between 2.6 to 2.7, which is relatively consistent with the provincial average, the income profile illustrates a market that is well positioned to benefit from higher levels of discretionary spending on retail shops and services both in Fort Saskatchewan and outside of the City.

Higher incomes have positive implications for discretionary spending on a variety of goods and services, not the least of which are Fashion, House & Home and Restaurants.

Table 3.4

## TRADE AREA RETAIL SPENDING

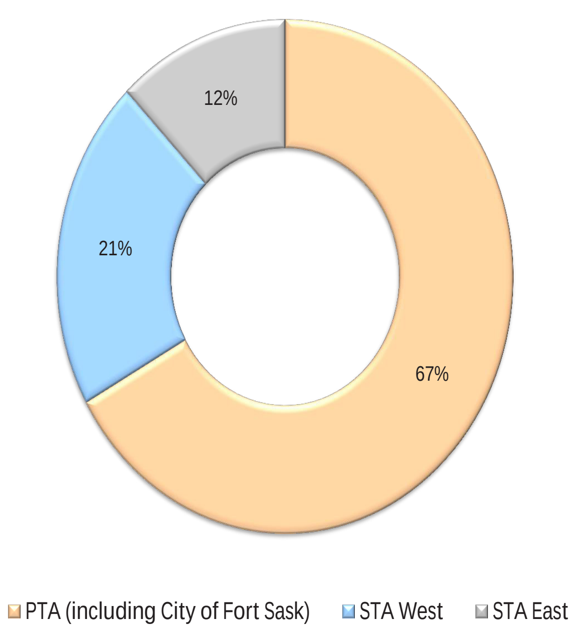
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

| Retail Spending by Merchandise Category | 2016 (Year end estimate) City of Fort Sask Aggregate Retail Spending | City of Fort Sask Temp Workforce | PTA Including City of Fort Sask Aggregate Retail Spending | STA West Aggregate Retail Spending | STA East Trade Area Aggregate Retail Spending | TOTAL Trade Area Aggregate Retail Spending |
|---|---|---|---|---|---|---|
| Grocery & Specialty Foods | $76,714,152 | $3,784,344 | $83,075,400.19 | $26,841,068 | $15,776,562 | $125,693,030 |
| Pharmacy | $7,846,724 | $387,082 | $8,598,610.50 | $3,470,583 | $2,163,456 | $14,232,650 |
| Alcohol & Tobacco | $18,234,025 | $899,493 | $19,730,876.78 | $6,506,161 | $4,158,402 | $30,395,441 |
| Personal Services | $15,871,570 | $782,952 | $17,176,991.82 | $5,100,276 | $2,922,659 | $25,199,927 |
| Clothing & Apparel | $25,968,251 | $1,281,026 | $28,053,121.71 | $7,990,852 | $4,457,372 | $40,501,346 |
| Footwear | $7,743,601 | $381,995 | $8,342,051.39 | $2,442,963 | $1,532,901 | $12,317,915 |
| Jewelry & Accessories | $4,546,788 | $224,295 | $4,886,199.12 | $1,273,493 | $695,785 | $6,855,477 |
| Health & Beauty | $7,387,358 | $364,422 | $7,956,941.75 | $2,367,310 | $1,458,612 | $11,782,863 |
| Home Furnishings & Accessories | $20,474,607 | $1,010,022 | $21,911,213.72 | $5,481,693 | $3,196,262 | $30,589,169 |
| Home Electronics & Appliances | $30,505,664 | $1,504,858 | $32,919,514.36 | $9,727,720 | $5,832,635 | $48,479,869 |
| Home Improvement & Gardening | $8,165,468 | $402,806 | $8,952,854.28 | $3,451,670 | $2,052,928 | $14,457,452 |
| Books & Multimedia | $5,371,772 | $264,992 | $5,807,047.96 | $1,746,324 | $1,061,797 | $8,615,169 |
| Sporting Goods & Recreation | $4,228,044 | $208,571 | $4,560,971.33 | $1,434,256 | $777,322 | $6,772,549 |
| Toys & Hobbies | $3,628,055 | $178,974 | $3,902,693.63 | $1,175,774 | $795,442 | $5,873,910 |
| Miscellaneous Specialty | $10,743,544 | $529,984 | $11,565,735.92 | $3,732,217 | $2,435,247 | $17,733,200 |
| Full-Service F&B | $11,387,781 | $561,764 | $12,295,447.98 | $3,563,510 | $1,999,367 | $17,858,325 |
| Limited Service F&B | $10,511,798 | $518,552 | $11,349,644.29 | $3,289,394 | $1,845,570 | $16,484,608 |
| Entertainment & Leisure | $14,268,476 | $703,870 | $15,337,606.44 | $4,652,662 | $2,225,062 | $22,215,331 |
| Auto Parts & Accessories | $6,074,883 | $299,677 | $6,712,212.77 | $2,959,925 | $1,630,746 | $11,302,884 |
| Auto/RV/Motorsports Dealership | $54,092,711 | $2,668,418 | $59,423,714.18 | $20,003,925 | $11,235,840 | $90,663,479 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$343,765,275** | **$16,958,098** | **$372,558,850** | **$117,211,777** | **$68,253,968** | **$558,024,595** |

Figure 3.5

## TRADE AREA RETAIL SPENDING BY TRADE AREA

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)




# ~67%

### CITY OF FORT SASKATCHEWAN RESIDENTS' SHARE OF TOTAL TRADE AREA SPENDING

# 3 $550 Million

## TOTAL TRADE AREA RETAIL SPENDING IN 2016 (YEAR END ESTIMATE)

3.5
### PART TIME RESIDENT PROFILE

As noted previously, the Oil & Gas industry in and around Fort Saskatchewan has created an additional demographic segment that similarly seeks local shops and services. While the types of shops and services may differ from those of the full-time resident base, this segment of part-time or temporary residents regardless has an impact on retail demand.

The Consumer Intercept Survey of the part-time resident base yielded a profile that is best characterized by a demographic dominated by males in the two age cohorts of 18-24 years and 45-54 years. This is a representation of a demographic who either do not have children yet or have children who have "left the nest". As such, they will be spending their disretionary income predominantly on themselves. This yearly income of the part-time residents is very high whereby 25% earn between $100,000 and $125,000, and a further 30% earn over $125,000.

Since a large share of these part-time residents stay at hotels in Fort Saskatchewan, estimates suggest that there are approximately somewhere in the range of 1,000 - 1,250 of these part-time residents that are in essence an additional piece to the Trade Area. This figure is down from an estimated 2,500 plus as documented in the original study (2014).

3.6
### RETAIL SPENDING PROFILE

Building upon the Trade Area demographic profile analysis, an assessment was made of the Trade Area's retail spending profile. This provides a more refined understanding of the opportunity for retailing within the City of Fort Saskatchewan.

The key questions it seeks to answer are:

- How much do Trade Area residents spend on Convenience retail (such as Grocery and Pharmacy), on Comparison retail[1] (such as Fashion and Home Furnishings), and Leisure (Food & Beverage and Entertainment)?
- What spending patterns or trends does the Trade Area expenditure profile demonstrate? And how is spending forecast to change over the coming years?
- What types of retail goods and services are garnering inflow of sales dollars and which categories are exhibiting outflow of sales (or leakage)?

Detailed information of retail spending within the Trade Area was collected from the Conference Board of Canada and Pitney Bowes, a leading supplier of demographic and consumer expenditure information. Data was collected at a detailed micro-geographic scale for individual street blocks. This data was then aggregated to each respective Trade Area in order to build a spending profile, that is specific to each respective Trade Area.

Each of the major three categories of spending (Convenience, Comparison and Leisure) was assessed at a detailed category-by-category level, then aggregated into major categories.

The initial task involved developing an understanding of how each of the delineated Trade Area residents spend their shopping and leisure dollars on a per capita basis for each of 20 merchandise categories.

*[1] Comparison Retail comprises retail categories that one would usually compare prices or shop around. Examples include Automobiles, Fashion, Footwear, House & Home, Books, Specialty Retail. The term Comparison Retail is synonymous with the Industry Term DSTM, which refers to Department Store Type Merchandise or GAFO, which refers to General Merchandise, Apparel Accessroies, Furniture and Other Stores.*

Figure 3.6

## TRADE AREA RETAIL SPENDING SUMMARY 2016

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

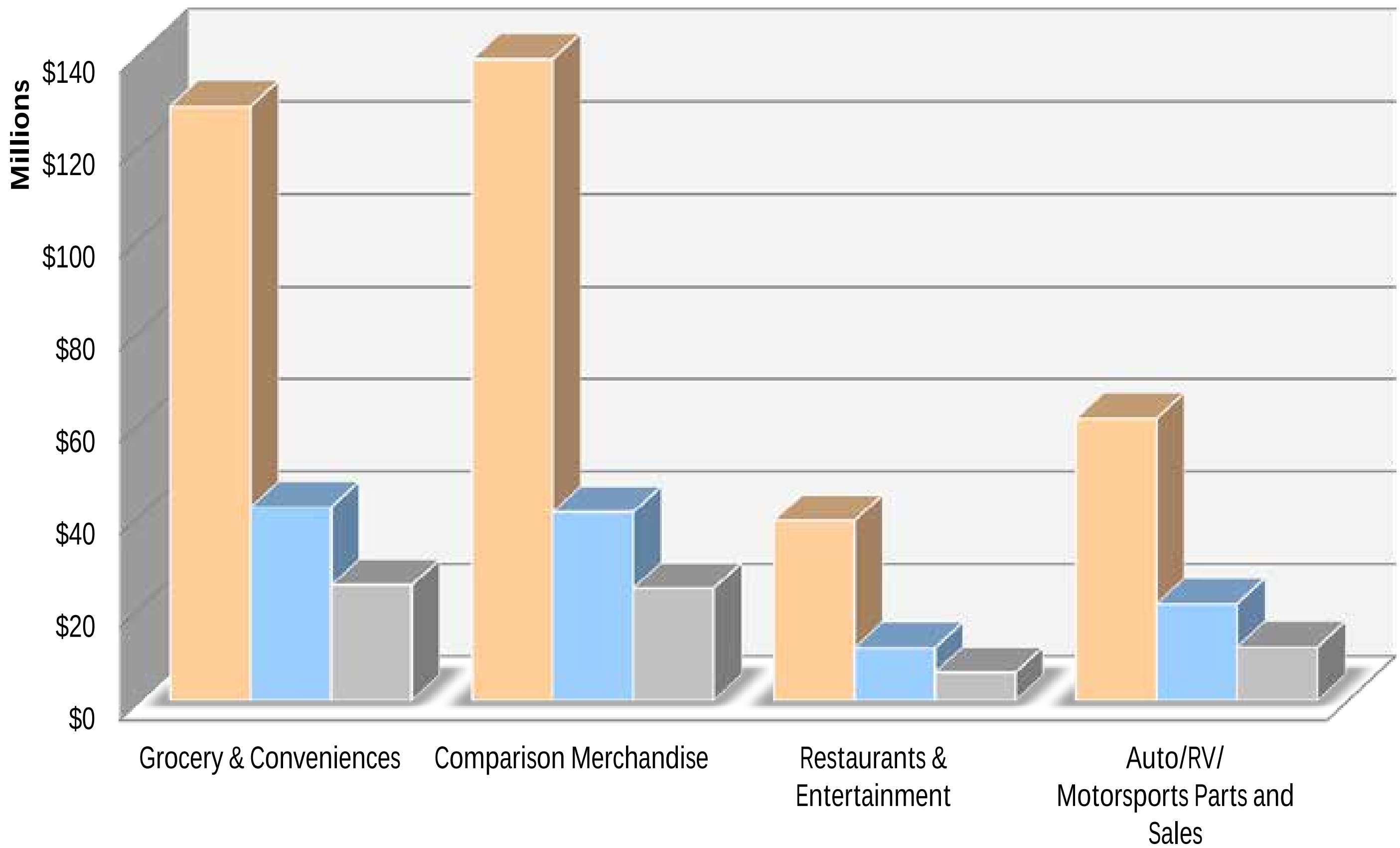
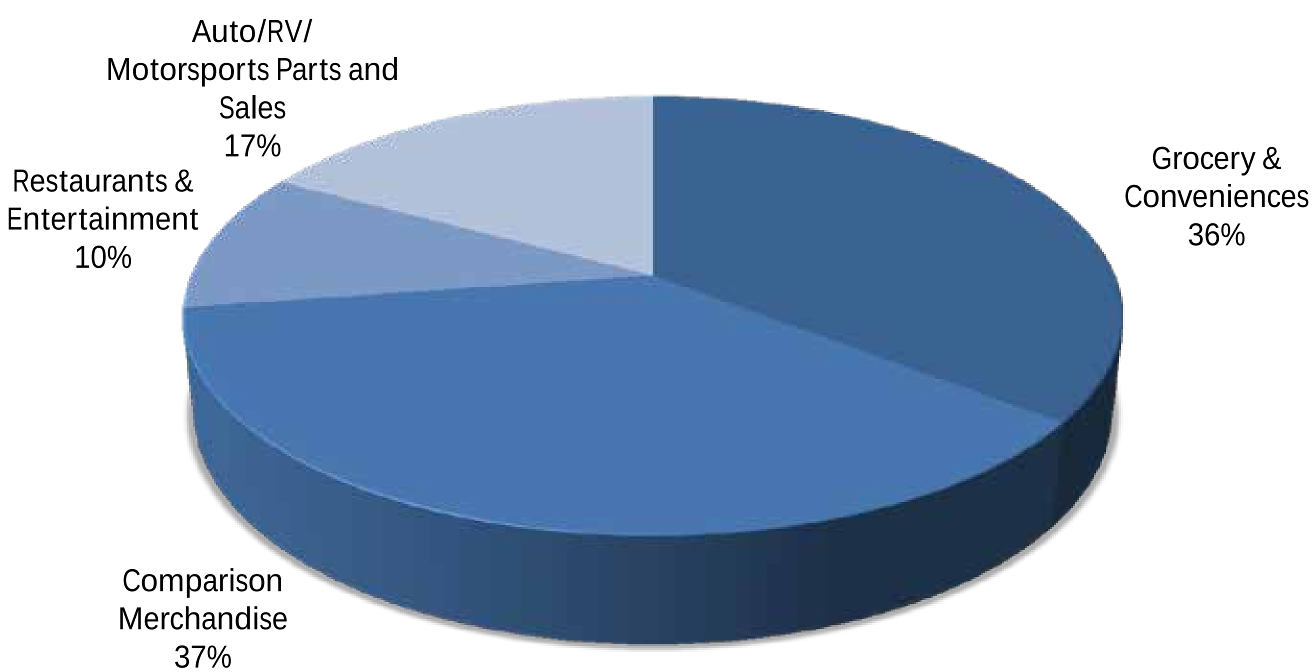



Figure 3.7

## TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)



Once this Trade Area spending profile was established, the data was aggregated by population to quantify the total size of the Trade Area's retail market.

Having established the Trade Area boundaries, population and demographic profile, the size of the retail market and its anticipated growth was projected using retail spending data from Pitney Bowes.

As illustrated in **Table 3.4**, the Total Trade Area for the City of Fort Saskatchewan is estimated at $550 Million (2016 year end estimate).

The fact that Fort Saskatchewan is a more locally-driven retail node, as opposed to regional, is evidenced in the fact that over 67% of the Trade Area retail spending originates from the Primary Trade Area, of which 62% comes from City of Fort Saskatchewan residents alone.

Additionally, given the proximity of Strathcona County and its new large-scale retail developments on the north side of the County combined with new developments in Northeast Edmonton, the ability of Fort Saskatchewan to tap into spending further south is limited.

Part-time residents represent an approximate $40 Million market. During their residency in Fort Saskatchewan they have a propensity to spend the majorityof their income on Grocery, Personal Services and Food & Beverage. It is these critical segments that the City of Fort Saskatchewan should ensure it has the proper provisions.

Retail spending on Comparison Merchandise by Trade Area residents is very strong and when combined with the Auto/RV/Motorsports categories, reinforces the strength of the market's disposable and discretionary income.

Moreover, healthy patterns of spending on categories such as Clothing, Footwear, Jewelry, House & Home, Computers & Electronics, etc. provide a benchmark against which prospective tenant, developer or investor interests could gauge the opportunity, though as mentioned most of the larger retailers are likely to look at Emerald Hills and Manning Town Centre before Fort Saskatchewan.

Regardless of where residents spend their money, The Top 5 retail spending categories for the Total Trade Area are:

1. *Grocery & Specialty Foods - $125.7 Million*
2. *Auto/RV/Motorsport - $90.7Million*
3. *Home Electronics & Appliances - $48.5Million*
4. *Clothing & Apparel - $40.5Million*
5. *Full & Quick Service Restaurants - $34.3 Million*

Another noteworthy category of spending, which ranks only marginally behind Full & Quick Service Restaurants is Home Furnishings ($30.6 Million).

## 3.7 SUMMARY & IMPLICATIONS

Fort Saskatchewan's Retail Trade Area reflects a realistic look at where the majority of customers are likely to come from and on what shops and services they are most likely to spend their money.

Both Emerald Hills and Manning Town Centre are in the midst of developing significantly sized retail developments with strong clusters of destination and Department Store Type Merchandise. Each of these projects has Fort Saskatchewan as part of their Primary Trade Area and thus it would be difficult for the City of Fort Saskatchewan to compete directly against these emerging strong retail nodes.

Tamarack Brewery, Montana | designed by Cushing Terrell Architecture Inc.

3

Therefore, the Retail Trade Area for Fort Saskatchewan must be realistic and not overstate the area against which it will compete.

Accordingly, the Retail Trade Area for the City of Fort Saskatchewan is a reflection of the competitive influences as well as a realization that residents of Fort Saskatchewan and the communities north, west and east will still like the convenience and accessibility that Fort Saskatchewan provides for a critical mass of more neccessity-based merchandise, while not discounting the need for more essential comparison items.

The Trade Area Demographic Profile illustrates a very strong local trade area that will grow from over 38,000 in 2016 to approximately 46,000 over the next decade.

Fort Saskatchewan's strengths lie in its demographics, which are substantiated by a significant household income well above the regional and provincial averages.

Secondly, the Trade Area has a strong and dynamic young family profile who are both mobile in their shopping patterns, yet are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

Overall, Fort Saskatchewan represents a $550 Million retail market (2016 year estimates) in which categories such as Grocery, Automotive/RV, Home Electronics & Appliances, Clothing & Apparel, and Restaurants represent significant spending segments.

As will be seen in forthcoming sections, Fort Saskatchewan's retail demand and prospects for retail growth will mirror the propensity of residents to spend their dollars in their own community versus outside (i.e. retained spending versus outflow).

For Fort Saskatchewan to be a successful retail market it will require the right mix of shops and services and right-sizing to accommodate realistic demand expectations.

Photo credit: Cushing Terrell Architecture Inc. 2014

# 4 RETAIL MARKET SUPPLY

## 4.1
## INTRODUCTION

The dynamics of the overall retail market provide critical indicators as to the performance of the retail and moreover the magnitude of demand and resulting opportunity for which niches could be filled.

This section will provide a detailed picture of the overall Citywide retail mix comprising a detailed inventory of the retail centres/nodes and tenants therein that make up the City of Fort Saskatchewan's retail market.

To further assess the level of retail supply, a comprehensive inventory and evaluation was conducted with respect to locations, format and amount of space (**refer to Appendix A** for detailed inventory listing). This evaluation creates a foundation upon which retail "gaps" could be quantified and determined.

The inventory will reflect current as well as proposed or future retail centres/nodes, such that the City can be understood relative to competitive influences and potential tenant opportunities today and into the near future.

The purpose of the competitive evaluation is to firstly identify a foundation for demand and current retail performance (also known as retail sales productivity) followed by identifying the potential types of tenants and/or merchandise categories for whom Fort Saskatchewan could represent a compatible fit.

## 4.2
## REGIONAL RETAIL MARKET CONTEXT

The northeast Edmonton region has three major retail nodes that create competitive alternatives for shopping outflow within Fort Saskatchewan's Retail Trade Area. In total, these three nodes currently represent about 1.67 million sq. ft. of retail space, though at buildout this figure will increase to over 2.0 million sq. ft. These include the following:

**1. Manning Town Centre/Clareview Centre**

Manning Town Centre is a new regional retail node located approximately 20 kilometers (about 15 minute drive) southwest of Fort Saskatchewan and at buildout will have over 800,000 sq. ft. of retail. Major retailers in this node include Cabela's Cineplex, and SportChek.

**2. Emerald Hills Centre**

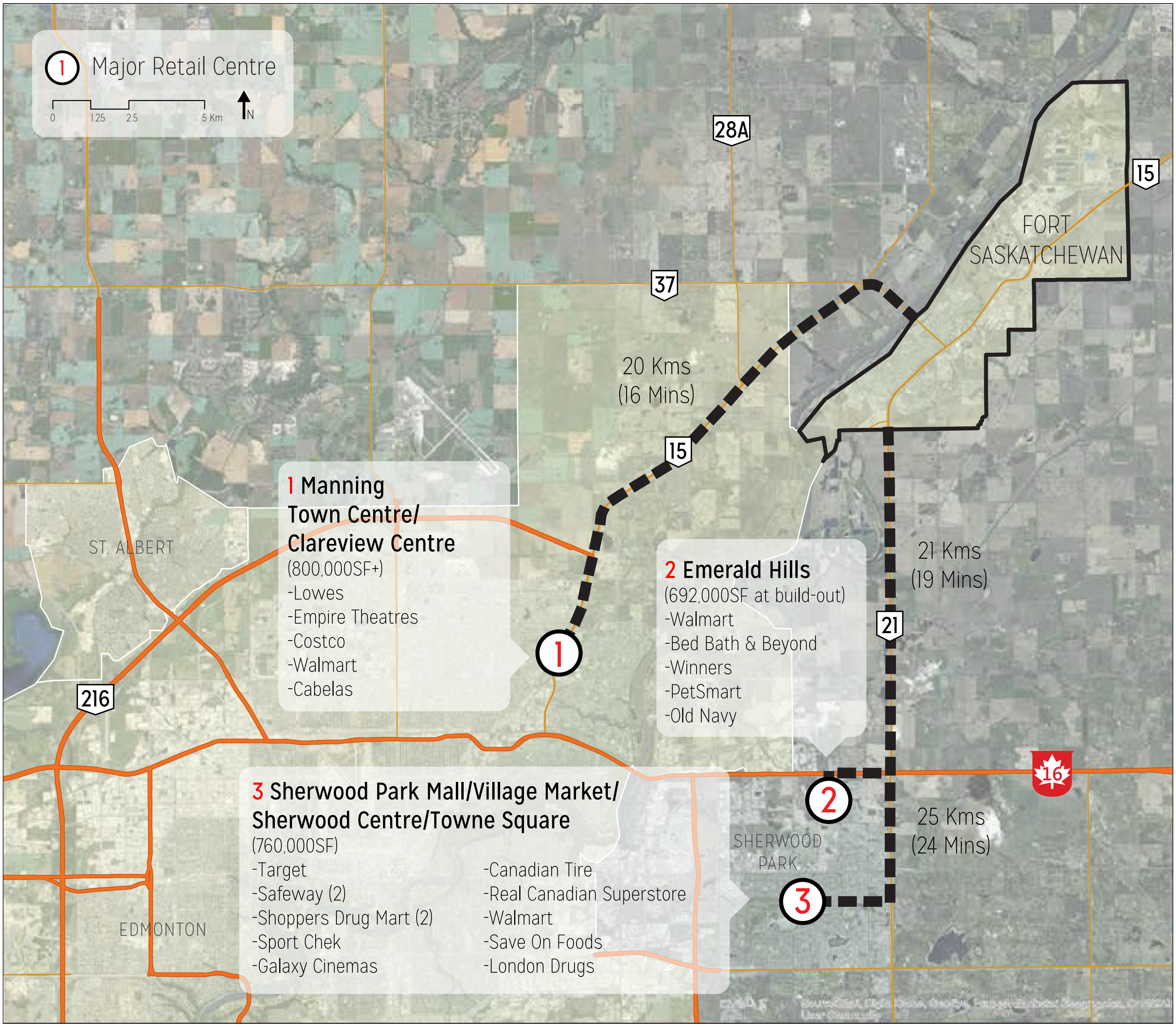
At 21 kilometers away, Emerald Hills Centre is another new major regional retail node and about 15 minute drive time from the City of Fort Saskatchewan. Walmart, Bed Bath & Beyond, Winners, PetSmart, Wine & Beyond and Old Navy are major tenants, though many more are planned. Emerald Hills is estimated to be approximately 840,000 sq. ft. at buildout.

**3. Sherwood Park Mall/Village Market/ Sherwood Centre/Towne Square**

These four clusters combine to offer about 760,000 sq. ft. of retail space, and are spread out along the major corridors of Sherwood Drive, Wye Road and Baseline Road in Sherwood Park.

Figure 4.1

## FORT SASKATCHEWAN REGIONAL RETAIL MARKET CONTEXT



# 4

Sherwood Park Mall is a regional enclosed centre located approximately 25 kilometers, or about 25 minutes drive from Fort Saskatchewan. According to the Consumer Intercept Survey, Sherwood Park Mall continues to be a major comparison shopping destination for residents of Fort Saskatchewan. Over twenty percent (21.5%) of Survey Respondents indicated that Sherwood Park Mall was their Primary Comparison (or DSTM) shopping destination. Anchoring the 430,000 sq. ft. mall include Safeway, Shoppers Drug Mart, Chapters, and Cineplex, among others.

Sherwood Towne Square, also approximately 25 minutes away is the location of the nearest Real Canadian Superstore to Fort Saskatchewan. This location suggest that perhaps Real Canadian Superstore may be considered as a potential target tenant for Fort Saskatchewan, given its current store network strategy. Village Market and Sherwood Centre front either side of the east-west Wye Road corridor and are home to Canadian Tire and a Walmart Supercentre, as well as several medium-format retailers that are also located in Fort Saskatchewan.

**Figure 4.2** clearly illustrates the concentrations of retail activity along Highways 15 and 21, which are highlighted by Power Centres such as Cornerstone and Southpointe, freestanding retailers such as Walmart, Home Depot and Canadian Tire as well as Shoppers Drug Mart, Safeway and Staples.

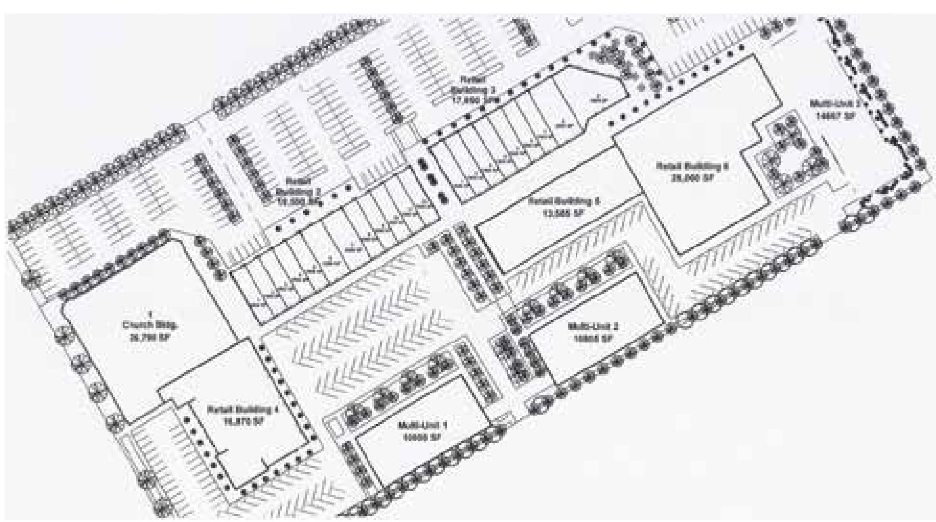
The following provides brief narratives on the major projects planned or currently under development in the City of Fort Saskatchewan that are ready to accommodate potential retailers.

**Fort Station**

On the site of the former Fort Mall, Fort Station is a newly re-developed/re-positioned retail node featuring a variety of tenants, including a clothing company, a liquor store, a brew house, and a recreational trampoline facility, among others. Currently open businesses comprise a total of over 30,000 sq. ft.

4.3
## RETAIL PROJECTS

**Figure 4.2** documents and highlights the major retail nodes and projects in the City of Fort Saskatchewan. This diagram also includes areas of future development.



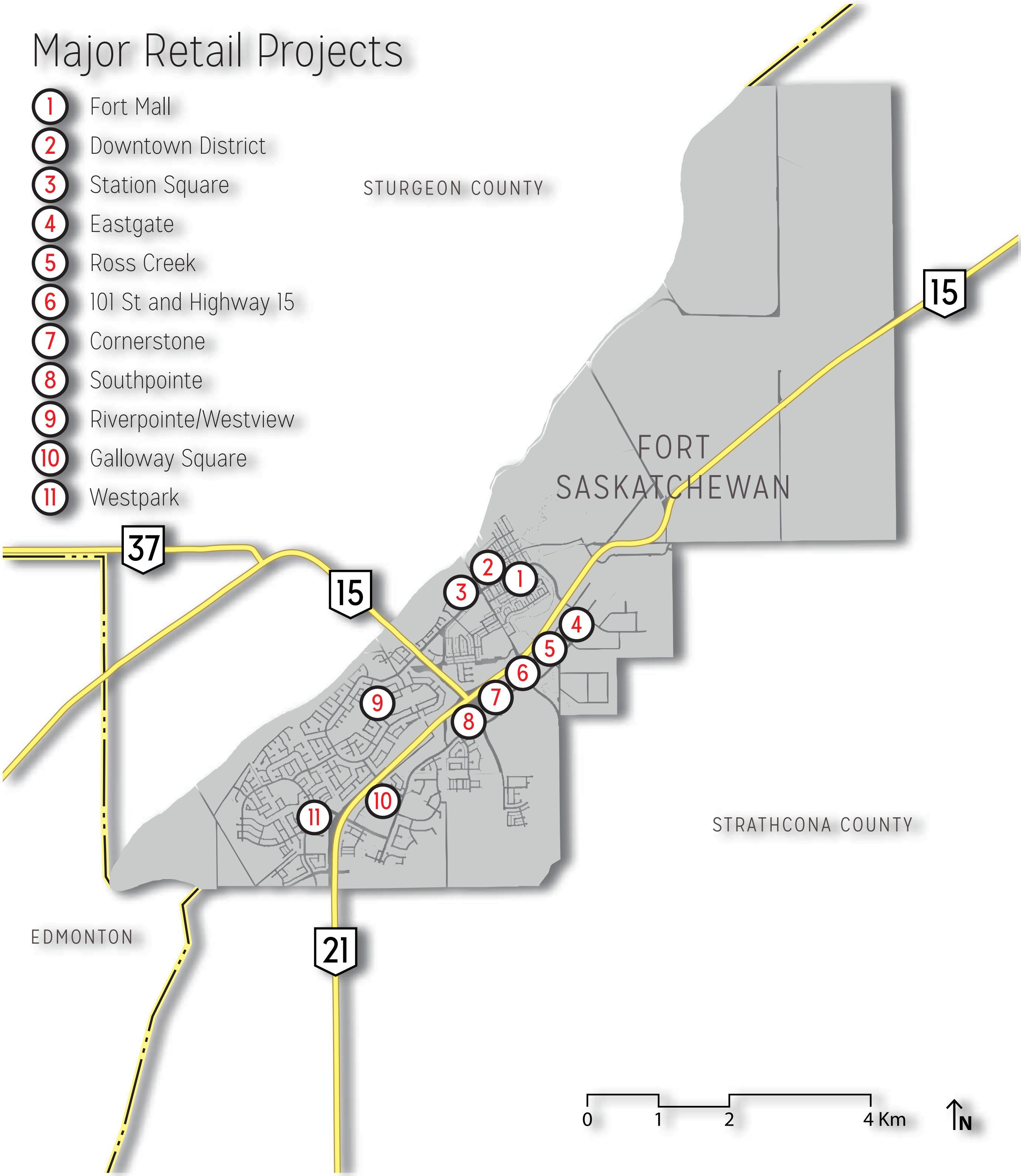



CITY OF FORT SASKATCHEWAN

Figure 4.2

## CITY OF FORT SASKATCHEWAN RETAIL INVENTORY & PROJECTS

(Source: City of Fort Saskatchewan, Cushing Terrell Architecture Inc)



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The Fort Mall was a vehicle-oriented suburban retail environment surrounded by lower density residential uses. As of December 2014, the site is under constrution with redevelopment plans calling for a horizontally mixed-use retail commercial and multi-family residential development. The plan calls for conversion of the formerly enclosed centre to an outward-facing externalized retail environment, which will provide higher quality retail units with much improved visibility to Downtown vehicular and pedestrian traffic.

The City's Land Use Bylaw was amended to accommodate for standalone residential uses on the roughly twelve (12) acre site. The new "C5 - Fort Mall Redevelopment District" was specifically requested and prepared to accommodate the project. The site was subsequently subdivided to accommodate the mix of uses.

**Downtown District**

Vibrant and progressively evolving, Fort Saskatchewan's downtown is an approximate 20 hectare (50 acre) commercial district comprised of smaller-format retail, office and residential uses set in an urban core. One- and two-storey street fronted buildings contribute to a traditional retail environment conducive to window shopping and pedestrian activity. General policy direction for the downtown is to promote local neighbourhood servicing retail and office commercial uses.

An ongoing revitalization effort began in 2008 with City Council's direction to complete a Downtown Area Revitalization Plan (DARP). Projects are championed by the Downtown Redevelopment Advisory Committee (DRAC) and the Downtown Business Council, who both guide business improvement efforts in the Downtown Redevelopment Area.

One example is the Downtown Storefront Program that incentivizes businesses to improve their street-facing facades. A $10 million streetscaping and infrastructure improvement project was also completed in 2010.

**The Downtown, as with many others across the region, province, and country are succeptible to external competitive pressures for retail growth. Therefore, it will be important as the city grows to ensure the Downtown vibrancy and vitality that the City and its businesses have worked so diligently to maintain is not adversely impacted by unnecessary retail developments on the periphery of the City, except where clearly not compatible with the Downtown.**

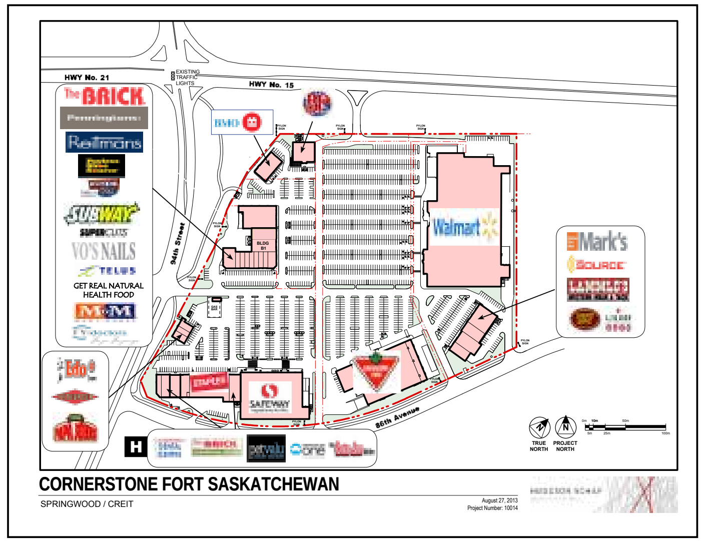
**Station Square**

Station Square is an approximately 3.5 hectare (9 acre) retail cluster adjacent to downtown. Major tenants include a CO-OP grocery, TD Canada Trust, ATB Financial, and Snap Fitness.

A largely vehicle-oriented, neighbourhood-serving strip centre, Station Square benefits from adjacency to downtown and the City's residential neighbourhoods. A recently built three-storey structure provides additional service-oriented retail and office space.

**Eastgate Plaza**

Eastgate Plaza is an older, smaller 1.2 hectare (3 acre) retail node fronting Highway 15 in the northern part of the City. This older development comprises approximately 35,000 sq. ft. of vehicle-oriented commercial space, a roughly 20,000 sq. ft. home improvement store and a 15,000 sq. ft. auto dealership. Eastgate Plaza itself is a small piece of the much larger Eastgate Business Park, an older, established light industrial district.




## Ross Creek Crossing

Ross Creek Crossing is a retail development of about 8 hectares (20 acres) with roughly 45,000 sq. ft. of vehicle-oriented retail. Ross Creek has available vacant land between two commercial strip centres with good visibility and accessibility from Highway 15, creating potential for future retail development. A new medical office building offers a small pharmacy to serve the neighbourhood.

## 101 Street and Highway 15

This 10 hectare (26 acre) development is sandwiched between the Cornerstone Power Centre and Ross Creek. Various commercial uses such as hotels, self-storage, a No Frills grocery and Winners Way Source For Sports currently occupy space in this development, which also benefits from excellent highway visibility and access. There is currently some infill land available.

## Cornerstone

Cornerstone is a large retail power centre with the most square footage of national and branded tenants in Fort Saskatchewan. At 13 hectares (32 acres) and with over 385,000 sq. ft. of retail space, and approximately 30 tenants, Cornerstone offers a multi-destination retail option for consumers in the Trade Area. Walmart, Canadian Tire, Staples and Safeway are the centre's anchor tenants. For residents of Fort Saskatchewan, Cornerstone which includes a Safeway, is the most preferred convenience retail node as indicated by 63% of Consumer Survey respondents' responses.

## SouthPointe

This 13.5 hectare (34 acre) development consists of about 140,000 sq. ft. of retail space with 17 national and branded tenants, including Home Depot, Shoppers Drug Mart, Starbucks, Domino's Pizza, and Original Joe's.

SouthPointe currently has 6 parcels totalling 6 hectares (15 acres) of vacant commercially-zoned land, suggesting SouthPointe is one of the most prominent locations for future vehicle-oriented commercial shopping centre growth.

Recent retail additions to the SouthPointe shopping area include a Co-op Gas & Convenience Store, and a Kal Tire vehicle shop; a 24,000 sq. ft. Goodlife Fitness is anticipated to open in 2017.

## Riverpointe/Westview

Located in isolation from the other major retail clusters in Fort Saskatchewan, Riverpointe/ Westview is a small neighbourhood-serving strip centre. With about 13,000 sq. ft. of retail space in Riverpointe and another 28,000 sq. ft. in Westview, retailers in this collective node average about 1,900 sq. ft. Currently there is vacant space available for lease at Riverpointe.

# 4 1.19 million sf

## CITY OF FORT SASKATCHEWAN'S RETAIL INVENTORY

**Galloway Square**

Galloway Square is a new retail development of around 15,000 sq. ft. on about one hectare (2.4 acres) of land. Included in this development are two full-service restaurants associated with hotels (Ricky's Grill and Montana's).

**Westpark**

Westpark is a new, developing retail node near the south entrance to the City that includes three commercial corners at a major intersection of Highway 21. The Westpark node, being developed by Qualico, currently has approximately 19 retailers with a further 70,000 + sq. ft. of retail proposed. At build-out Westpark will be a mixture of neighbourhood-serving and community-scale retail tenants.

The retail component of Westpark is being developed to coincide with the development of an adjacent large residential neighbourhood.

As is common in a market the size of Fort Saskatchewan, retail developments in the City represent a wide range of formats with new developments being provided at the community and neighbourhood scale such as Cornerstone/Southpointe, Westpark and Station Square respectively.

As the Fort Saskatchewan market continues to grow and evolve and new developments become more appropriate for tenants, the Downtown area and Fort Station (previously Fort Mall) have become revitalized and rebuilt in an attractive manner.

Table 4.1

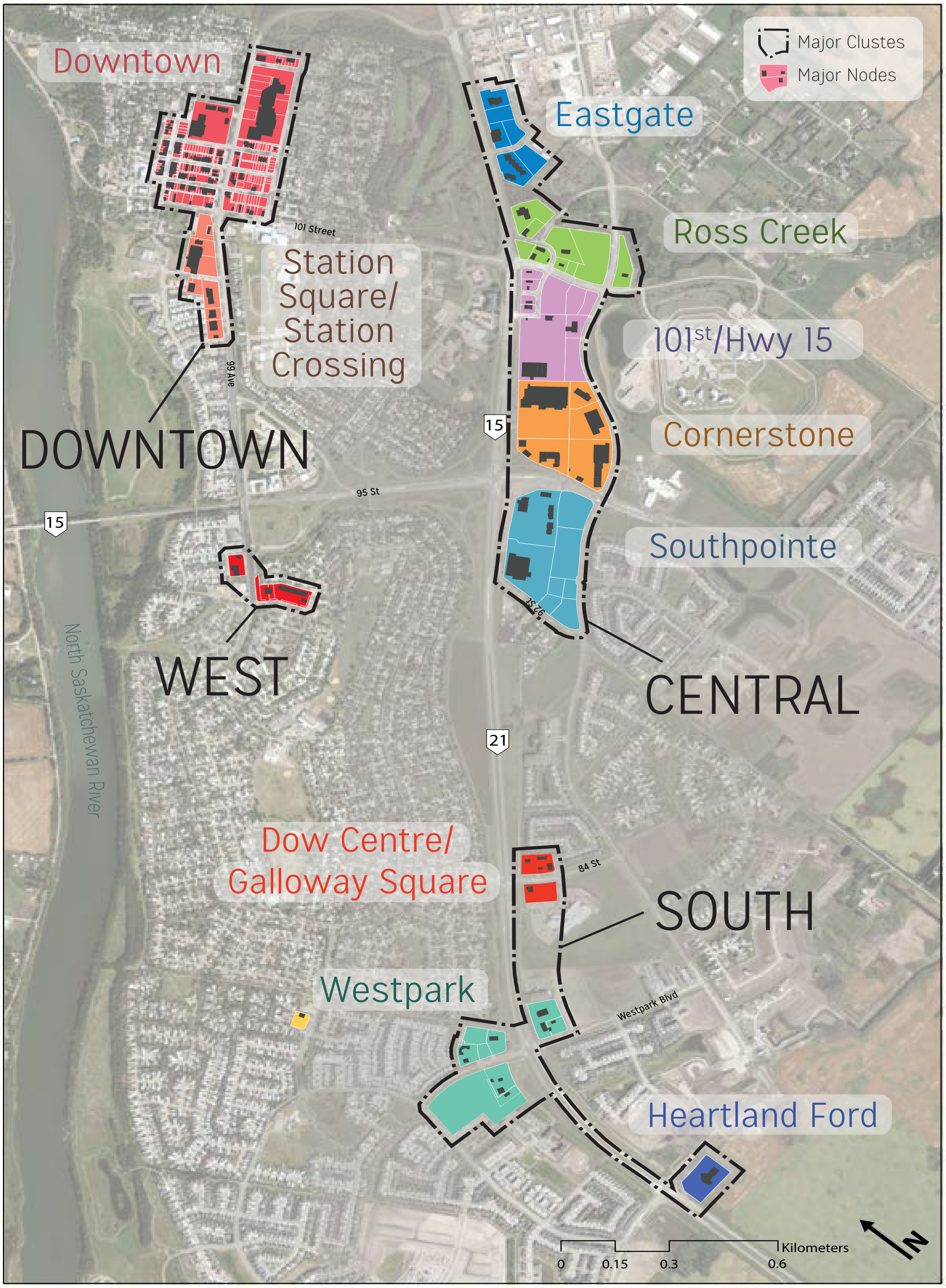
### CITY OF FORT SASKATCHEWAN RETAIL INVENTORY

(Source: City of Fort Saskatchewan & Cushing Terrell Architecture Inc.)

| Merchandise Category | Existing Inventory (SF) | Existing Inventory (%) | Number of Stores | % of Number of Stores | Average Store Size |
|---|---|---|---|---|---|
| Grocery & Specialty Foods | 181,075 | 15.16% | 16 | 5.6% | 11,317 |
| Alcohol & Tobacco | 28,529 | 2.39% | 14 | 4.9% | 2,038 |
| Pharmacy | 50,426 | 4.22% | 5 | 1.7% | 10,085 |
| Personal Services | 138,712 | 11.62% | 64 | 22.3% | 2,167 |
| Clothing & Apparel | 84,211 | 7.05% | 9 | 3.1% | 9,357 |
| Footwear | 4,741 | 0.40% | 2 | 0.7% | 2,370 |
| Jewelry & Accessories | 6,019 | 0.50% | 2 | 0.7% | 3,009 |
| Health & Beauty | 34,961 | 2.93% | 24 | 8.4% | 1,457 |
| Home Electronics & Appliances | 19,744 | 1.65% | 3 | 1.0% | 6,581 |
| Home Furnishings & Accessories | 38,301 | 3.21% | 5 | 1.7% | 7,660 |
| Home Improvement & Gardening | 120,919 | 10.13% | 4 | 1.4% | 30,230 |
| Books & Multi-Media | 2,403 | 0.20% | 1 | 0.3% | 2,403 |
| Sporting Goods & Outdoor Recreation | 22,781 | 1.91% | 2 | 0.7% | 11,390 |
| Toys & Hobbies | 13,936 | 1.17% | 2 | 0.7% | 6,968 |
| Specialty Retail | 83,700 | 7.01% | 33 | 11.5% | 2,536 |
| Full Service F&B | 76,645 | 6.42% | 23 | 8.0% | 3,332 |
| Limited Service F&B | 59,768 | 5.01% | 36 | 12.5% | 1,660 |
| Entertainment & Leisure | 63,119 | 5.29% | 9 | 3.1% | 7,013 |
| Auto Parts & Accessories | 65,798 | 5.51% | 10 | 3.5% | 6,580 |
| Auto/RV/Motorsports Dealership | 57,400 | 4.81% | 5 | 1.7% | 11,480 |
| VACANT | 40,861 | 3.42% | 18 | 6.3% | 2,270 |
| **TOTAL** | **1,194,049** | **100.00%** | **287** | **100%** | **4,160** |

Figure 4.3
## RETAIL NODES
(Source: Cushing Terrell Architecture Inc.)

| Identified Retail Node (Includes vacant retail spaces) | Total Inventory (sf) |
|---|---|
| CENTRAL | 654,329 |
| SOUTH | 110,763 |
| DOWNTOWN | 378,402 |
| WEST | 50,555 |
| **TOTAL** | **1,194,049** |



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# 3.4%

## CITY OF FORT SASKATCHEWAN'S RETAIL VACANCY

These are extremely beneficial steps in terms of creating a resilient and attractive retail market, for both residents and visitors. Retail developments that focus on the local culture and history help to form an identity of a place, which can make shopping a more memorable experience will need to find ways to enhance or redefine their spaces and positioning, realizing that certain tenants, particularly those with an established brand will likely target the newer developments in close proximity to new emerging residential hot spots, such as in the south/southeast areas of the City.

4.4

### CITYWIDE RETAIL INVENTORY

To document the retail inventory for the City of Fort Saskatchewan, Cushing Terrell conducted on-the-ground fieldwork in which every retail project and retail node was documented in terms of the retail store brand, merchandise category and estimated unit size.

For the 2016 update, new retailers within the community were included with floor space estimates, and any businesses closed were also factored in to the updated 2016 inventory count.

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

As documented in **Tables 4.1 and 4.2**, the City of Fort Saskatchewan has an estimated retail floorspace of approximately 1.19 million sq. ft. This retail floorspace is comprised of approximately 287 retail premises that range from Auto Dealerships to Restaurants and Personal Services such as Florists or Salons.

Table 4.2

### RETAIL INVENTORY BY CATEGORY & NODE

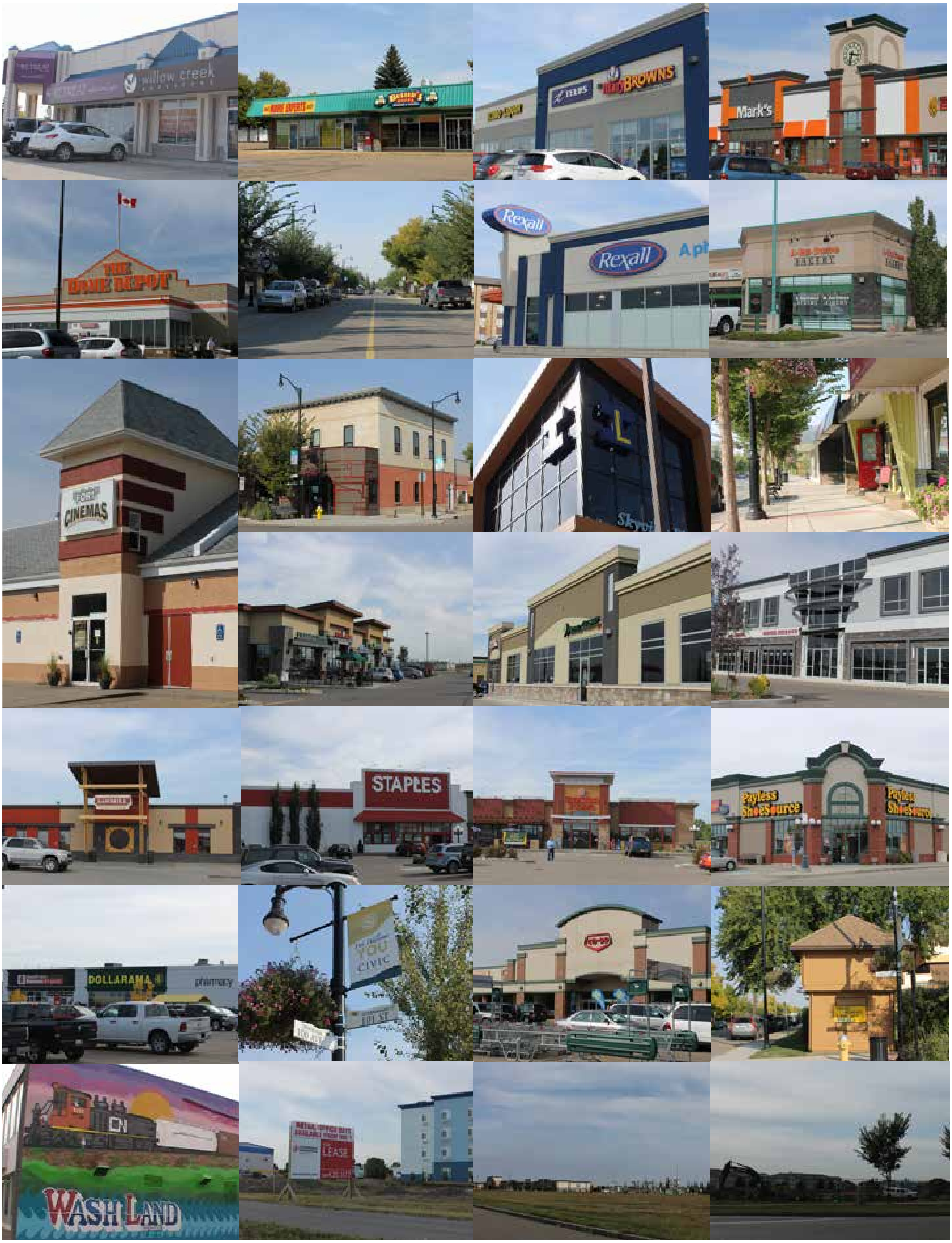
(Source: City of Fort Saskatchewan, Cushing Terrell Architecture Inc.)

| Merchandise Category | IDENTIFIED RETAIL NODE | | | | TOTAL (sf) |
|---|---|---|---|---|---|
| | CENTRAL | SOUTH | DOWNTOWN | WEST | |
| Grocery & Specialty Foods | 123,073 | 6,734 | 47,127 | 4,142 | **181,075** |
| Alcohol & Tobacco | 11,130 | 4,071 | 9,426 | 3,903 | **28,529** |
| Pharmacy | 23,495 | 25,732 | 0 | 1,200 | **50,426** |
| Personal Services | 32,406 | 7,961 | 91,052 | 7,293 | **138,712** |
| Clothing & Apparel | 61,552 | 0 | 22,659 | 0 | **84,211** |
| Footwear | 4,129 | 0 | 611 | 0 | **4,741** |
| Jewelry & Accessories | 2,000 | 0 | 4,019 | 0 | **6,019** |
| Health & Beauty | 7,168 | 3,376 | 20,365 | 4,051 | **34,961** |
| Home Electronics & Appliances | 15,455 | 0 | 4,289 | 0 | **19,744** |
| Home Furnishings & Accessories | 37,075 | 0 | 0 | 1,226 | **38,301** |
| Home Improvement & Gardening | 115,679 | 0 | 5,240 | 0 | **120,919** |
| Books & Multi-Media | 1,000 | 0 | 1,403 | 0 | **2,403** |
| Sporting Goods & Outdoor Recreation | 21,976 | 0 | 805 | 0 | **22,781** |
| Toys & Hobbies | 12,000 | 0 | 1,936 | 0 | **13,936** |
| Specialty Retail | 45,306 | 1,930 | 33,982 | 2,482 | **83,700** |
| Full Service F&B | 22,190 | 22,568 | 28,069 | 3,818 | **76,645** |
| Limited Service F&B | 31,944 | 12,753 | 10,642 | 4,429 | **59,768** |
| Entertainment & Leisure | 4,618 | 0 | 48,501 | 10,000 | **63,119** |
| Auto Parts & Accessories | 49,022 | 1,510 | 15,266 | 0 | **65,798** |
| Auto/RV/Motorsports Dealership | 31,243 | 24,129 | 2,028 | 0 | **57,400** |
| VACANT | 1,867 | 0 | 30,984 | 8,010 | **40,861** |
| **TOTAL** | **654,329** | **110,763** | **378,402** | **50,555** | **1,194,049** |

Figure 4.4

## REPRESENTATIVE CITY RETAIL IMAGERY

Source: Photos by Cushing Terrell Architecture Inc.)



4

# 232,000 sf

AMOUNT OF GROCERY/PHARMACY FLOORSPACE IN CITY

In this store count, those businesses that may be more office related (e.g. Professional Services such as lawyers, medical clinics, chiropractors, dentists etc), but nonetheless occupy ground level traditional retail frontage are noted, however the retail inventory does not account for these Professional Services, since they do not have typical "retail sales productivity" applicable to their business.

The inventory does however distinguish and therefore take into account Personal Services (e.g. Financial, Salons etc.) that do occupy traditional streetfront retail spaces.

A review of the Fort Saskatchewan's competitive retail environment provides a number of indicators as to potential merchandise and tenant opportunities.

The local market has reached a threshold whereby a number of other branded chains could have sufficient market support to warrant a location and in some cases second or multiple locations depending on the type of retailer, however there is currently a deficiency in the quality of retail space and configurations suitable for new market entries. One such example would be Shoppers Drug Mart whose typical model would require a population of approximately 10,000 to justify a store of 15,000 sq. ft. -18,000 sq. ft.

4.5

## RETAIL INVENTORY BY NODE

Based on fieldwork and inventory, Fort Saskatchewan's Retail environment was allocated into four nodes. Each node was determined based on geographic and spatial factors such as road networks, patterns of residential development or types of inventory.

The result were the following nodes totaling 1.19 million sq. ft:

- CENTRAL 654,300 sf
- DOWNTOWN 378,402 sf
- SOUTH 110,763 sf
- WEST 50,555 sf

The Central and South nodes comprise the majority of the comparison or destination types of shops and services, while the Downtown node has a large number of local and independent Specialty Retail and Limited Service Food & Beverage (F&B) businesses. The West node is comprised of Neighbourhood-serving shops and services.

**Table 4.2** provides a breakdown of the City's retail inventory by category and by node and reveals the strengths and weaknesses of each. It is worth noting however, that because a specific node may not have any retail space, this does not suggest that there is a void, but rather could be simply a reflection of the area being more local in its trade area. This is particularly the case for the West node, which provides the basic day-to-day needs for its local trade area residents.

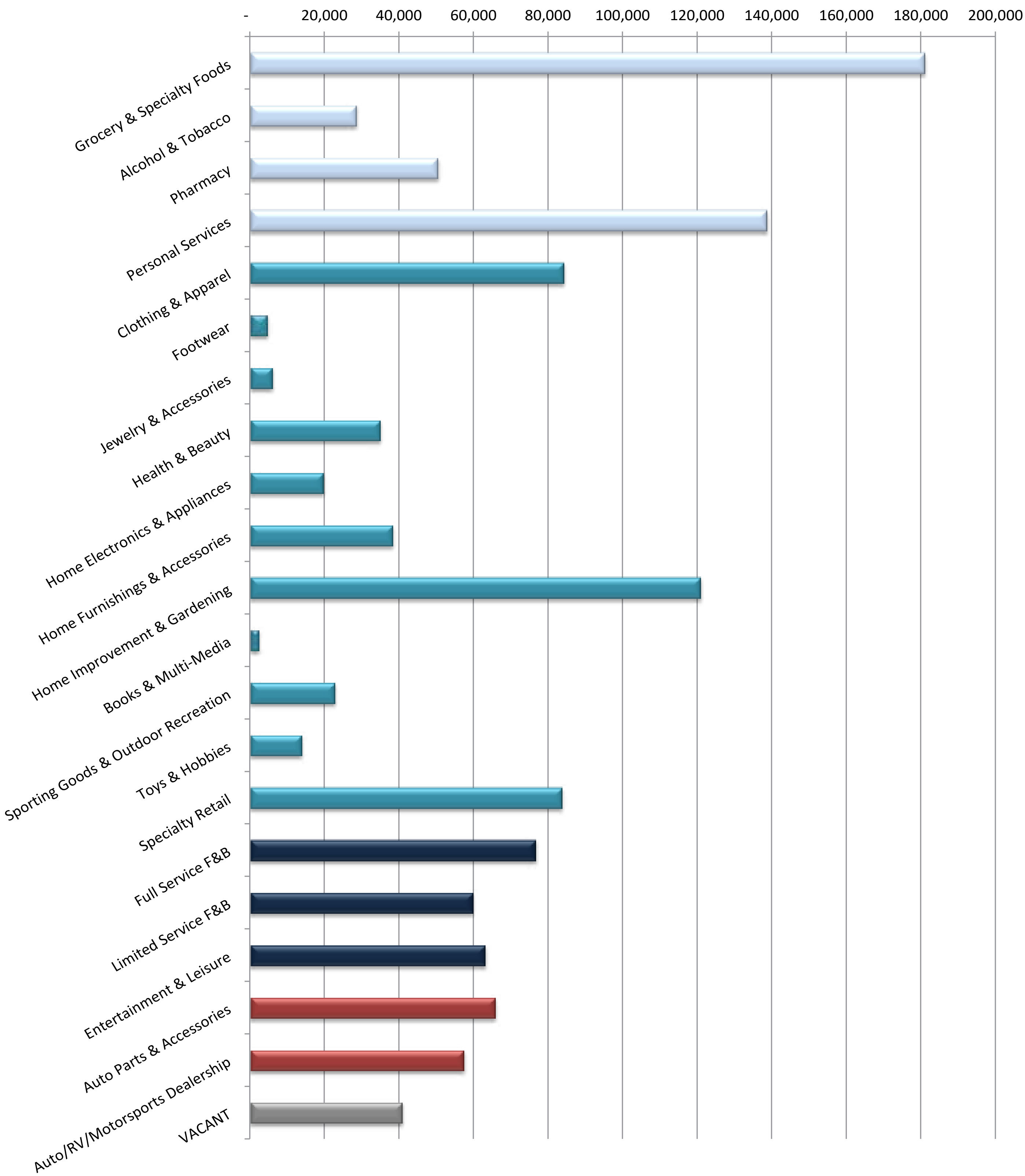
Conversely, the Central node has a wide array of all types of shops and services, though its largest share of retail category is Grocery & Specialty Foods with over 123,000 sq. ft. or 19% of the total Central node floorspace. This is further validation as to why Consumer Survey respondents see this area as their Primary Convenience node.

The Downtown node's largest retail category is Personal Services which currently accounts for 24% of the total Downtown floorspace. This high ratio is driven by the fact that the Downtown features smaller format, neighbourhood-serving retail with nearby residential.

Figure 4.5

## CITY OF FORT SASKATCHEWAN RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Cushing Terrell Architecture Inc.)



4

# 378,400

## AMOUNT OF SQUARE FOOTAGE IN DOWNTOWN

The South retail node has seen notable growth since the publishing of the original report in 2014. New developments include Shoppers Drug Mart, The Great Canadian Brewhouse and Wendy's in the WestPark Centre, which is continuing to grow. The progression of this development is consistent with the notion that retail tends to follow rooftops, meaning as more residential dwellings are constructed (the south is a core area of residential growth in the City), retail in the area will naturally become more established.

Relative to the amount of space in the South node, Auto/RV/Motorsports Dealerships represent approximately 22% of the South node floorspace, as a result of the Heartland Ford relocation. Being located on the heavily-trafficked southern entrance to the City creates a highly desirable location for these uses.

4.6
### RETAIL INVENTORY BY CATEGORY

Categories of retail were also incorporated into the overall inventory list as shown in **Figures 4.5 & 4.6**.

Table 4.3
### RETAIL INVENTORY SUMMARY BY NODE & CLASS

(Source: City of Fort Saskatchewan, Cushing Terrell Architecture Inc)

| Identified Retail Node (Includes vacant retail spaces) | Total Inventory (sf) | Inventory Class A (sf) | Inventory Class B (sf) | Inventory Class C (sf) |
|---|---|---|---|---|
| CENTRAL | 654,329 | 191,378 | 415,186 | 47,765 |
| SOUTH | 110,763 | 54,124 | 23,693 | 32,947 |
| DOWNTOWN | 378,402 | 18,269 | 102,114 | 258,019 |
| WEST | 50,555 | 955 | 15,957 | 33,643 |
| **TOTAL** | **1,194,049** | **264,725** | **556,949** | **372,374** |

The current vacancy in the Downtown node accurately gauges the ongoing revitalization, as most of this vacant space (30,984 sq. ft.) is located in the Market Square or Fort Mall centres which are currently being redeveloped. Other than these projects, the Downtown has a relatively strong rate of occupancy.

This is important to note since future growth in the City will continue to put pressure on the Downtown over time. But if the Downtown continues to ensure its positioning and vibrancy, it too can maintain a viable alternative to the more expensive, higher rent locations in the City.

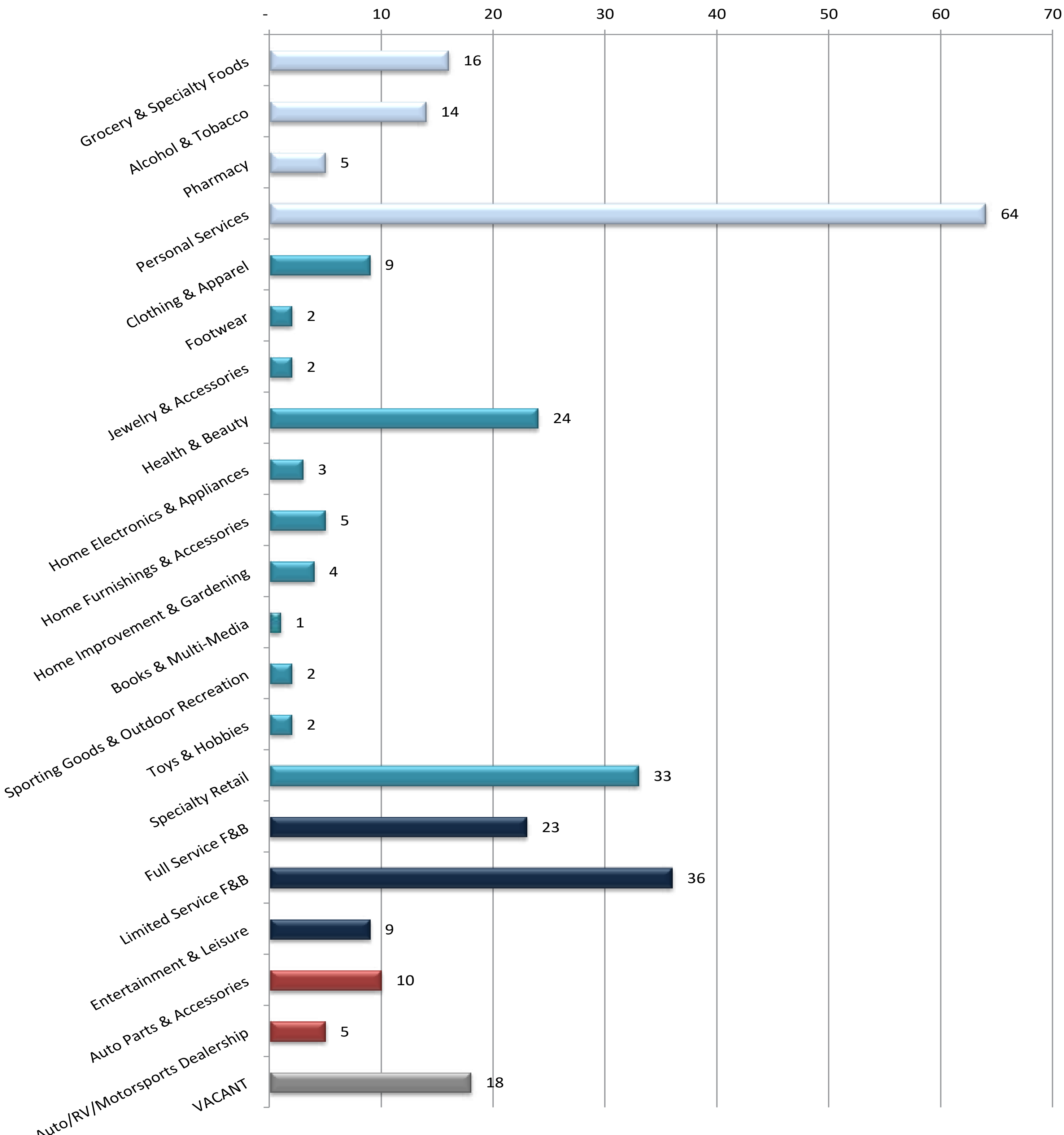
Designating retail categories to the overall inventory makes it possible to conduct a category void analysis for Fort Saskatchewan.

Categories were designated to correspond directly with the categories of retail utilized in the household expenditure data, thereby allowing for retail inflow and outflow calculations to correlate.

Figure 4.6

## CITY OF FORT SASKATCHEWAN RETAIL INVENTORY BY CATEGORY & NUMBER OF STORES

(Source: Cushing Terrell Architecture Inc. 2014)



# 4

On a citywide basis, the Top 5 retail categories in terms of overall retail floorspace include:

1. *Grocery & Specialty Foods* *181,100 sf*
2. *Personal Services* *138,700 sf*
3. *Home Improvement* *121,000 sf*
4. *Specialty Retail* *83,700 sf*
5. *Clothing and Apparel* *84,200 sf*

Newer developments/redevelopments such as those identified in **Figure 4.2** (e.g. Cornerstone/ Southpointe, Westpark) have the potential to create a better foundation for success for both local and branded tenants. Location will always be one of the most critical determinants, particularly for a comparison retailer for whom patronage is required from beyond a localized trade area. It will be challenging for Fort Saskatchewan to compete for Comparison retailers, given the development of both Emerald Hills and Manning Town Centre, which have the locational benefit of being able to intercept consumer traffic.

The majority of categories which show a low level of inventory include Jewelry & Accessories (6,000 sq. ft. in 4 stores), Footwear (4,740 sq. ft. in 2 stores) and Books & Media (2,400 sq. ft. in 1 store). Together these three categories make up only 1.1% of Fort Saskatchewan's total retail inventory. Each of these categories may be considered under-served, however they are more conducive to Fort Saskatchewan's market profile, when considering the demographics and typical store size formats.

However, industry-wide the Book industry continues to struggle in the face of on-line competition by vendors such as Amazon. Nonetheless, a store such as Indigo/Chapters, which is undergoing a transformational shift to become a "cultural department store" could represent a potential addition to the City's retail inventory, though again it would likely be challenging when considering Fort Saskatchewan's external competitive forces.

4.7
## RETAIL INVENTORY BY CLASS

As previously shown through a retail inventory category analysis and location analysis, the Fort Saskatchewan retail market would seem to be largely in balance.

Although Fort Saskatchewan's retail landscape and inventory is dominated by the Central and Downtown nodes, the South node is increasingly becoming a strong node, partly due to the location which places this node in the strongest location to tap into new residential development in the city. This will have implications on other nodes as the City grows. In particular, the Downtown will face pressures for tenant attraction and retention.

The analysis shown in **Table 4.3** is a valuable tool to shed light on opportunities associated with categories of retail which either may be relying on Fort Saskatchewan's older infrastructure or may be looking to relocate to more modern spaces in the coming years.

The categorization of class is based on a subjective evaluation criteria such as the age of the building (e.g. older than 5 yrs), locational attributes (e.g. parking, access, visibility) and whether the tenant is a chain store or local (refer to notation beside **Figure 4.7**).

Beartooth Harley Davidson, Montana | designed by Cushing Terrell

4

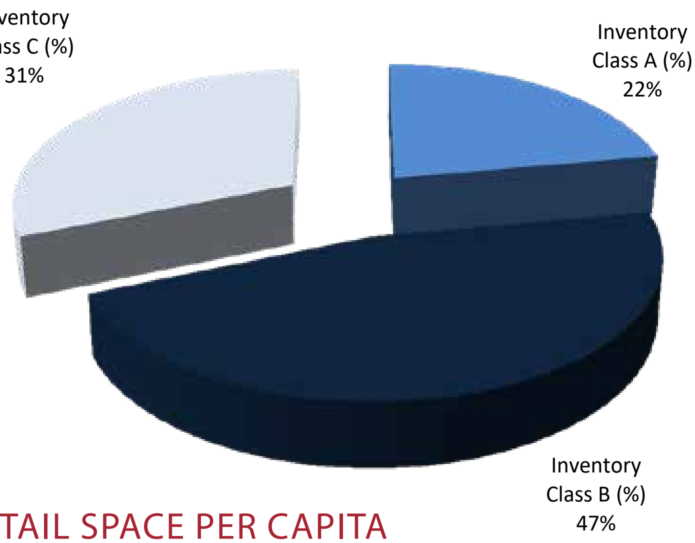
# 48.6 sf

## RATIO OF TOTAL RETAIL FLOORSPACE PER CAPITA IN CITY

Figure 4.7

### CITY OF FORT SASKATCHEWAN RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: Cushing Terrell Architecture Inc. 2014)




*Note: The allocations as Class A, B or C is a subjective assessment based on the following attributes:*

**Class A** *is considered to be a newer retail space occupying a high profile location with strong traffic counts, access and egress.*

**Class B** *is considered to be older retail space that may have been recently renovated, but still benefits from adequate visibility, traffic counts as well as access and egress.*

**Class C** *is considered to be outdated or obsolete retail space located in low traffic areas, with resulting lower customer patronage rates.*

The role of the classification is to provide a sensitized figure against which sales productivities could be forecast. For example, a clothing store in Downtown Fort Saskatchewan is likely to have a lower sales productivity than a clothing store in the Cornerstone Centre. Such differences need to be taken into account when estimating retail sales and resulting demand.

As displayed in **Figure 4.7**, the caliber of retail in Fort Saskatchewan can best be classified as average in that the majority of retail spaces fall within the B Class quality (47%).

A Class accounts for 22%, but is expected to increase while C Class comprises 31% of the total retail space.

With the number of new developments either under construction or proposed in the City, the amount of A Class space is expected to increase. An increase in higher quality retail spaces will create notable opportunities for exposing the Fort Saskatchewan brand and opportunity to new-to-market retailers as well as those tenants wishing to relocate or add additional locations.

4.8

### RETAIL SPACE PER CAPITA

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

In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita (meaning not just organized shopping centres, but streetfront and small scale freestanding or neighbourhood retail) is in the range of 30 sq. ft. to 40 sq. ft. (Source: International Council of Shopping Centers).

For most markets that fall within the 30 to 40 sq. ft. per capita range, they are typically self-serving markets, meaning they do not have a significant regional trade area, but rather fulfill the demand and needs of its own City's population base.

When applying the retail inventory for the City of Fort Saskatchewan against the City's population, the resulting per capita ratio is 48.6, which suggests the City could be slightly over-retailed.


826

This figure does not though take into account the quality of the retail space and thus it should be acknowledged that older obsolete space can sometimes skew this figure. Regardless, it does provide a general indication.

Per capita space ratio can be further used as a guide when forecasting future demand for the City.

## 4.9 SUMMARY & IMPLICATIONS

The resulting inventory for the City of Fort Saskatchewan illustrates a community oriented retail offering that provides essential shops and services for residents of Fort Saskatchewan as well as populations within an approximate 15 - 20 minute drive, primarily north, northwest and east of the City.

Overall, the City's inventory has grown substantially over the past few years to a point now whereby the city should exercise caution so as to not be over-retailed in categories that could negatively impact areas such as Downtown.

The City has an estimated retail inventory of almost 1.19 million sq. ft. and a vacancy of less than 4% which suggests a healthy retail environment.

The city sits at a point where the retail market in terms of inventory and vacancies as well as downtown viability are relatively balanced and in good stead.

The analysis of the city's retail inventory reveals strength in convenience retail categories.

The biggest threat to Fort Saskatchewan's retail outlook will come from the newer developing projects at Emerald Hills and Manning Town Centre.

Rather than trying to compete with those larger projects, the City of Fort Saskatchewan has the opportunity to target specific categories and tenants that can maintain the city's balance while at the same time capitalizing on voids in the market.


DADD EO'S

# 5 RETAIL DEMAND & GAP ANALYSIS

## 5.1 INTRODUCTION

The following section will quantify the amount of supportable floorspace in the City of Fort Saskatchewan as justified by the Trade Area it serves. After determining the supportable and residual floorspace (if and as determined), the retail gap analysis will measure the difference between the supply and demand as presented in terms of inflow or outflow of retail sales.

## 5.2 RETAIL FLOORSPACE DEMAND BY TRADE AREA SEGMENT

**Tables 5.1 through 5.8** depict the Retail Floorspace demand estimates that are estimated to come from Fort Saskatchewan's respective Retail Trade Area's. This measure of retail demand is used to further rationalize the current amount of inventory in the City and further highlight where particular areas of deficiency or opportunity may lie as it relates to the overall retail offering in the City.

By dividing the aggregate Trade Area retail spending potential by category-specific retail sales productivity estimates (measured in $ per sq. ft.), a metric commonly used by the retail industry to quantify sales performance, the estimated warranted floorspace can be calculated.

Once the estimated expenditure for each Trade Area is calculated, an estimated market share is applied to each category. This reflects an estimate on how much retail sales the City of Fort Saskatchewan could reasonably be expected to garner from each respective Trade Area.

Market Share estimates are derived in part from the results of the Consumer Intercept Survey which asked respondents what percentage of their retail spending on a specific category was "inside Fort Saskatchewan" or "outside Fort Saskatchewan.

This resulting new expenditure then has a category-specific sales productivity applied which results in an estimated floorspace demand figure attributable to each Trade Area segment.

***City of Fort Saskatchewan Supply - Demand***

Starting with **Table 5.1**, the City of Fort Saskatchewan as a stand-alone market is quantified to determine, based on expenditure and market shares, just how much retail space the City's 24,500 residents could reasonably justify, not taking into account inflow of any kind.

Accordingly, **Table 5.1** reveals that the City's residents could justify approximately just over 556,000 sq. ft. of retail space, at an overall retained market share of 60%.

Since this study is examining the City of Fort Saskatchewan's retail market, the resulting market shares and demand are viewed as "retained" in that 60% of total City of Fort Saskatchewan resident spending is retained in the City of Fort Saskatchewan. The remaining 40% is considered outflow and spent elsewhere in Sherwood Park, Strathcona County, or the City of Edmonton.

The resulting figures in **Table 5.1** depict a market that retains strong market share for conveniences and neccessity goods, but much of the DSTM or Comparison Goods purchases are made outside of Fort Saskatchewan.

TABLE 5.1

## CITY OF FORT SASKATCHEWAN RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2016 (Year End Est.) | | | |
|---|---|---|---|---|
| | City of Fort Saskatchewan Retail Sales Productivity ($psf) | Fort SaskatchewanRetained Market Share | Retained Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $510 | 85% | $65,207,029 | 127,857 |
| Pharmacy | $540 | 85% | $6,669,716 | 12,351 |
| Alcohol & Tobacco | $450 | 85% | $15,498,921 | 34,442 |
| Personal Services | $280 | 85% | $13,490,835 | 48,182 |
| Clothing & Apparel | $235 | 40% | $10,387,301 | 44,201 |
| Footwear | $245 | 40% | $3,097,441 | 12,643 |
| Jewelry & Accessories | $570 | 40% | $1,818,715 | 3,191 |
| Health & Beauty | $400 | 65% | $4,801,783 | 12,004 |
| Home Furnishings & Accessories | $215 | 30% | $6,142,382 | 28,569 |
| Home Electronics & Appliances | $575 | 35% | $10,676,982 | 18,569 |
| Home Improvement & Gardening | $270 | 65% | $5,307,554 | 19,658 |
| Books & Multimedia | $315 | 30% | $1,611,532 | 5,116 |
| Sporting Goods & Recreation | $205 | 35% | $1,479,815 | 7,219 |
| Toys & Hobbies | $205 | 35% | $1,269,819 | 6,194 |
| Miscellaneous Specialty | $195 | 45% | $4,834,595 | 24,793 |
| Full-Service F&B | $325 | 65% | $7,402,058 | 22,776 |
| Limited Service F&B | $580 | 75% | $7,883,849 | 13,593 |
| Entertainment & Leisure | $180 | 40% | $5,707,390 | 31,708 |
| Auto Parts & Accessories | $335 | 65% | $3,948,674 | 11,787 |
| Auto/RV/Motorsports Dealership | $405 | 55% | $29,750,991 | 73,459 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$371** | **60%** | **$206,987,382** | **558,310** |

TABLE 5.2

## PART-TIME FORT SASKATCHEWAN RESIDENT RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2016 (Year End Est.) | | | |
|---|---|---|---|---|
| | Temp Residents Retail Sales Productivity ($psf) | Temp Residents Inflow Market Share | Inflow Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $510 | 36.5% | $1,367,610 | 2,682 |
| Pharmacy | $540 | 36.5% | $139,886 | 259 |
| Alcohol & Tobacco | $450 | 45.0% | $400,764 | 891 |
| Personal Services | $280 | 75.5% | $585,276 | 2,090 |
| Clothing & Apparel | $235 | 18.0% | $228,302 | 971 |
| Footwear | $245 | 6.0% | $22,693 | 93 |
| Jewelry & Accessories | $570 | 6.0% | $13,324 | 23 |
| Health & Beauty | $400 | 6.0% | $21,649 | 54 |
| Home Furnishings & Accessories | $215 | 1.5% | $15,000 | 70 |
| Home Electronics & Appliances | $575 | 9.5% | $141,546 | 246 |
| Home Improvement & Gardening | $270 | 7.5% | $29,911 | 111 |
| Books & Multimedia | $315 | 6.0% | $15,742 | 50 |
| Sporting Goods & Recreation | $205 | 6.0% | $12,390 | 60 |
| Toys & Hobbies | $205 | 6.0% | $10,632 | 52 |
| Miscellaneous Specialty | $195 | 8.5% | $44,603 | 229 |
| Full-Service F&B | $325 | 45.0% | $250,291 | 770 |
| Limited Service F&B | $580 | 43.0% | $220,770 | 381 |
| Entertainment & Leisure | $180 | 11.5% | $80,144 | 445 |
| Auto Parts & Accessories | $335 | 28.5% | $84,562 | 252 |
| Auto/RV/Motorsports Dealership | $450 | 0.0% | $0 | 0 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$379** | **22%** | **$3,685,095** | **9,729** |

TABLE 5.3

## PTA (INCLUDING CITY) RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2016 (Year End Est.) PTA Incl Fort Sask Retail Sales Productivity ($psf) | PTA Inflow & Retained Market Share | Inflow & Retained Sales $ | Floorspace Demand (sf) |
|---|---|---|---|---|
| Grocery & Specialty Foods | $510 | 85% | $70,614,090 | 138,459 |
| Pharmacy | $540 | 85% | $7,308,819 | 13,535 |
| Alcohol & Tobacco | $450 | 85% | $16,771,245 | 37,269 |
| Personal Services | $280 | 85% | $14,600,443 | 52,144 |
| Clothing & Apparel | $235 | 40% | $11,221,249 | 47,750 |
| Footwear | $245 | 40% | $3,336,821 | 13,620 |
| Jewelry & Accessories | $570 | 40% | $1,954,480 | 3,429 |
| Health & Beauty | $400 | 65% | $5,172,012 | 12,930 |
| Home Furnishings & Accessories | $215 | 30% | $6,573,364 | 30,574 |
| Home Electronics & Appliances | $575 | 35% | $11,521,830 | 20,038 |
| Home Improvement & Gardening | $270 | 65% | $5,819,355 | 21,553 |
| Books & Multimedia | $315 | 30% | $1,742,114 | 5,531 |
| Sporting Goods & Recreation | $205 | 35% | $1,596,340 | 7,787 |
| Toys & Hobbies | $205 | 35% | $1,365,943 | 6,663 |
| Miscellaneous Specialty | $195 | 45% | $5,204,581 | 26,690 |
| Full-Service F&B | $325 | 65% | $7,992,041 | 24,591 |
| Limited Service F&B | $580 | 75% | $8,512,233 | 14,676 |
| Entertainment & Leisure | $180 | 40% | $6,135,043 | 34,084 |
| Auto Parts & Accessories | $335 | 65% | $4,362,938 | 13,024 |
| Auto/RV/Motorsports Dealership | $450 | 55% | $32,683,043 | 72,629 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$376** | **60%** | **$224,487,984** | **596,976** |

TABLE 5.4

## STA WEST RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2016 (Year End Est.) STA West Retail Sales Productivity ($psf) | STA West Inflow Market Share | Inflow Sales $ | Floorspace Demand (sf) |
|---|---|---|---|---|
| Grocery & Specialty Foods | $510 | 25% | $6,710,267 | 13,157 |
| Pharmacy | $540 | 25% | $867,646 | 1,607 |
| Alcohol & Tobacco | $450 | 25% | $1,626,540 | 3,615 |
| Personal Services | $280 | 25% | $1,275,069 | 4,554 |
| Clothing & Apparel | $235 | 10% | $799,085 | 3,400 |
| Footwear | $245 | 10% | $244,296 | 997 |
| Jewelry & Accessories | $570 | 10% | $127,349 | 223 |
| Health & Beauty | $400 | 20% | $473,462 | 1,184 |
| Home Furnishings & Accessories | $215 | 5% | $274,085 | 1,275 |
| Home Electronics & Appliances | $575 | 10% | $972,772 | 1,692 |
| Home Improvement & Gardening | $270 | 50% | $1,725,835 | 6,392 |
| Books & Multimedia | $315 | 5% | $87,316 | 277 |
| Sporting Goods & Recreation | $205 | 10% | $143,426 | 700 |
| Toys & Hobbies | $205 | 25% | $293,944 | 1,434 |
| Miscellaneous Specialty | $195 | 10% | $373,222 | 1,914 |
| Full-Service F&B | $325 | 20% | $712,702 | 2,193 |
| Limited Service F&B | $580 | 10% | $328,939 | 567 |
| Entertainment & Leisure | $180 | 10% | $465,266 | 2,585 |
| Auto Parts & Accessories | $335 | 20% | $591,985 | 1,767 |
| Auto/RV/Motorsports Dealership | $450 | 15% | $3,000,589 | 6,668 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$375** | **18%** | **$21,093,795** | **56,200** |

TABLE 5.5

## STA EAST RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2016 (Year End Est.) | | | |
|---|---|---|---|---|
| | STA East Retail Sales Productivity ($psf) | STA East Inflow Market Share | Inflow Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $510 | 80% | $12,621,249 | 24,748 |
| Pharmacy | $540 | 80% | $1,730,765 | 3,205 |
| Alcohol & Tobacco | $450 | 80% | $3,326,722 | 7,393 |
| Personal Services | $280 | 80% | $2,338,127 | 8,350 |
| Clothing & Apparel | $235 | 20% | $891,474 | 3,794 |
| Footwear | $245 | 20% | $306,580 | 1,251 |
| Jewelry & Accessories | $570 | 20% | $139,157 | 244 |
| Health & Beauty | $400 | 50% | $729,306 | 1,823 |
| Home Furnishings & Accessories | $215 | 10% | $319,626 | 1,487 |
| Home Electronics & Appliances | $575 | 20% | $1,166,527 | 2,029 |
| Home Improvement & Gardening | $270 | 75% | $1,539,696 | 5,703 |
| Books & Multimedia | $315 | 5% | $53,090 | 169 |
| Sporting Goods & Recreation | $205 | 25% | $194,331 | 948 |
| Toys & Hobbies | $205 | 50% | $397,721 | 1,940 |
| Miscellaneous Specialty | $195 | 25% | $608,812 | 3,122 |
| Full-Service F&B | $325 | 30% | $599,810 | 1,846 |
| Limited Service F&B | $580 | 25% | $461,392 | 796 |
| Entertainment & Leisure | $180 | 20% | $445,012 | 2,472 |
| Auto Parts & Accessories | $335 | 45% | $733,836 | 2,191 |
| Auto/RV/Motorsports Dealership | $450 | 30% | $3,370,752 | 7,491 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$395** | **47%** | **$31,973,986** | **80,999** |

TABLE 5.6

## TOTAL TRADE AREA RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2016 (Year End Est.) | | |
|---|---|---|---|
| | Total Floorspace Demand (sf) | Current City Retail Inventory (sf) | Total Residual Demand (sf) |
| Grocery & Specialty Foods | 176,364 | 181,075 | -4,711 |
| Pharmacy | 18,347 | 28,529 | -10,183 |
| Alcohol & Tobacco | 48,277 | 50,426 | -2,150 |
| Personal Services | 65,049 | 138,712 | -73,663 |
| Clothing & Apparel | 54,944 | 84,211 | -29,267 |
| Footwear | 15,868 | 4,741 | 11,128 |
| Jewelry & Accessories | 3,896 | 6,019 | -2,122 |
| Health & Beauty | 15,937 | 34,961 | -19,024 |
| Home Furnishings & Accessories | 33,335 | 19,744 | 13,591 |
| Home Electronics & Appliances | 23,758 | 38,301 | -14,543 |
| Home Improvement & Gardening | 33,648 | 120,919 | -87,271 |
| Books & Multimedia | 5,976 | 2,403 | 3,574 |
| Sporting Goods & Recreation | 9,435 | 22,781 | -13,346 |
| Toys & Hobbies | 10,037 | 13,936 | -3,899 |
| Miscellaneous Specialty | 31,726 | 83,700 | -51,974 |
| Full-Service F&B | 28,629 | 76,645 | -48,016 |
| Limited Service F&B | 16,039 | 59,768 | -43,729 |
| Entertainment & Leisure | 39,141 | 63,119 | -23,978 |
| Auto Parts & Accessories | 16,981 | 65,798 | -48,817 |
| Auto/RV/Motorsports Dealership | 86,788 | 57,400 | 29,388 |
| **TOTAL RETAIL CATEGORIES ONLY** | **734,175** | **1,153,187** | **-419,012** |

5

Much of this decision is based on the relative proximity of Edmonton and its major metropolitan shopping areas in relation to the City of Fort Saskatchewan. This trend will become even more evident as Emerald Hills and Manning Town Centre continue to provide larger format Comparison retail, within a 25-minute drive time of the City of Fort Saskatchewan.

***Part-Time Resident Supply - Demand***

As profiled in the Demographic Section, the estimated 1,200 part time or temporary residents in the City of Fort Saskatchewan can be treated as residents during the time in which they reside at hotels in Fort Saskatchewan.

Accordingly, and based on a 22% overall market share of their total spending, **Table 5.2** reveals that part time residents could justify demand for approximately 10,000 sq. ft. Much of this demand is warranted for categories such as Grocery, Pharmacy, Personal Services, and Food & Beverage (Full and Limited Service formats).

***Total Primary Trade Area (Including City of Fort Saskatchewan) Supply - Demand***

**Table 5.3** illustrates the combined demand resulting from the Total Primary Trade Area, which includes the City of Fort Saskatchewan, part-time residents and other neighbouring residents as delineated in the Trade Area. The figures reveal demand for approximately 600,000 sq. ft. of retail at a combined market share of approximately 60%.

To account for spending inflow originating outside of the City of Fort Saskatchewan, Cushing Terrell also quantified the Secondary Trade Areas.

Accordingly, each of these additional inflow areas and their resulting spending and market shares have been estimated to document the amount of floorspace attributable to each.

***Secondary Trade Area West Supply - Demand***

Each of the Secondary Trade Areas is much less populated than the Primary Trade Area, and as such the amount of demand attributable is lower.

For these Secondary Trade Areas, demand is in the form of Convenience and more lower-order Comparison or Department Store Type Merchandise such as everyday Fashion, Automobiles, or Leisure such as Sporting Goods and Toys.

**Table 5.4** reveals the demand for floorspace in the City of Fort Saskatchewan attributable to residents in the STA West at approximately 56,000 sq. ft. at a market share of 18%.

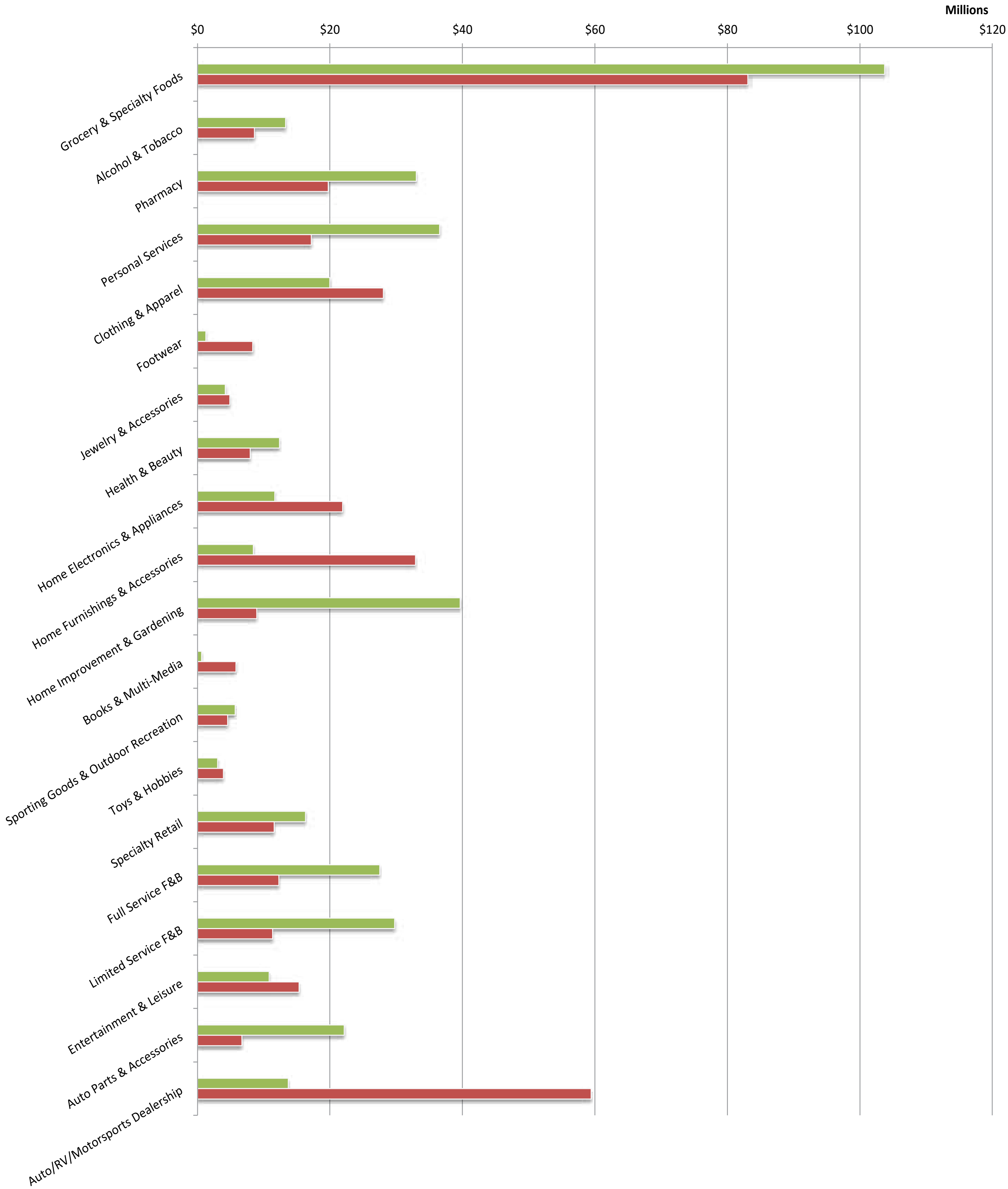
***Secondary Trade Area East Supply - Demand***

**Table 5.5** reveals the demand for floorspace in the City of Fort Saskatchewan attributable to residents in the STA East at approximately 81,000 sq. ft. at a market share of 47%.

The STA East is seen to be the area with a higher market share than the STA West because much of the consumer base from the STA East will have to pass through the City of Fort Saskatchewan and thus can be intercepted or more conveniently accommodated by the City's shops and services.

FIGURE 5.1

## CITY OF FORT SASKATCHEWAN RETAIL SPENDING SUPPLY AND DEMAND



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*Total Trade Area Supply - Demand*

**Table 5.6** aggregates the total demand for floorspace in the City of Fort Saskatchewan attributable to residents of the Primary and Secondary Trade Areas at approximately 735,000 sq. ft.

When compared against the current city's occupied retail inventory or supply at 1.15 million sq. ft., the difference between demand and supply equates to almost 420,000 sq. ft. of retail space. In other words, the City has 420,000 sq. ft. more retail space than current demand warrants.

If one factors into the equation forecasted population growth in the total trade area of approximately 7,300 over the next decade to 2026 (the majority of which will be in the City of Fort Saskatchewan), then estimated future floorspace demand could grow by approximately 185,000 to 220,000 sf (if applying per capita ratios of 25 to 30 sf per capita).

This estimate is based on growth in retail spending from 2016 levels at 2.5% per annum and further assumes an overall market share of **total** spending at 60% (current overall **total** market share is 49.7%) and a retail sales productivity of approximately $378 per sq. ft.

When factoring future growth against the current negative residual demand, the forecasts suggests the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that exhibit strong retail sales inflow potential. Examples include Grocery, Pharmacy, and Food & Beverage.

## 5.3 RETAIL GAP ANALYSIS QUANTIFICATION

The previous analysis quantified the supply vs. demand in terms of retail floorspace only. This next step involves quantifying the supply vs. demand in terms of retail sales performance and spending.

The process for calculating the retail surplus/ inflow involved estimating the current annual retail sales for each respective merchandise category in the City of Fort Saskatchewan.

This estimated annual retail sales value was calculated by applying a retail sales productivity (using industry baseline averages as determined by the International Council of Shopping Centers) against the inventory and further sensitized by the classification of the retail store (refer to the detailed Retail Inventory in **Appendix A**).

**Table 5.7 and Figure 5.1** illustrate the Retail Gap Analysis on a category-by-category basis for the City of Fort Saskatchewan.

Given the rate of market shares, it is not surprising that Fort Saskatchewan exhibits a high degree of retail sales leakage (outflow) of spending dollars.



CITY OF FORT SASKATCHEWAN

TABLE 5.7

## RETAIL INFLOW / OUTFLOW ESTIMATES

| Merchandise Category | Est. Current Annual Sales by Category (SUPPLY) | Est. Fort Saskatchewan Expenditure Potential 2016 (DEMAND) | Fort Saskatchewan Outflow / Inflow Estimates | Fort Saskatchewan Outflow / Inflow Factor |
|---|---|---|---|---|
| Grocery & Specialty Foods | $103,721,599 | $83,075,400.19 | $20,646,199 | 11.1 |
| Alcohol & Tobacco | $13,295,001 | $8,598,610.50 | $4,696,390 | 21.5 |
| Pharmacy | $33,026,130 | $19,730,876.78 | $13,295,253 | 25.2 |
| Personal Services | $36,557,464 | $17,176,991.82 | $19,380,472 | 36.1 |
| Clothing & Apparel | $19,984,681 | $28,053,121.71 | -$8,068,440 | -16.8 |
| Footwear | $1,261,648 | $8,342,051.39 | -$7,080,403 | -73.7 |
| Jewelry & Accessories | $4,206,539 | $4,886,199.12 | -$679,660 | -7.5 |
| Health & Beauty | $12,372,834 | $7,956,941.75 | $4,415,892 | 21.7 |
| Home Electronics & Appliances | $11,670,047 | $21,911,213.72 | -$10,241,167 | -30.5 |
| Home Furnishings & Accessories | $8,440,049 | $32,919,514.36 | -$24,479,466 | -59.2 |
| Home Improvement & Gardening | $39,643,018 | $8,952,854.28 | $30,690,163 | 63.2 |
| Books & Multi-Media | $615,563 | $5,807,047.96 | -$5,191,485 | -80.8 |
| Sporting Goods & Outdoor Recreation | $5,686,751 | $4,560,971.33 | $1,125,780 | 11.0 |
| Toys & Hobbies | $3,026,751 | $3,902,693.63 | -$875,943 | -12.6 |
| Specialty Retail | $16,317,761 | $11,565,735.92 | $4,752,025 | 17.0 |
| Full Service F&B | $27,515,773 | $12,295,447.98 | $15,220,325 | 38.2 |
| Limited Service F&B | $29,769,081 | $11,349,644.29 | $18,419,437 | 44.8 |
| Entertainment & Leisure | $10,819,683 | $15,337,606.44 | -$4,517,924 | -17.3 |
| Auto Parts & Accessories | $22,155,109 | $6,712,212.77 | $15,442,897 | 53.5 |
| Auto/RV/Motorsports Dealership | $13,700,677 | $59,423,714.18 | -$45,723,037 | -62.5 |
| VACANT | | | | |
| **TOTAL** | **$413,786,157** | **$372,558,850** | **$41,227,307** | **5.2** |

5.4
## RETAIL INFLOW & OUTFLOW

Cushing Terrell utilized a methodology of comparing Supply and Demand as generated by the Retail Spending patterns of the Trade Area Residents. This comparison of Supply and Demand results in a measure of Inflow or Outflow.

Inflow/Outflow conveniently measures the balance between the volume of supply (retail sales) generated by retail in Fort Saskatchewan and the demand (spending by households) within the same area.

Inflow (sometimes referred to as Surplus) in an area represents a condition whereby the supply exceeds the areas demand and where retailers are attracting shoppers that reside outside the normal or Primary Trade Area.

Outflow (sometimes referred to as Leakage) in an area represents a condition whereby a market's supply is less than the demand. In other words, retailers outside the market area are fulfilling the demand for retail products and thus demand is outflowing or leaking out of the normal or Primary Trade Area.

**Table 5.7** reveals a pattern of spending that again clearly substantiates the idea that the City of Fort Saskatchewan has a more localized Retail Trade Area with commensurate sales outflow.

In fact, it is common for many markets, particularly those closer to major metropolitan areas to have many areas where sales outflow occurs.

The Inflow/Outflow factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total inflow) to -100 (total outflow). A positive value represents inflow of retail opportunity where customers are drawn in from outside the trade area. A negative value represents outflow of retail sales, a market where customers are drawn outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales.

In the case of Fort Saskatchewan, **Table 5.7** reveals a pattern in which more day-to-day types of categories are generating inflow and surplus sales and could thus be targeted by retailers.

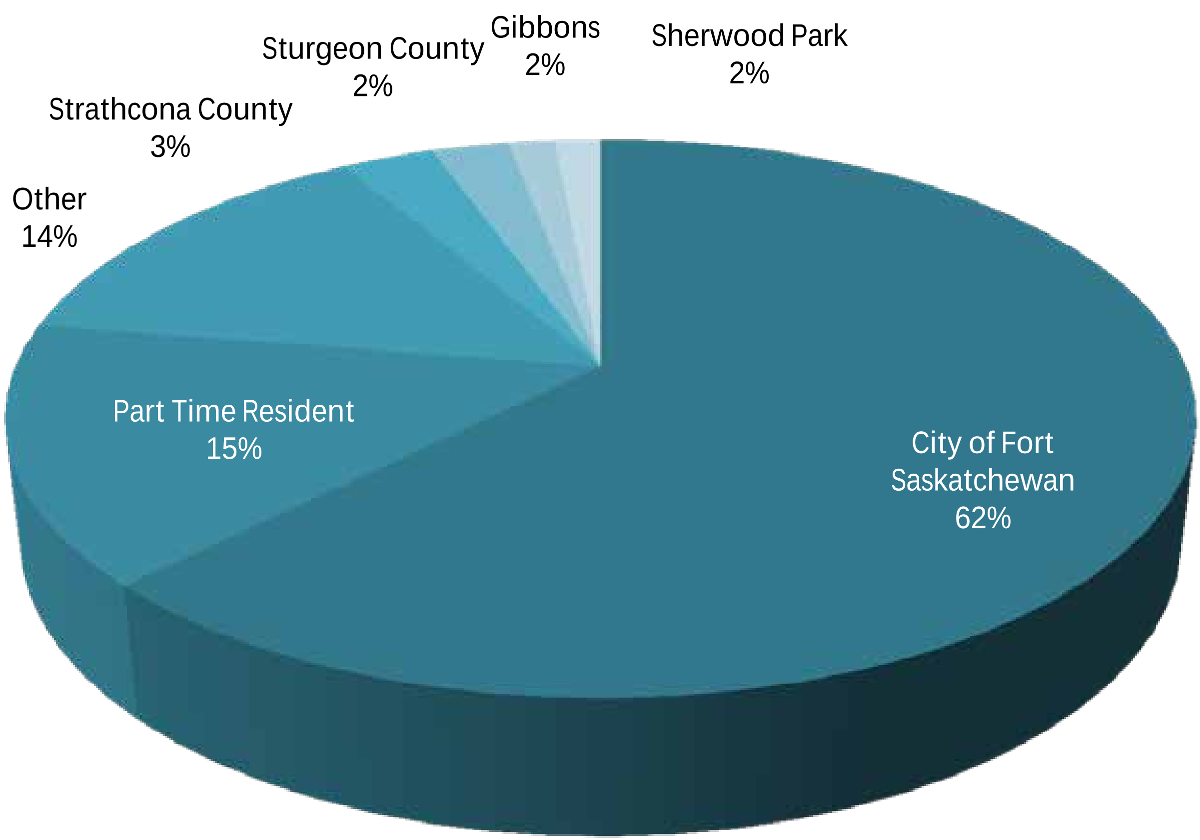
Conversely, the categories exhibiting outflow are all the types of categories that people are prepared to drive 30 - 45 minutes to access, which brings into play a wide array of projects that even includes South Edmonton Common and West Edmonton Mall. The recently completed northeast component of the Anthony Henday will increase acessibility to areas like West Edmonton Mall.

Given Fort Saskatchewan's retail trade area demographics and spending attributes, specific target categories include Grocery, Pharmacy, Personal Services, Toys & Hobbies, Full & Limited Service F&B, Health & Beauty.

A market like Fort Saskatchewan in which inflow exists for specific categories and where it would be difficult to provide a comparison offering that could be competitive in the market is more poignant in that retailers can have the confidence in knowing that demand is already present in a market.

FIGURE 6.1

## CONSUMER SURVEY RESPONDENT BY ORIGIN (2014)



# 6 CONSUMER INTERCEPT SURVEY

## 6.1 INTRODUCTION

As an integral part of the Retail Market & Gap Analysis, a Consumer Intercept Survey was originally conducted in 2014 which the residents of Fort Saskatchewan and the surrounding communities were randomly interviewed.

Respondents were interviewed at strategic locations (Dow Centennial Centre, Cornerstone Centre, Downtown and the Kanata Hotel) in the community to ascertain their preferences for merchandise categories/store types and retailers in the City of Fort Saskatchewan. Other important areas of information gathered through this process included collecting data associated with where residents currently conduct the majority of their shopping, how frequently they shop, how much they spend and what types of formats/stores they prefer.

In total, 200 respondents provided a sample size which ensured the study was statistically valid with a confidence level of 95% and a margin of error of 6.93. Utilizing the Statistical Package for the Social Sciences (SPSS) the data has been prepared in correlation with the study's objectives.

The questionnaire tool and complete Consumer Survey results are provided in **Appendix C**.

## 6.2 RESPONDENT DEMOGRAPHICS

As a foundation for the Consumer Intercept Survey, the locations were chosen to get a valid cross-section of resident and consumer traffic flow in various areas throughout the City.

An important component to determining and validating the Retail Market & Gap Analysis quantification is ensuring that a representative sample of the trade area is interviewed. **Figure 6.1** illustrates the breakdown of Respondent residences for the Consumer Intercept Survey, revealing 62% of respondents currently live in the City of Fort Saskatchewan, with a further dispersed representation from surrounding counties and towns.

Furthermore, **Figure 6.2** illustrates a postal code "heat map" that shows density from which Survey Respondents originated using FSA codes which are the first 3 digits of a postal code (for privacy protection).

**Figure 6.2** clearly illustrates a consistent pattern with the Retail Trade Area documented in **Figure 4.1**, in which the majority of patronage is sourced from the City and surrounding towns, but emanates northwest, north and east, with less dependence on populations to the south.

**Figures 6.3 and 6.4** provide a snapshot of the demographics of the respondents and further validate the statistical demographics by revealing a similar age profile dominated by the 25-44 year old age cohort. Furthermore, 25% of the respondents have a household income of greater than $125,000 and just under 50% of respondents were above $100,000.

## 6.3 PREFERRED SHOPPING LOCATIONS

Consumer Survey respondents were specifically asked the following questions pertaining to their current shopping habits:

FIGURE 6.2

## CONSUMER SURVEY RESPONDENT BY POSTAL CODE (FORWARD SORTATION AREA)

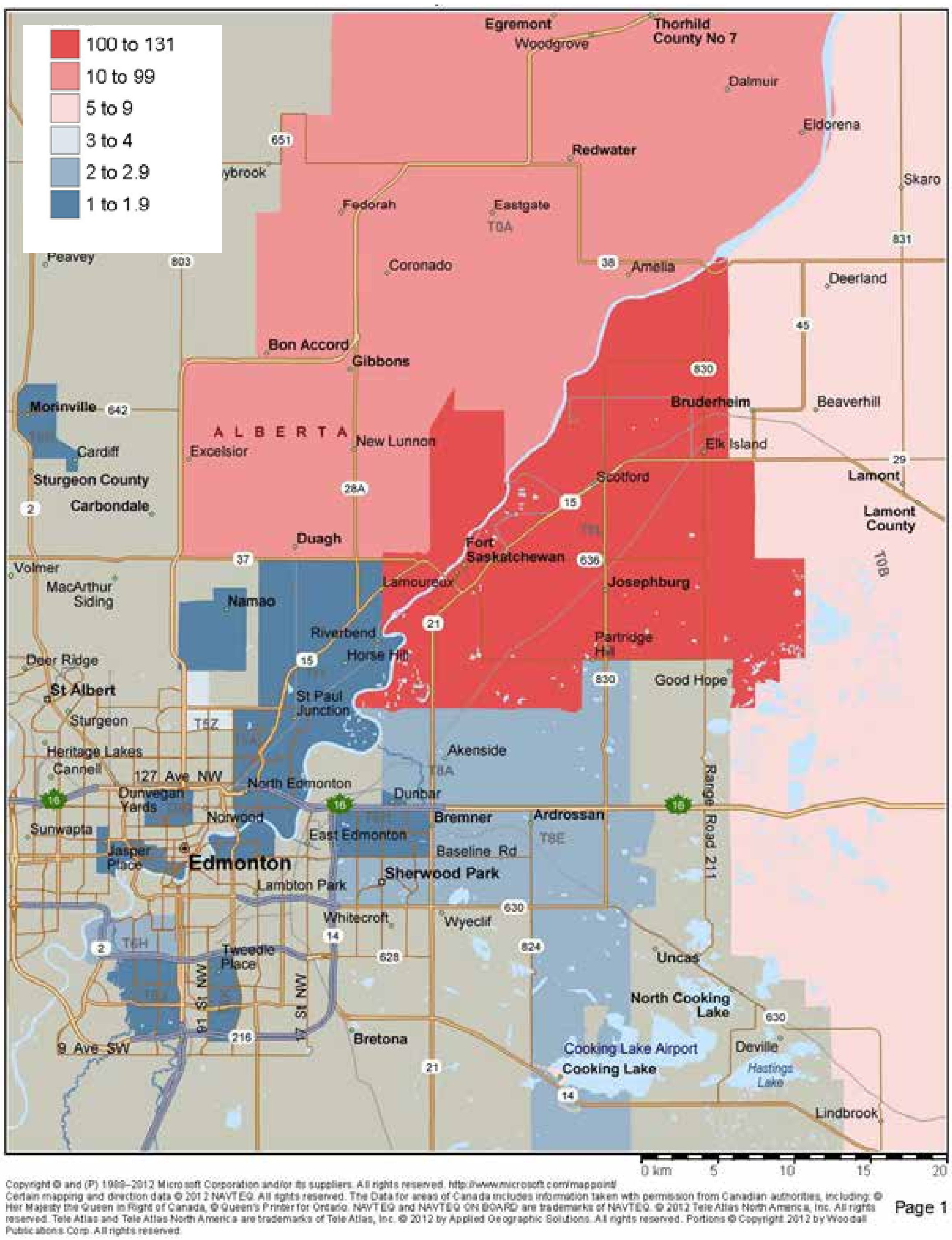


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FIGURE 6.3

## CONSUMER SURVEY AGE PROFILE ALL RESPONDENTS

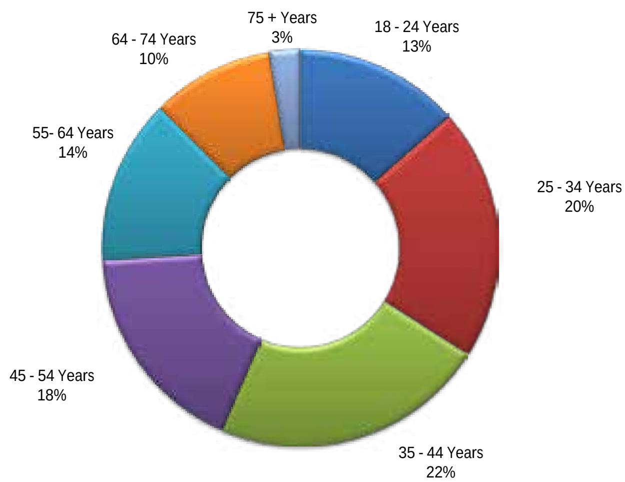
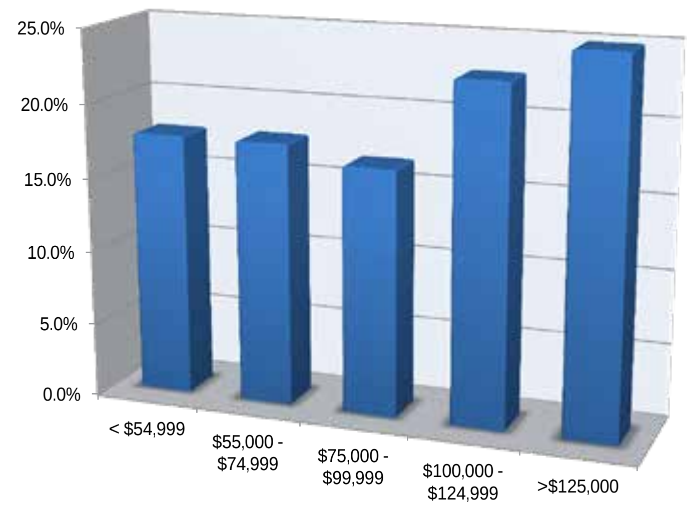



FIGURE 6.4

## CONSUMER SURVEY INCOME PROFILE ALL RESPONDENTS




- What is your primary shopping centre for convenience goods?
- What is your reason for choosing this location?
- What is your primary shopping centre for comparison goods?
- What is your reason for choosing this location?
- What do you most like about the shopping opportunities in Fort Saskatchewan?
- What do you dislike the most about the shopping opportunities in Fort Saskatchewan?

**Figures 6.5 to 6.15** identify the current shopping environment preferences for respondents and reveals expected results as it pertains to locations and decision-making factors. But it also yields insight into what consumers are expecting in the shopping environments, as well as in the merchandise mix and overall offering.

*Primary Convenience Shopping Centre*

**Figures 6.5 and 6.6** indicate that Cornerstone and Safeway is the dominant location for consumers to shop for convenience necessities, such as groceries. The primary reason for this overwhelming dominance is the price of the goods/merchandise as well as the fact that Cornerstone is central to their primary residence and allows for one-stop-shopping.

From a convenience perspective COSTCO, on the other hand did not resonate as highly as expected, although it does rank quite high among the types of shops desired in the community. This would seem to represent a disconnect in consumers' needs vs. wants.

FIGURE 6.5
## WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?

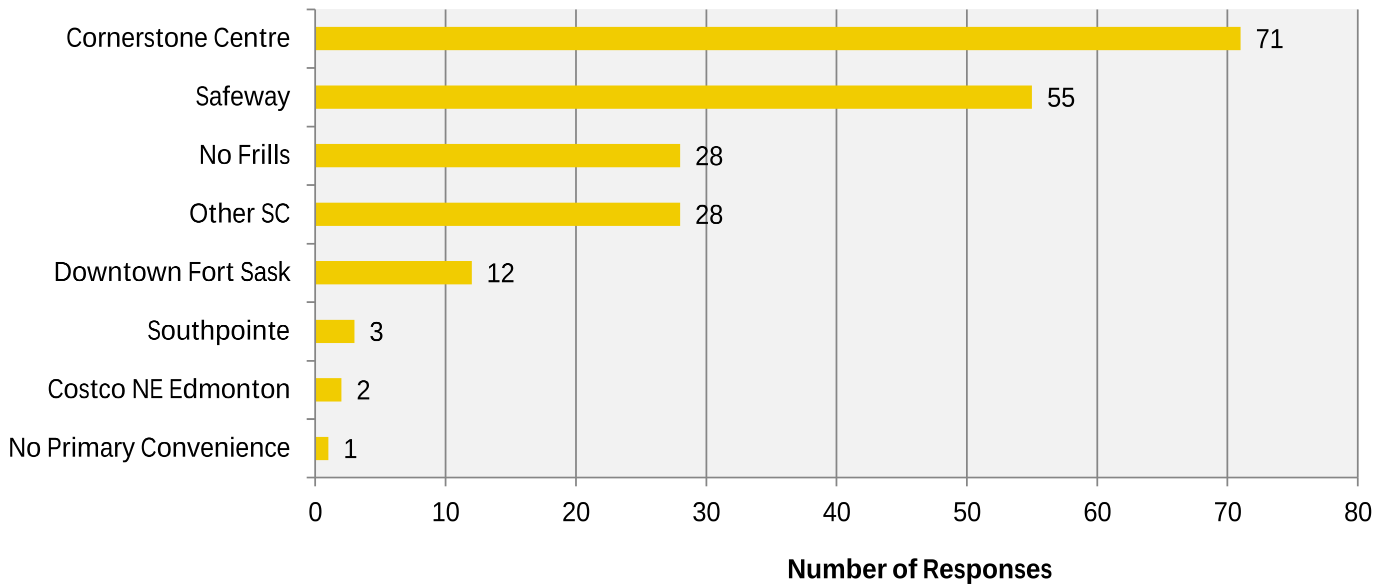
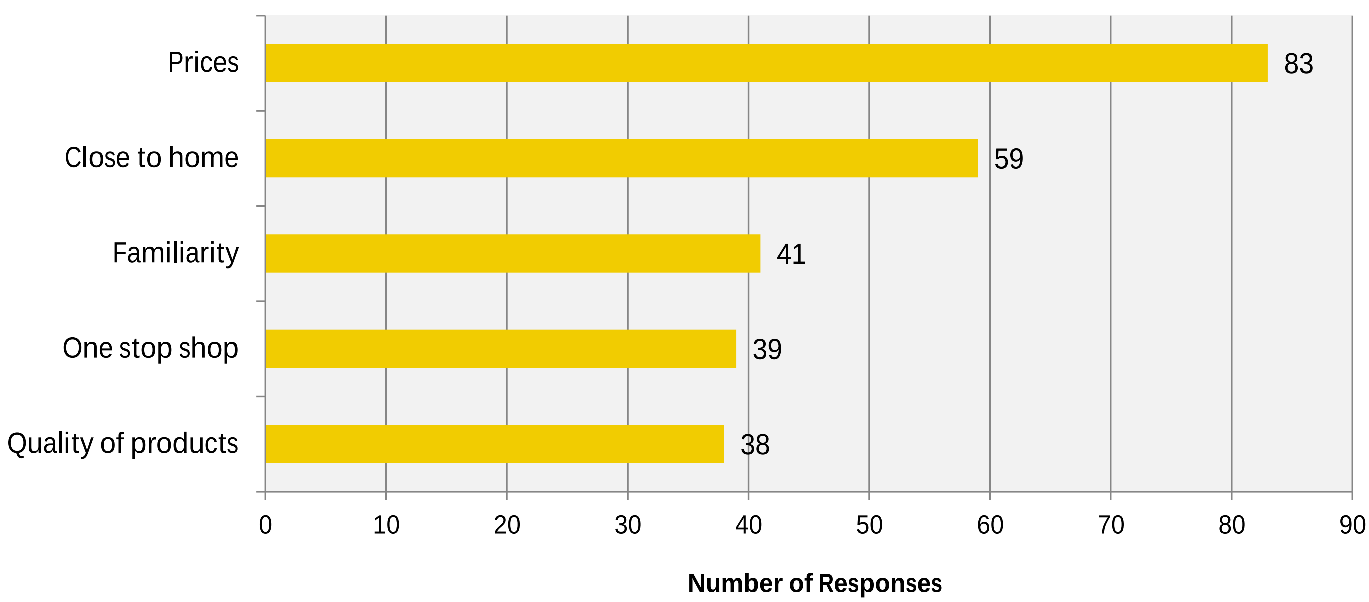



FIGURE 6.5
## WHAT IS YOUR PRIMARY REASON FOR CHOOSING A CONVENIENCE SHOPPING CENTRE?



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*Primary Comparison Shopping Centre*

**Figures 6.7 and 6.8** illustrate that Cornerstone is also the most dominant shopping centre for consumers looking for comparison merchandise, such as Clothing, Footwear, Books, Electronics, House & Home etc.

However, the "other" category which comprises centres such as South Edmonton Common and West Edmonton Mall ranks very highly also in terms of the number of responses.

From a specific location, the Sherwood Park Mall garnered 43 responses suggesting that this is a well-used retail node and given that it is approximately 25 minutes drive time, it is likely to continue as a popular location.

In terms of the reasons for shopping at an identified Comparison shopping location, prices are the most common response, while close to home, familiarity and the ability to one-stop-shop are also important. These factors likely explain the popularity of the Sherwood Park Mall for Fort Saskatchewan residents.

The retail inflow and outflow identified previously clearly illustrates that consumers have a strong willingness to visit retail nodes outside of Fort Saskatchewan for their Convenience and Comparison goods and services.

This trend combined with the population and spending dynamics reinforces the need for Fort Saskatchewan to be cautious in the retailers it targets, since it will be hard to compete against current and emerging comparison retail nodes.

Given the price consciousness of respondents, Fort Saskatchewan could target price points and broader market appeal tenants. For example, tenants such as Real Canadian Superstore, Old Navy, Value Village or JYSK who may not have Fort Saskatchewan on their radar, could be well-served to be presented with the opportunity, so long as another store in their network strategy is feasible and they are not located at Emerald Hills.

The challenge for the majority of fashion retailers would be the requirement for an indoor retail space, such as that provided at Sherwood Park Mall or the requirement for co-tenancy of other complementary or competitive brands.

**Figure 6.14** and the detailed full response in **Appendix C** illustrates a range of tenants that the City or its developers could target. While there are retailers that may not be a realistic fit for Fort Saskatchewan, there are others whom respondents have indicated a preference to have in the City of Fort Saskatchewan that are compatible.

6.4
## LIKES & DISLIKES OF RETAIL IN FORT SASKATCHEWAN

**Figures 6.9 and 6.10** highlight the "likes" and "dislikes" of the respondents as it relates to the current shopping opportunities in Fort Saskatchewan.

Overwhelmingly, respondents like the fact that the shops are close to home and meet their basic needs as well as a very strong response towards supporting local businesses and Downtown Fort Saskatchewan.

FIGURE 6.7
## WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?

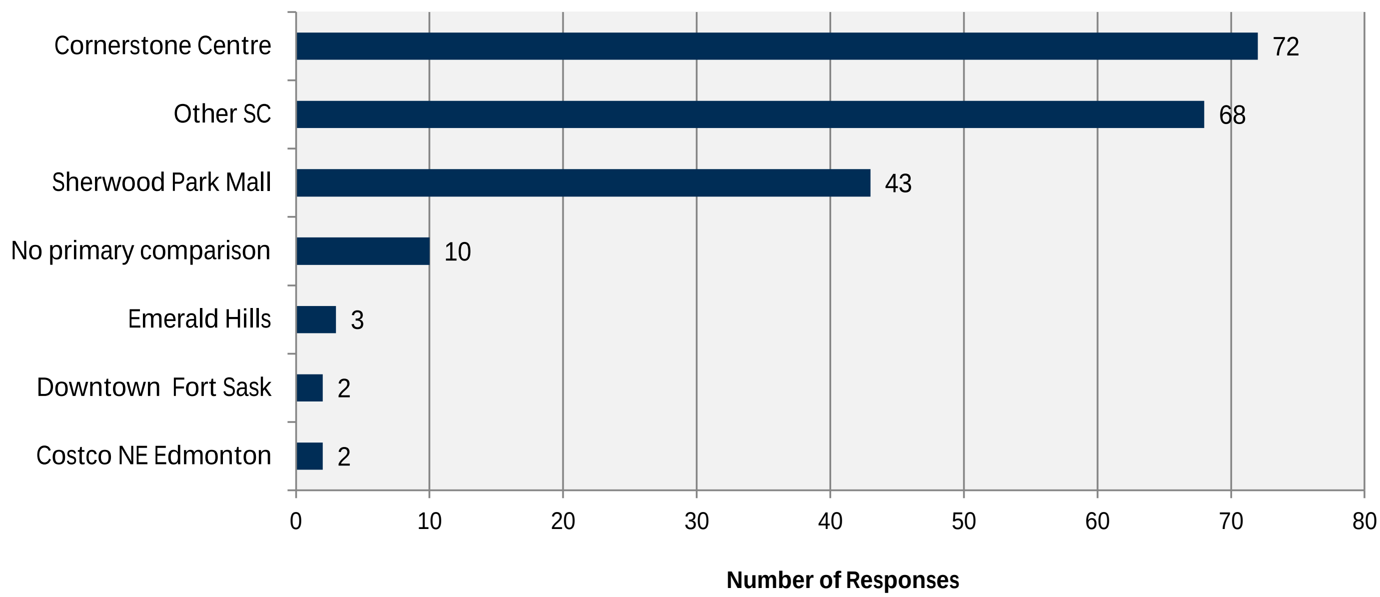



FIGURE 6.8
## WHAT IS YOUR PRIMARY REASON FOR CHOOSING A COMPARISON SHOPPING CENTRE?

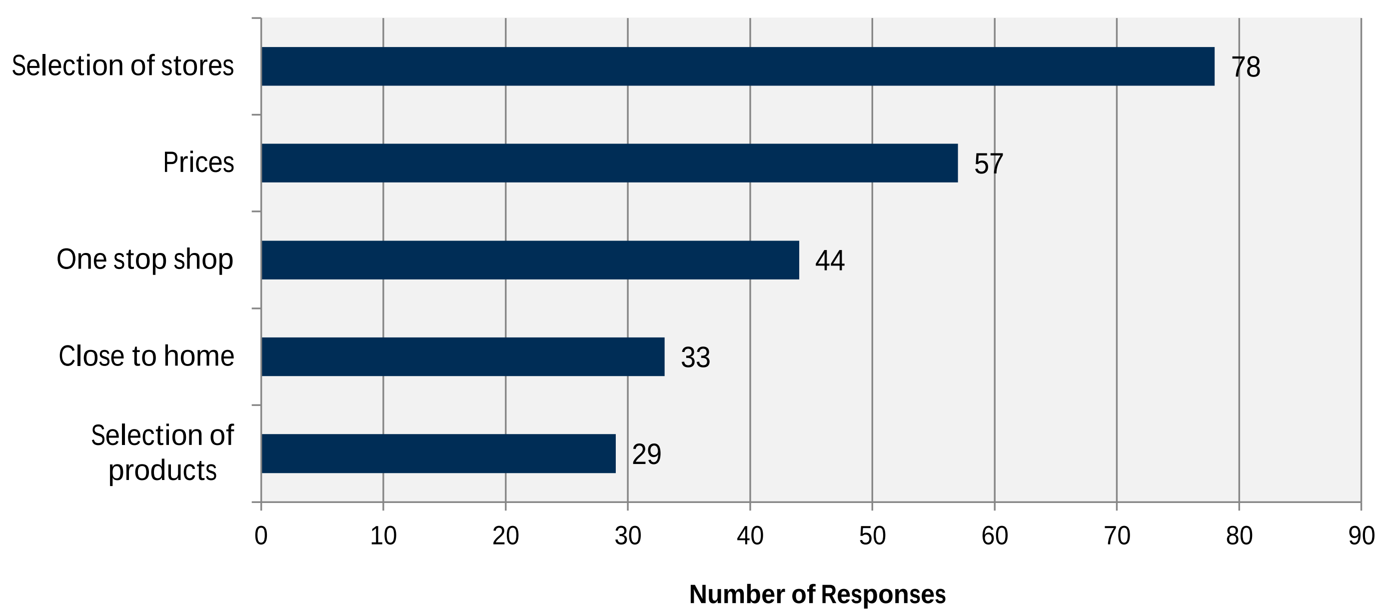


FIGURE 6.9

## WHAT DO YOU LIKE MOST ABOUT SHOPPING IN FORT SASKATCHEWAN?

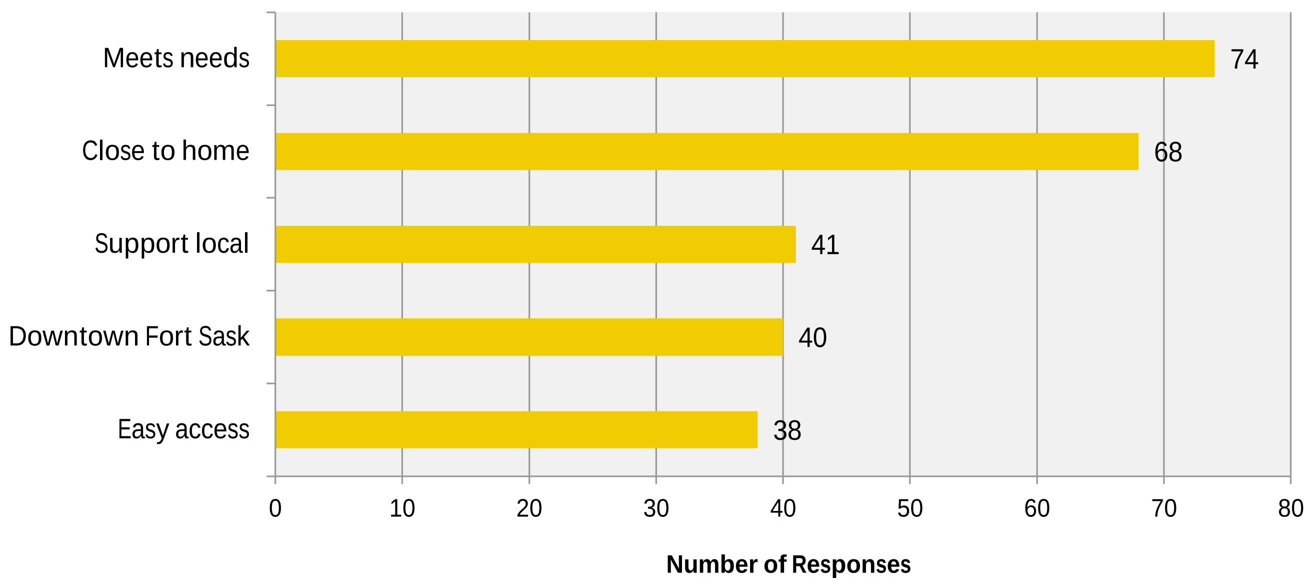



FIGURE 6.10

## WHAT DO YOU DISLIKE MOST ABOUT SHOPPING IN FORT SASKATCHEWAN?

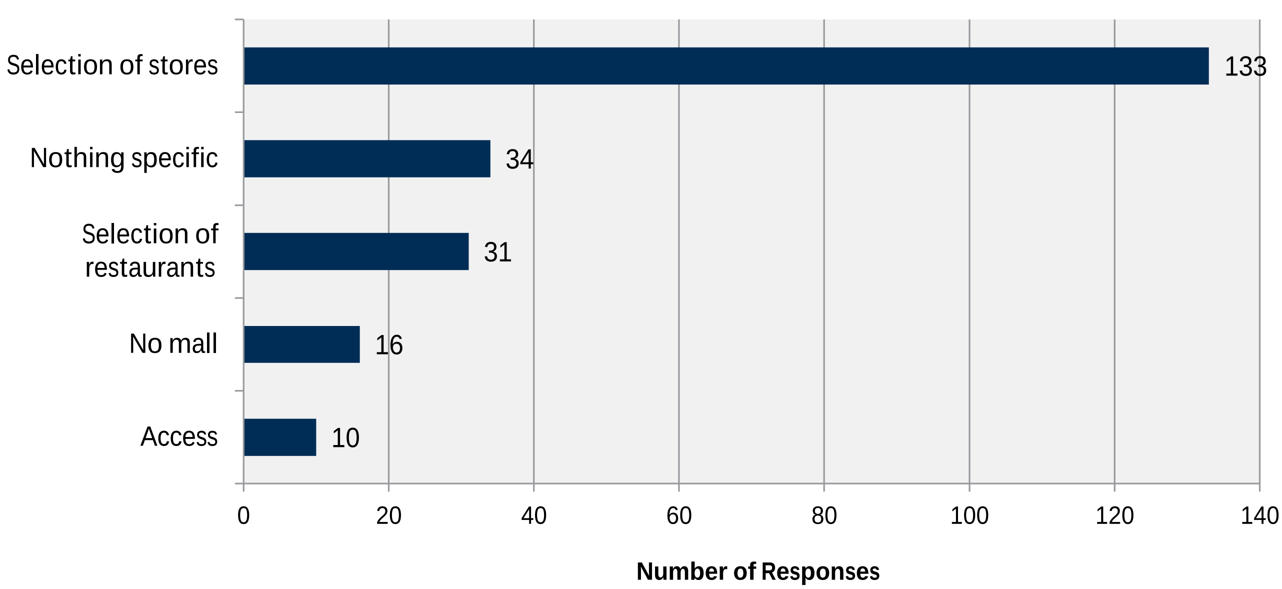
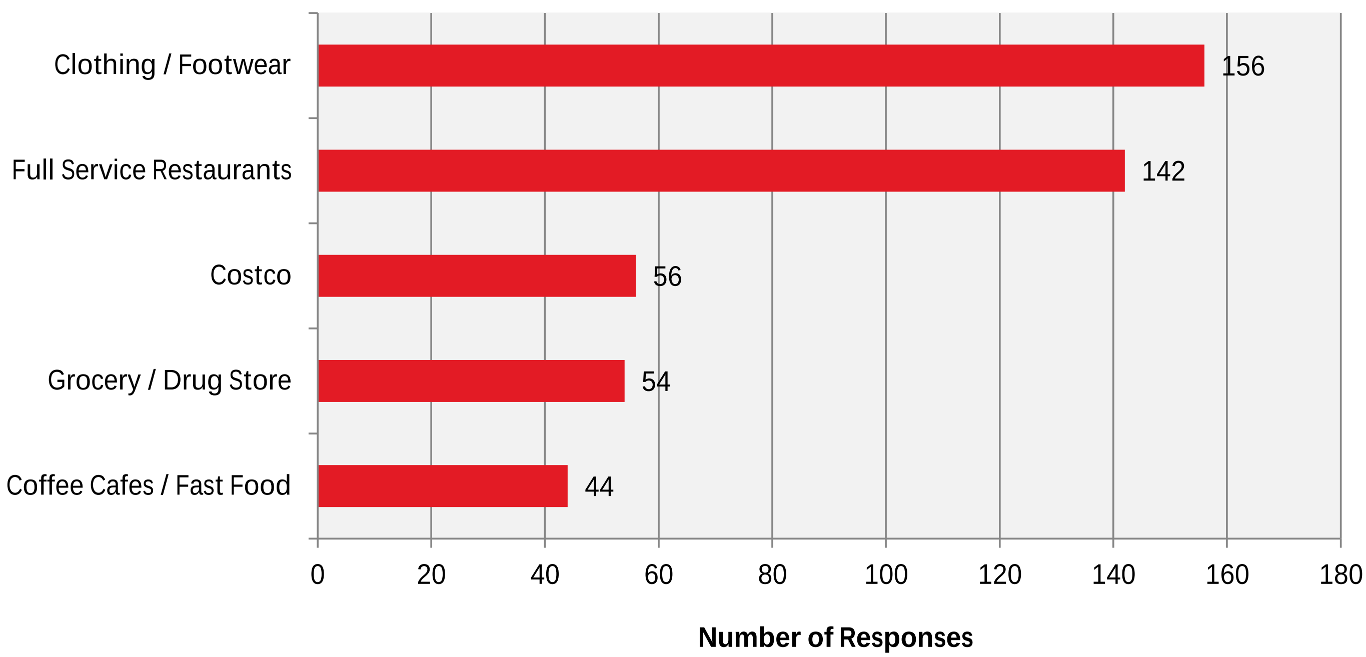


FIGURE 6.11

## WHAT NEW STORES/SERVICES WOULD INCREASE YOUR SPENDING IN FORT SASKATCHEWAN?



It is worth reiterating that with the City's current 'relative' balance of supply to demand that the Downtown should be a key consideration when thinking of new retail developments, other than those already approved and under construction, such as Westpark.

It is encouraging that respondents have such a high response rate to supporting local and Downtown Fort Saskatchewan.

The selection of shops and restaurants were each mentioned as a dislike. As the Fort Saskatchewan market continues to grow, it is to be expected that respondents will want more shops and services. Achieving the balance of the types of shops and services the residents want with the types of shops and services that are compatible with the City's demographics, trade area and development projects will be the key to success.

The trend of a market to want a better selection of shops is a reflection on the aspirational nature of the consumer: they are responding positively to the growth and introduction of stores in the market, but still want to have more retailers that they are accustomed to seeing in other markets such as Edmonton, even if the reality is that they may not locate in Fort Saskatchewan.

This is most accurately depicted in **Figure 6.11** which reveals overwhelming respondents' desires for more clothing/footwear. While there are brands in the market, such as Old Navy or Children's Place that would be compatible fits for Fort Saskatchewan, the reality is that the city is more likely to attract full service restaurants.

**Figures 6.12 through 6.14** provide a list of shops and restaurants that could locate in Fort Saskatchewan's various retail nodes/formats.

6.5
## DESIRED SHOPS & SERVICES

**Figures 6.11 through 6.15** illustrate the responses to questions that sought the following:

1. What New Stores/Services would increase your spending in Fort Saskatchewan? (**Figure 6.11**)
2. What Full-Service Restaurants do you want to see in Fort Saskatchewan? (**Figure 6.12**)
3. What Limited-Service Restaurants do you want to see in Fort Saskatchewan? (**Figure 6.13**)
4. What Retail Stores do you want to see in Fort Saskatchewan? (**Figure 6.14**)
5. What types of stores do you want to see in Fort Saskatchewan? (**Figure 6.15**)

Referring to **Figure 6.11,** which allows for multiple responses, respondents overwhelmingly want to see more Clothing & Footwear stores (156 responses) and Full-Service Restaurants (142 responses) in Fort Saskatchewan. An increase in the quality and quantity of the above two categories would be well-received by the respondents and overall trade area residents.

Similarly, though to a slightly lesser degree, Costco was singled out as a retailer desired in Fort Saskatchewan.

A reflection of the more localized nature of Fort Saskatchewan's trade area is evidenced in the desire to have more Grocery/Drug Store and Limited Service Food & Beverage in the City. These are the types of tenants that should be prioritized for targeting along with Full Service Restaurants.

# THE KEG & EARL'S

## MOST CITED RESTAURANTS DESIRED BY CONSUMER RESPONDENTS

FIGURE 6.12

WHAT FULL-SERVICE RESTAURANTS DO YOU WANT TO SEE IN FORT SASKATCHEWAN?

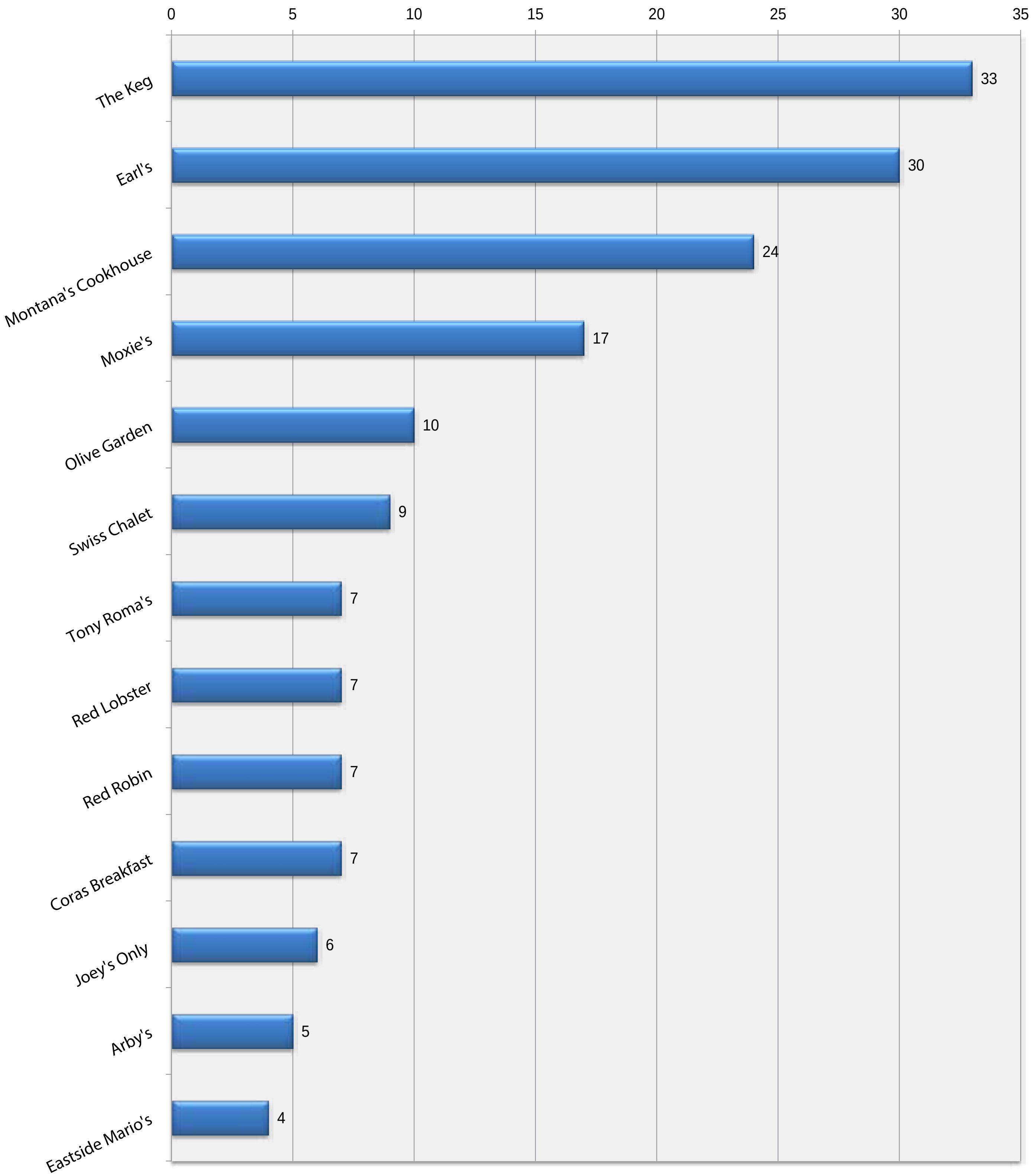


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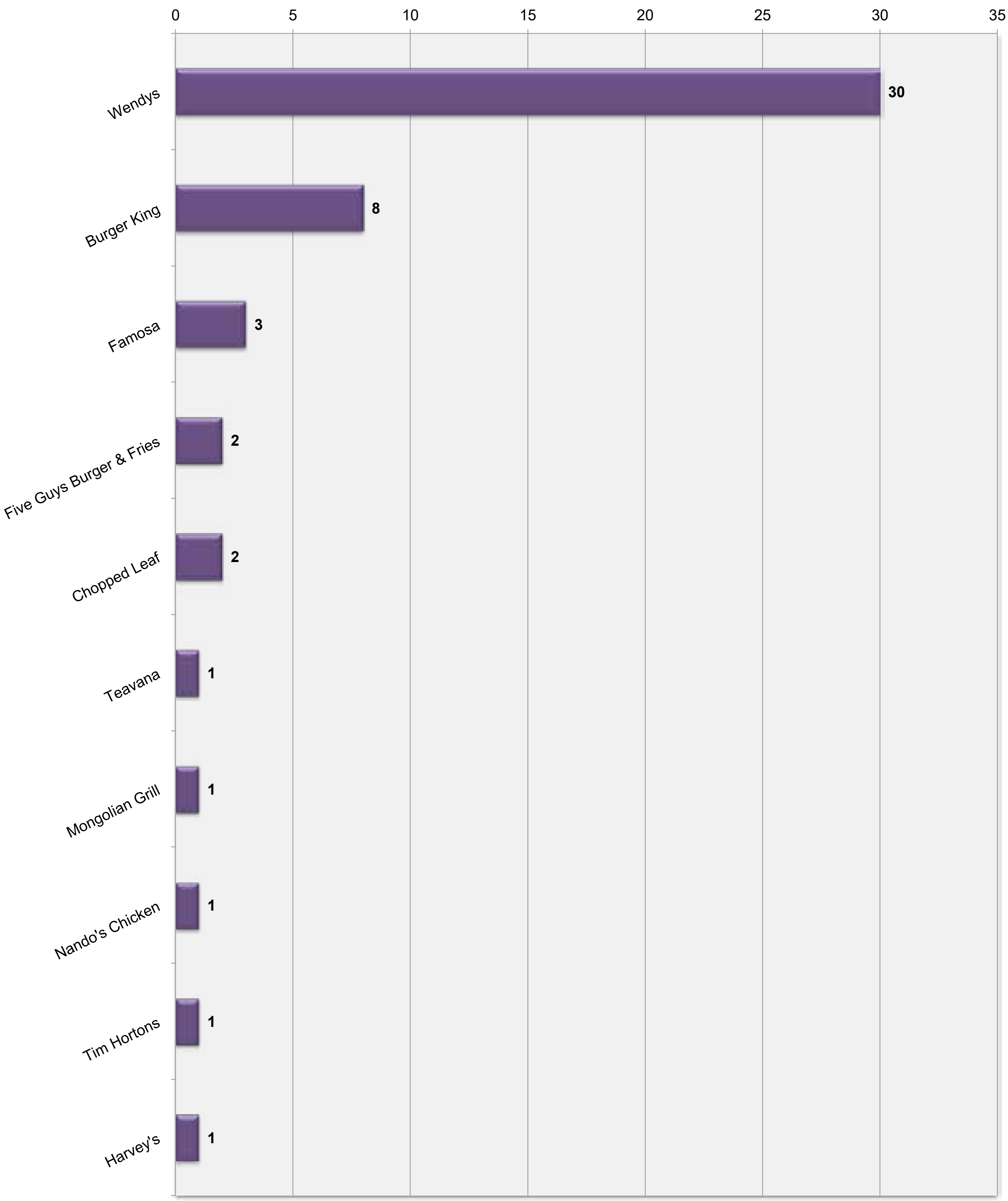
FIGURE 6.13

## WHAT LIMITED-SERVICE RESTAURANTS DO YOU WANT TO SEE IN FORT SASKATCHEWAN?



# COSTCO

## MOST CITED RETAILER DESIRED BY CONSUMER RESPONDENTS

FIGURE 6.14
### WHAT RETAIL STORES DO YOU WANT TO SEE IN FORT SASKATCHEWAN?

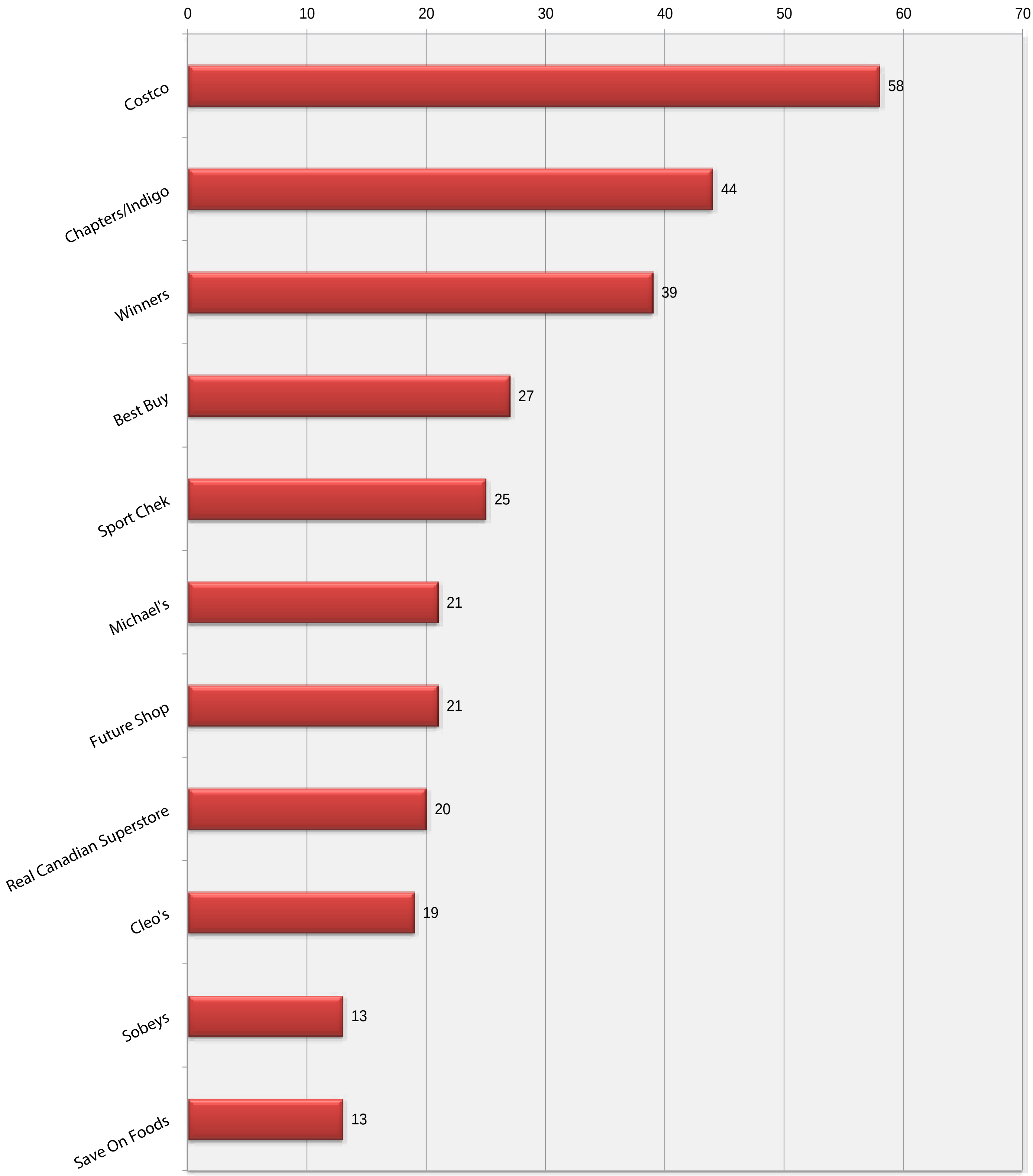


FIGURE 6.15

## WHAT TYPES OF STORES DO YOU WANT TO SEE IN FORT SASKATCHEWAN?

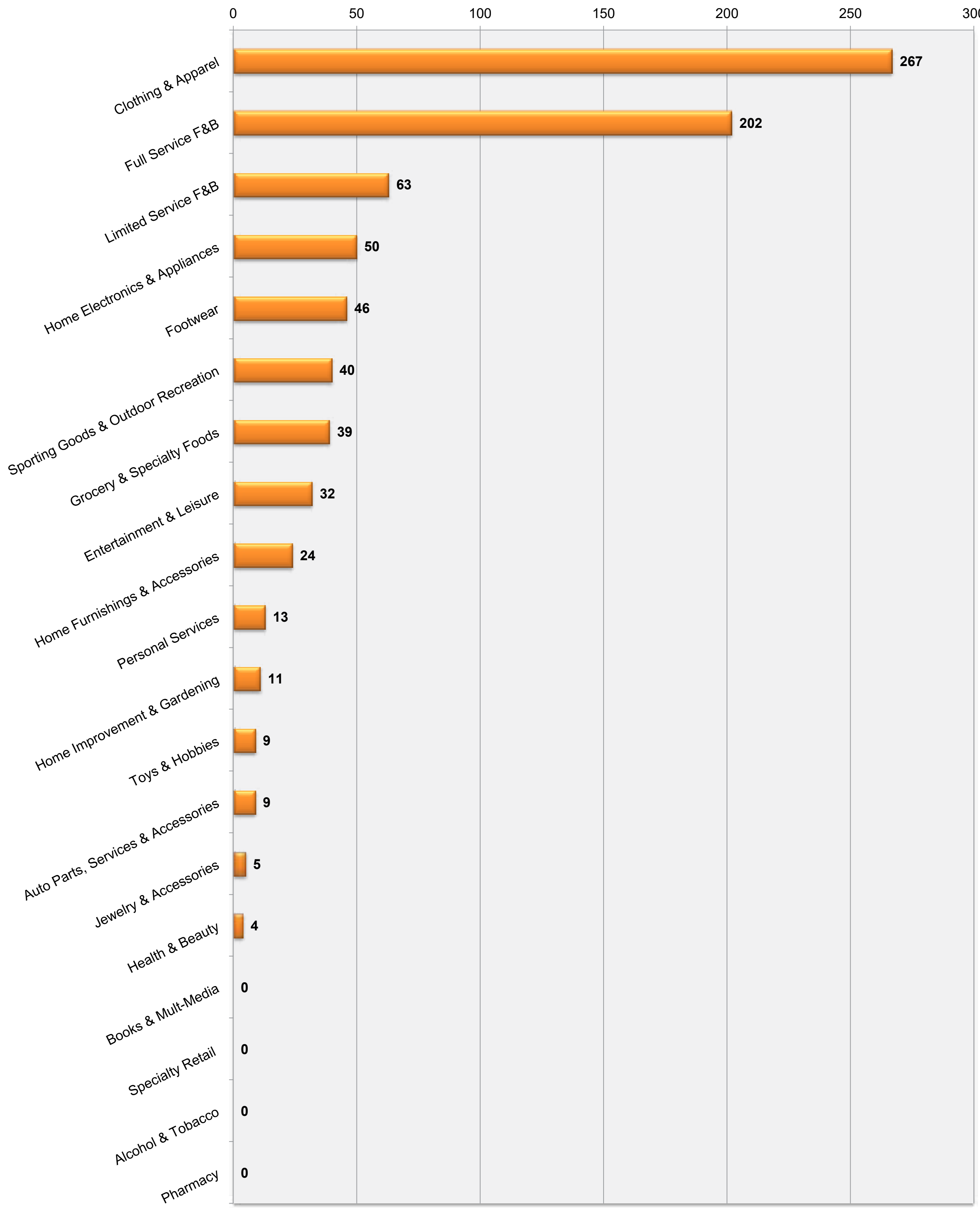


FIGURE 6.16

## SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESIDENT RESPONDENTS

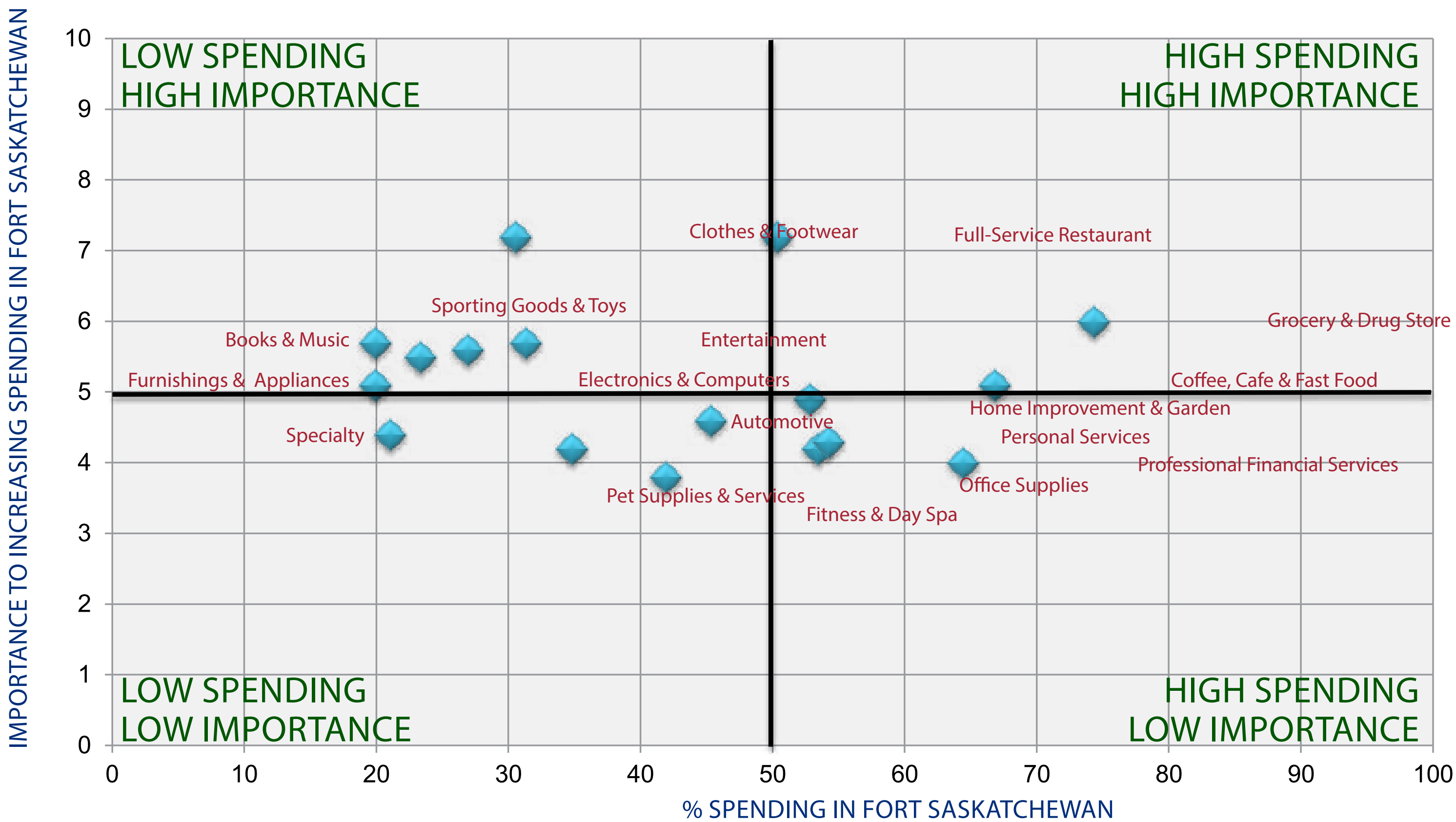
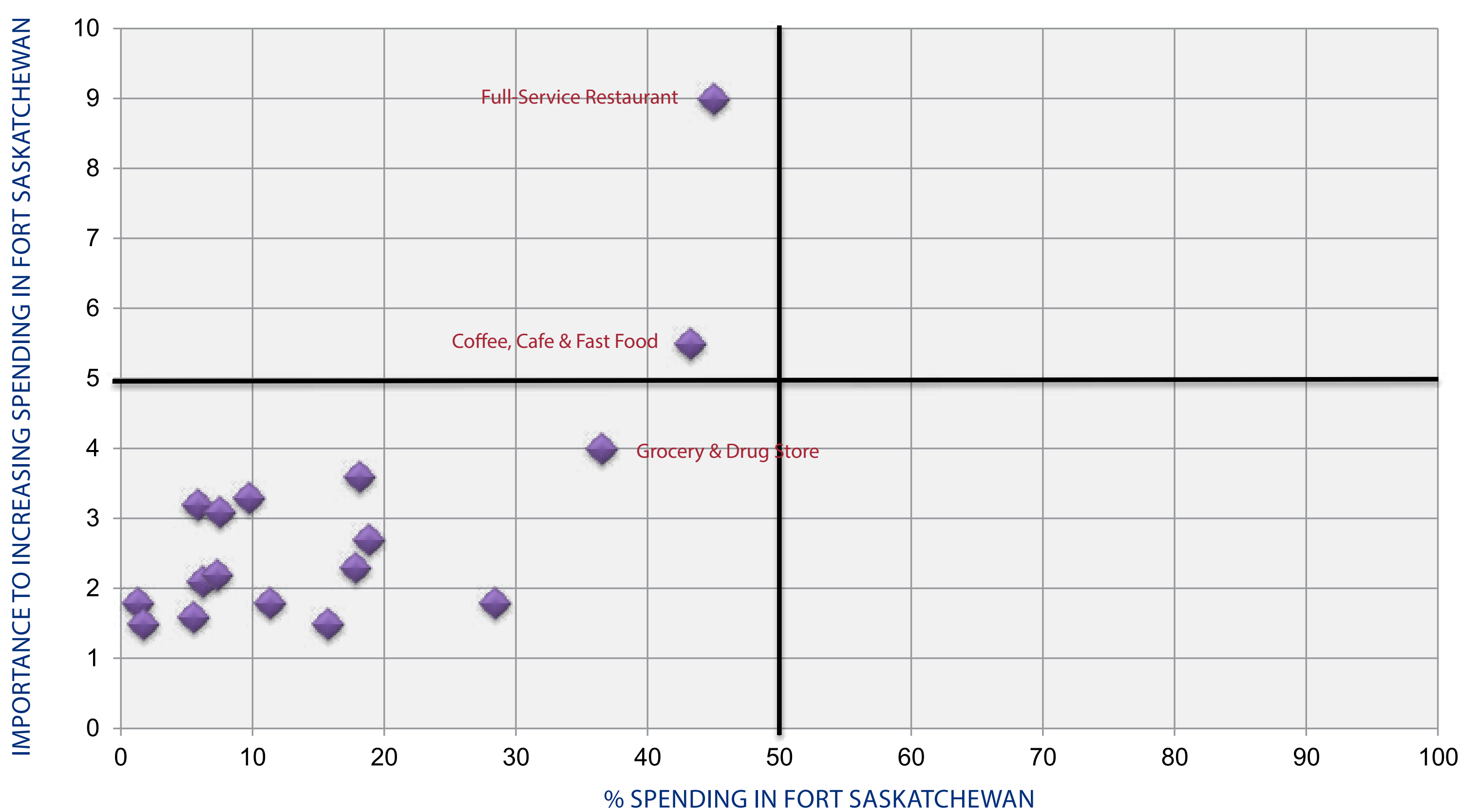



FIGURE 6.17

## SPENDING VERSUS IMPORTANCE RATINGS FOR TEMPORARY RESIDENTS



# 6 FULL-SERVICE F&B GROCERY & DRUGSTORE

## MOST SOUGHT RETAIL CATEGORIES BY CONSUMER RESPONDENTS

In response to the desire to see more Full-Service Restaurants (i.e. those with table service) in Fort Saskatchewan, **Figure 6.12** specifically asked respondents for tenant names. This question elicited a significant response for the following:

1. *The Keg*
2. *Earl's*
3. *Montana's*
4. *Moxie's*

Full-Service Restaurants, such as those identified are most likely to locate in high customer traffic and popular shopping areas such as Cornerstone or Westpark.

While Fort Saskatchewan has a strong contingent of Limited Service Restaurants (i.e. those without table service), there was still a strong response indicated for more Limited Service Restaurants. What is most compelling from the responses however is that Wendy's was the overwhelming identified retailer sought in the community.

Cafes and coffee shops continue to be in high demand with optimal locations available throughout the City.

This suggests opportunities for more local independents, for whom areas in the Downtown core could be strong. In downtowns such as Fort Saskatchewan's where external development pressures have created challenges, it is often the local merchants and businesses that have the ability to create a shop local culture in redefining downtown spaces.

**Figure 6.14** illustrated a desire to have many formats that would be junior box or larger in size.

It is reasonable to assume that these tenants, some of whom are already at Emerald Hills, such as Winners, would be more enticed to locate in Emerald Hills than Fort Saskatchewan simply given the trade area penetration.

There may be some degree of opportunity to attract these users, though it would probably be in the best interest of the City to target smaller retailers that could infill in the existing retail nodes with targeted categories and retailers that are inherently more compatible with Fort Saskatchewan's trade area.

### 6.6 ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

**Figures 6.16 to 6.21** take a more honed in approach in looking at the Consumer Responses by seeing where differences may exist in spending and importance ratings by Full Time vs. Part-Time Respondent, Age Cohort and Household Income.

The initial process is to illustrate for ALL Respondents, the correlation or possibly lack thereof between the amount of spending in Fort Saskatchewan on Retail Categories and the Respondents' importance for a respective category in increasing their spending in the City.

The results shown diagrammatically in **Figure 6.16** shows that the categories of Full Service Restaurants and Grocery/Drug Store have the highest proportion of spending inside Fort Saskatchewan, yet still have among the highest importance ratings for retaining further spending.

FIGURE 6.18

## PERCENTAGE SPENDING IN FORT SASKATCHEWAN BY RESPONDENT AGE COHORT

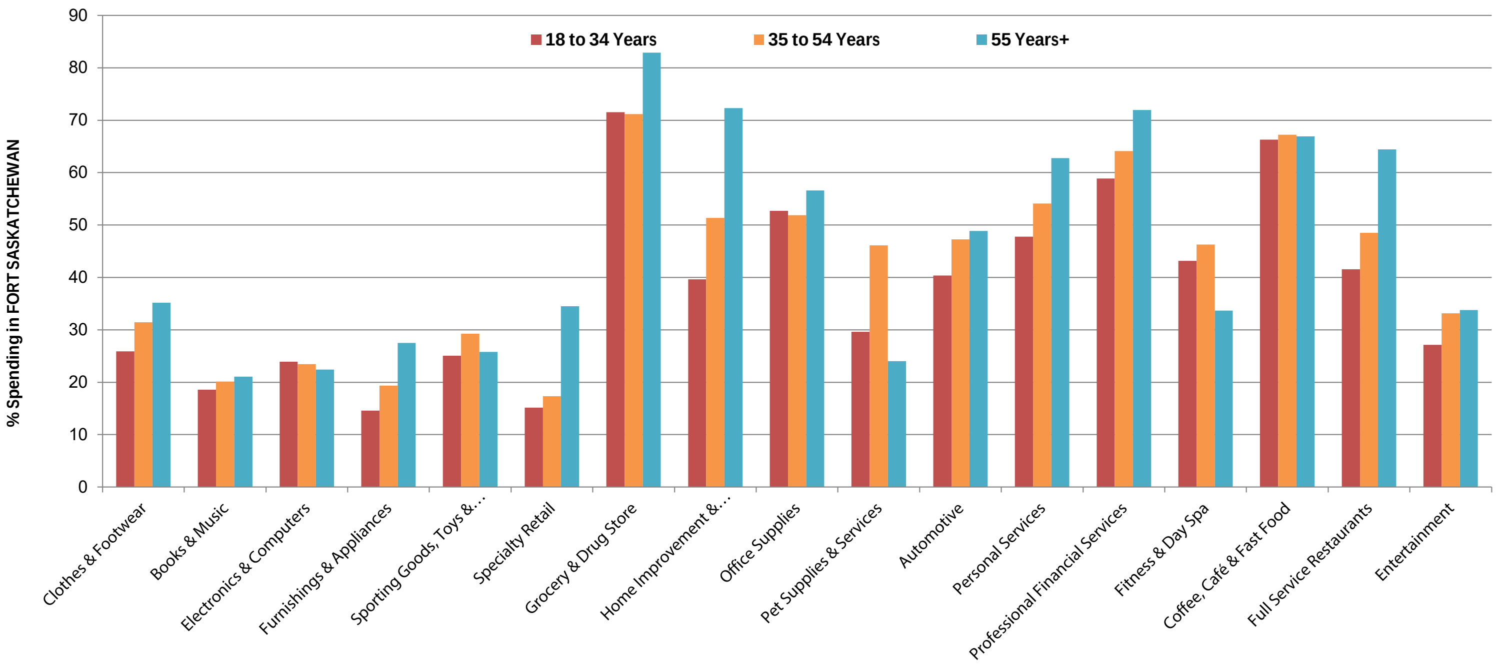
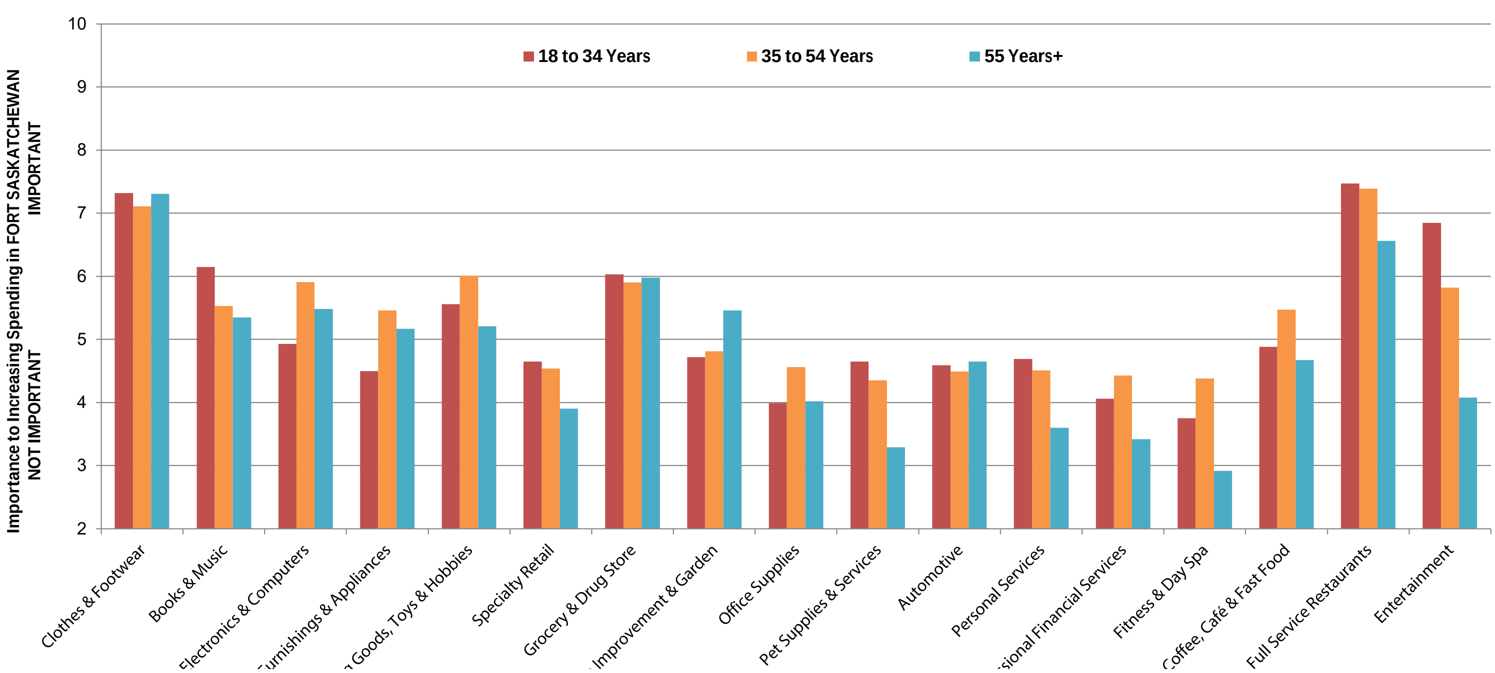



FIGURE 6.19

## IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT AGE COHORT



# 6

Although spending on Clothes and Footwear is not high in Fort Saskatchewan, **Figure 6.16** does imply through its importance rating that if more Clothes and Footwear were introduced more spending could be retained in Fort Saskatchewan.

**Figure 6.17** illustrates the part-time residents spending vs. importance and reveals a clear distinction that full service restaurants would be the most important retail category to increasing their spending in Fort Saskatchewan.

In the spectrum of low spending to high importance, the respondents clearly would like to see more offering of comparison merchandise in the City. For residents of the City of Fort Saskatchewan, an increase in the amount and/or quality of Full Service Restaurants and Grocery/ Pharmacy as well as compatible Clothes & Footwear could go a long way in retaining further spending

## 6.7 RESPONDENT CROSS-TABULATIONS OF SPENDING VERSUS IMPORTANCE

The process of cross-tabulating the former responses for ALL respondents and breaking them down into Age and Income sheds some refined analysis to the retail market and can also help to further identify the types of tenants that would find Fort Saskatchewan a strategic fit in their store network development strategy.

*Spending & Importance By Respondent Age*

**Figures 6.18 & 6.19** illustrate the spending and importance ratings for respondents as broken down into the Respondent Age Cohort.

- *18 - 34 Years*
- *35 - 54 Years*
- *55 + Years*

An examination of the spending and importance by age indicates some clear distinctions between the younger and older age cohorts in the City.

In terms of spending retained INSIDE Fort Saskatchewan, the Baby Boomers or those 55 years and older have the strongest spending profile across almost all categories, but most notably for categories such as Grocery, Home Improvement, Specialty Retail, Personal Services, Professional Financial Services and Full Service Restaurants. However, when looking at the importance of these same categories to increasing spending, the Baby Boomer segment does not place as high a value on these as do the emerging younger age cohorts.

The implications of this finding are two-fold. Firstly, while the Baby Boomers are a strong spending segment today, they are not the growth demographic in the Fort Saskatchewan Market, as evidenced by the average age at just over 35 years. Moreover, this pattern suggests that the Baby Boomers are generally happy and satisfied with the offering in the City of Fort Saskatchewan, while the emerging growth cohort are not as satisfied and are seeking new experiences and formats and are thus most likely to be the ones leaving Fort Saskatchewan for items like Clothing and Restaurants.

Secondly, and most importantly is the fact that the young family demographic, aged 18-34 years, with emerging incomes and young families have the greatest desire to see more offering in the community as a way of retaining their spending.

FIGURE 6.20

## PERCENTAGE SPENDING IN FORT SASKATCHEWAN BY RESPONDENT HOUSEHOLD INCOME

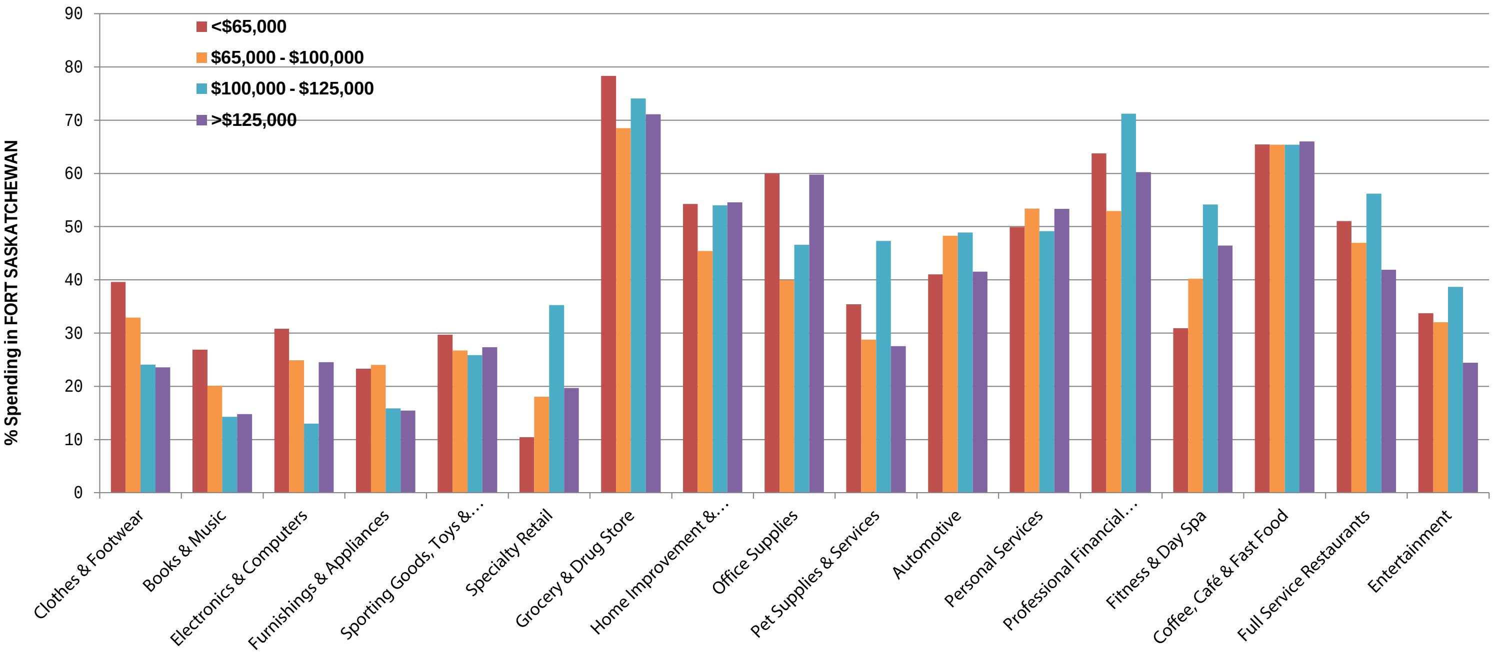
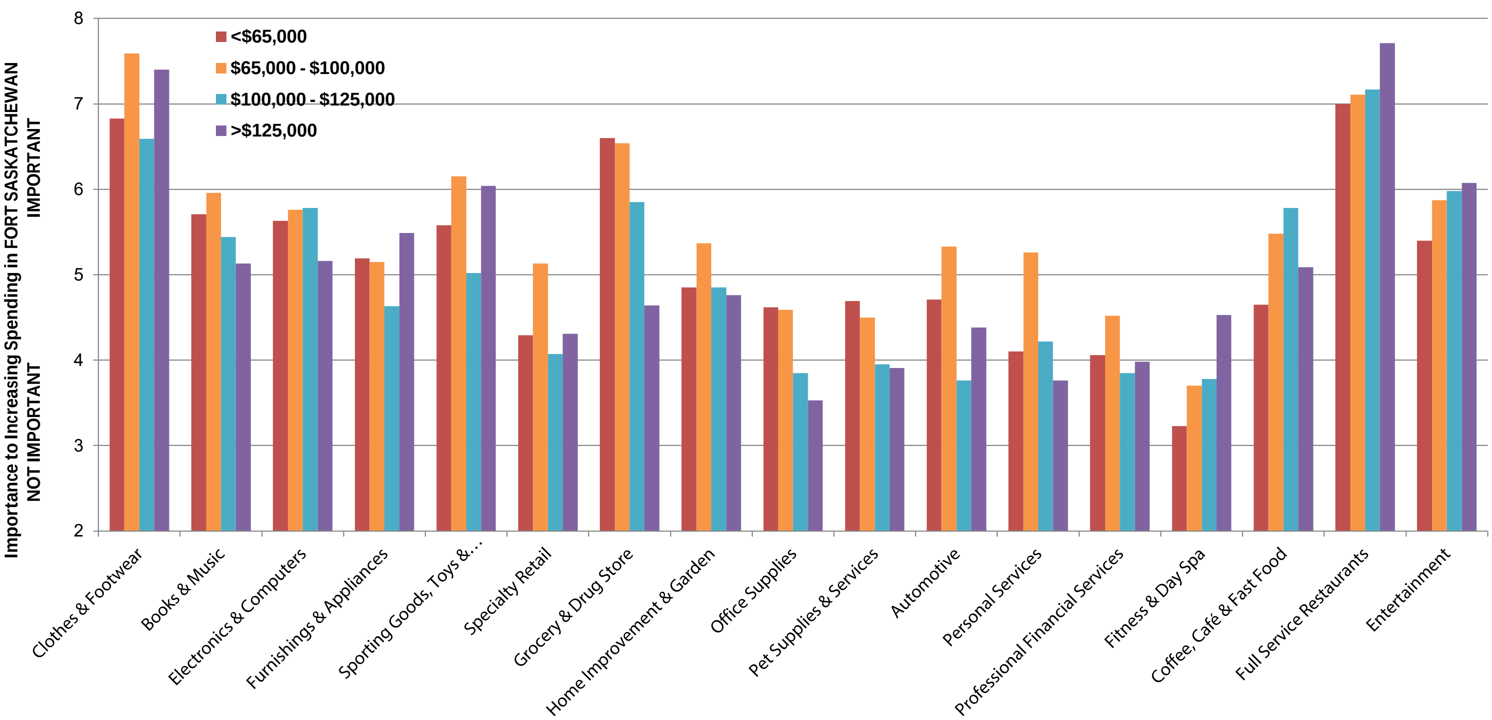



FIGURE 6.21

## IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT HOUSEHOLD INCOME



Moreover, it is this demographic age group that also has the largest representation in the trade area and as such has the most aggregate spending power for retailers to tap into.

Prospective retailers will realize the opportunity to cater to a market for which there are many more potential tenant opportunities. Specifically, those within the 18 - 34 year old age cohort are most likely to benefit from improvements in the retail offering in Fort Saskatchewan.

The 18 - 34 year old age cohort represents the dominant age bracket for spending on entertainment and equally has the highest importance on entertainment to increase their spending. Similar to the 18 - 34 year old market, the 35 - 54 year olds are also a strong spending demographic.

Retail spending has thus far catered more to the older demographic, but as the age profile illustrates, future emphasis should be geared toward the next generation of consumers who want to support the Fort Saskatchewan local businesses, but equally are prepared to leave Fort Saskatchewan for purchases.

*Spending & Importance By Respondent Household Income*

**Figures 6.20 & 6.21** illustrate the spending and importance ratings for respondents as broken down into the Respondent Household Income.

- *<$65,000*
- *$65,000 - $100,000*
- *$100,000 - $125,000*
- *>$125,000*

An examination of the spending and importance by income also illustrates some slight variations in preferences, which in turn can be reflective of the types of targeted categories and tenants.

One would expect that the highest income segment (i.e. those earning more than $100,000) would spend the most across the board on retail shopping, leisure and entertainment.

In fact, while that is true for some categories such as Clothing & Footwear, Home Furnishings & Appliances and Full Service Restaurants, the income bracket comprising $65,000 to $100,000 exhibits the strongest expenditure patterns in the City for the majority of categories and in particular Clothing & Footwear, Books & Music, Sporting Goods Toys & Hobbies, Automotive and Personal Services.

**Figure 6.21** illustrates a pattern whereby Clothing and Footwear and Sporting Goods, Toys & Hobbies would be most desired by the $65,000 - $100,000 income bracket. Since these categories are most likely indicative of the family forming years, it would further suggest that the types of retailers would be more family oriented, casual and value priced (e.g. Old Navy).

The highest income segment (>$125,000) have a very strong desire to have more Clothing and Restaurants in Fort Saskatchewan.

Grocery/Drug Store have a much higher importance for incomes below $100,000 than for those above. This suggests that the market could support a traditional grocery like a Save On Foods or Real Canadian Superstore, although the latter would likely require an adjustment or relocation of the No Fills, which is a Loblaws format.

Daily Grind Coffee, Montana | designed by Cushing Terrell

# 6

## 6.8
## SUMMARY & IMPLICATIONS

The Consumer Intercept Survey yielded findings that reinforce the more localized trade area for the City of Fort Saskatchewan.

The majority of respondents indicated a desire to have more Clothing & Footwear, Full Service Restaurants and Grocery. These particular categories were not only identified as specific categories, but the spending patterns and importance ratings of the respondents validated these sentiments.

Respondents identified a number of recognized restaurant and retailer brands. While Fort Saskatchewan is well positioned to attract many of the full and limited service restaurants identified, caution should be exercised as it relates to the list of comparison retailers. Many of the desired comparison retailers are mid to larger formats who are likely to be drawn to new developments at Emerald Hills and/or Manning Town Centre.

As such, Fort Saskatchewan should use the Consumer Survey trends that suggest targeting smaller more value-oriented retailers that could infill existing retail nodes, thus not necessitating another new retail node or nodes of any consequence.

The types of tenants sought by respondents combined with their spending patterns suggests that the most compatible locations capable of fulfilling retailer site location requirements will likely fall in the Central and South nodes and to a lesser degree the Downtown, although the redevelopment of the Fort Mall will provide a significant and viable option for tenants looking for newer space at potentially more affordable rates.

The Downtown area will continue to face external pressures resulting from continued growth on the fringe of the City. The Downtown is still recognized as a key node that can accommodate future tenant opportunities, particularly in the specialty retail, food & beverage categories and personal services categories.

The most significant appeal of Fort Saskatchewan's retail market is the strength and spending propensity of the high earning and fast growing young family segment in the 18 to 55 year age range.

A young, family-oriented market, with disposable incomes is a core prerequisite many retailers look for when selecting a market. Combined with Fort Saskatchewan's trade area and validation from the Consumer Intercept Survey, the Fort Saskatchewan market is well-positioned to attract specifically targeted categories and tenants.

# 35.6

CITY OF FORT SASKATCHEWAN AVERAGE AGE

# 34%

CITY OF FORT SASKATCHEWAN RESIDENTS WITH HOUSEHOLD INCOMES >$125,000

# 38,700+

RETAIL TRADE AREA POPULATION (JULY 2016 ESTIMATE)

# $35 Million

TOTAL TRADE AREA RETAIL SPENDING ON FULL SERVICE RESTAURANTS

# 36

NUMBER OF QUICK SERVICE RESTAURANTS IN THE CITY OF FORT SASKATCHEWAN

# 3.4%

CITY OF FORT SASKATCHEWAN RETAIL VACANCY

Photo credit: Cushing Terrell Architecture Inc. 2014

# 7 CONCLUSION

7.1
## FINDINGS & CONSIDERATIONS

The Retail Market & Gap Analysis for the City of Fort Saskatchewan entailed an extensive process that included the following methodological stages:

- *A detailed tabulation of the city's existing retail inventory further allocated into retail categories and sensitized by node and estimated retail sales performance;*
- *A Consumer Intercept Survey at various locations in Fort Saskatchewan to ascertain respondent origins, spending habits and preferences;*
- *A methodical and rationalized market area penetration resulting in a validated Retail Trade Area with population and detailed retail spending on a category-by-category basis;*
- *A quantification of the City's current supply versus demand in terms of supportable retail floorspace and resulting sales inflow and outflow estimates.*

The results of the Market Analysis yielded the following key findings and considerations for the City of Fort Saskatchewan's retail environment:

*KEY FINDINGS:*

- Fort Saskatchewan's demographic profile is comprised of a young, family demographic with an emerging affluence and corresponding discretionary income.
- Fort Saskatchewan's Retail Trade Area catchment serves a market of over 38,000 full time residents, which is forecast to increase by an additional 7,300 new residents over the next decade.
- The City of Fort Saskatchewan has an estimated part-time residential population of between 1,000 and 1,250 attributable to the Oil & Gas/Industrial Heartland.
- The City of Fort Saskatchewan currently has approximately 1.19 million sq. ft. of total retail space with a vacancy of only 3.4%.
- Current estimates for demand suggest that the City is marginally over-retailed, however this is attributable to specific categories such as Personal Services, Specialty Retail and Limited Service Restaurants.
- The majority of retail categories in the City are largely in balance with current demand estimates.
- Future growth forecasts suggest the City could conservatively accommodate an additional 220,000 sq. ft. of new retail space by 2026.
- Competitive influences from neighbouring areas to the south will continue, particularly as new nodes such as Emerald Hills and Manning Town Centre effectively restrict Fort Saskatchewan's retail trade area from penetrating south.

- Fort Saskatchewan's retail inventory is well-positioned to provide community scale appeal for day-to-day necessities as well as casual essential comparison items such as everyday Apparel, Toys & Hobbies and Food & Beverage.

- Fort Saskatchewan has a net sales inflow of $45 million (Y/E 2016 estimate), comprising predominantly convenience categories.

- Fort Saskatchewan does a very good job of retaining and attracting Convenience Spending from its Trade Area with a net inflow of $58 million.

- Fort Saskatchewan garners strong inflow from Limited Service Restaurants ($18.4 million).

- Fort Saskatchewan's Total Trade Area penetration of the Full-Service Restaurant category could be stronger (currently at an estimated 52%).

- Fort Saskatchewan's major leakage occurs in Automotive/RV Dealers ($45.7million) Clothing & Footwear ($15.1 million) and Home Furnishings ($24.5 million).

- Consumer Survey Respondents would like to see more Full-Service Restaurants, Grocery and Clothing & Footwear at value to mid price points. An enhanced offering in these categories could lead to further retention of sales dollars in Fort Saskatchewan as well as more inflow from surrounding towns and counties.

Since 2014, when the original study was undertaken, Fort Saskatchewan has been reslient in maintaingn moderate retail growth. The population of the Total Trade Area, driven by growth in the city of Fort Saskatchewan has continued.

The temporary workforce or "shadow population" has declined from previous estimates of 2,500 plus to approximately 1,250 or about half or less.

As with other markets affected by a drop in oil prices, consumer confidence and retail-specific spendin has slowed, but this is expected to slowly rebound over the next few years.

A lower spending, within the Trade Area has also resulted in an esstimated and corresponding decline in retail sales productivity for retailers in Fort Saskatchewan.

Their has however been an introduction of new tenants in the market since 2014, with notable brands such as Canadian Brewhouse, Shoppers Drug Mart, Wendy's, Montana's and Kal Tire, as well as a second Shoppers Drug Mart.

The majority of new retail businesses in fort Saskatchewan over the past two (2) years have however been local, which is a very positive sign of strength and resilience.

As the City grows, even in the face of weaker consumer confidence and spending, it is ever moer important that the City recognize and prioritize retention and attraction for Downtown businesses.

# 7

Although residual demand continues to be in the negative (~ 420,000 sf), the recent economic challenges have shown a greater desire for convenience spending to be more localized. This has been manifest in less outflow overall than in 2014, particularly for convenience categories where Trade Area residents are staying closer to home.

Alternatively, bigger ticket items such as Auto and Recreational Vehicles as well as Comparison categories (or Department Store Type Merchandise DSTM) still exhibit outflow dollars from the community and this will likely be the case over the next 5-10 years.

Convenience and Food & Beverage categories will continue to be strong as will Specialty Retail, Auto Parts and Personal Services, or those categories for whom distance and time are a factor.

*CONSIDERATIONS*

- Ensure that retail growth does not come at the expense of the Downtown.
- Promote the infill of existing and developing retail nodes as a way of cultivating critical mass and critical mix.
- Prioritize key target categories and tenants that can benefit from the sales inflow as well as curbing some outflow.
- Avoid trying to compete with the major retail nodes at Emerald Hills and Manning Town Centre, but rather solidify the City's role as a strong service centre as the closest urban centre to Alberta's Industrial Heartland.
- Market the City's offering of shops and services to the identified north, northwest and eastern parts of the trade area to attract and retain more of their spending.
- Over the next decade, the City of Fort Saskatchewan should strive to increase its market share of retail spending from City Residents from an estimated 50% today to 60% by 2026. An increase of 10% could result in approximately upwards of $65 million in additional sales retained in the city.

## REPRESENTATIVE TARGET TENANTS

# 7

## REPRESENTATIVE TARGET TENANTS


We Welcome
YOU
explore
DOWNTOWN
FORT SASKATCHEWAN
Photo credit: Cushing Terrell Architecture Inc. 2014

RETAIL
Market & Gap Analysis

City of Fort Saskatchewan

# APPENDICES

CUSHING TERRELL ARCHITECTURE INC.

keyfax market research



CITY OF FORT SASKATCHEWAN

| Retail Business Name | Retail Node | Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST | General Retail Category | NAICS | Est. Area (SF) | Est. Sales Productivity Estimate Based on Building, Location, Tenant etc. | Est. Annual Sales Based on Building, Location, Tenant etc. |
|---|---|---|---|---|---|---|---|
| Century 21 Realty | 101st/Hwy 15 | CENTRAL | Personal Services | 531212 | 1,165 | $300 | $349,605 |
| Dollarama | 101st/Hwy 15 | CENTRAL | Specialty Retail | 45299 | 10,123 | $215 | $2,176,370 |
| Fountain Tire | 101st/Hwy 15 | CENTRAL | Auto Parts & Accessories | 44132 | 13,411 | $350 | $4,693,955 |
| Gas Bar Convenience | 101st/Hwy 15 | CENTRAL | Grocery & Specialty Foods | 44719 | 582 | $550 | $320,238 |
| Jiffy Lube | 101st/Hwy 15 | CENTRAL | Auto Parts & Accessories | 811199 | 1,375 | $350 | $481,355 |
| KFC Taco Bell | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 722512 | 1,922 | $375 | $720,694 |
| No Frills | 101st/Hwy 15 | CENTRAL | Grocery & Specialty Foods | 44511 | 34,383 | $550 | $18,910,375 |
| Pizza Hut | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 722512 | 2,474 | $350 | $865,725 |
| Quiznos Sub | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 722512 | 1,165 | $500 | $582,675 |
| Real Canadian Liquor Store | 101st/Hwy 15 | CENTRAL | Alcohol & Tobacco | 44531 | 5,485 | $594 | $3,256,748 |
| Tim Hortons | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 722512 | 2,320 | $625 | $1,449,781 |
| Winners Way Source for Sports | 101st/Hwy 15 | CENTRAL | Sporting Goods & Outdoor Recreation | 45111 | 9,976 | $281 | $2,805,638 |
| Z Chiropractic | 101st/Hwy 15 | CENTRAL | Personal Services | 621310 | 1,165 | $300 | $349,605 |
| Bank of Montreal | Cornerstone | CENTRAL | Personal Services | 522111 | 5,987 | $300 | $1,795,965 |
| Boston Pizza | Cornerstone | CENTRAL | Full Service F&B | 722511 | 6,799 | $750 | $5,099,363 |
| Canadian Tire | Cornerstone | CENTRAL | **Auto Parts & Accessories** | 45299 | 15,000 | $350 | $5,250,000 |
| Canadian Tire | Cornerstone | CENTRAL | Books & Multi-Media | | 0 | $300 | $0 |
| Canadian Tire | Cornerstone | CENTRAL | Clothing & Apparel | | 1,000 | $250 | $250,000 |
| Canadian Tire | Cornerstone | CENTRAL | Footwear | | 500 | $275 | $137,500 |
| Canadian Tire | Cornerstone | CENTRAL | Grocery & Specialty Foods | | 500 | $550 | $275,000 |
| Canadian Tire | Cornerstone | CENTRAL | Health & Beauty | | 0 | $425 | $0 |
| Canadian Tire | Cornerstone | CENTRAL | Home Electronics & Appliances | | 2,000 | $625 | $1,250,000 |
| Canadian Tire | Cornerstone | CENTRAL | Home Furnishings & Accessories | | 5,000 | $235 | $1,175,000 |
| Canadian Tire | Cornerstone | CENTRAL | Home Improvement & Gardening | | 15,000 | $275 | $4,125,000 |
| Canadian Tire | Cornerstone | CENTRAL | Jewelry & Accessories | | 0 | $625 | $0 |
| Canadian Tire | Cornerstone | CENTRAL | Limited Service F&B | | 0 | $500 | $0 |
| Canadian Tire | Cornerstone | CENTRAL | Personal Services | | 0 | $300 | $0 |
| Canadian Tire | Cornerstone | CENTRAL | Pharmacy | | 0 | $600 | $0 |
| Canadian Tire | Cornerstone | CENTRAL | Specialty Retail | | 5,000 | $215 | $1,075,000 |
| Canadian Tire | Cornerstone | CENTRAL | Sporting Goods & Outdoor Recreation | | 8,000 | $225 | $1,800,000 |
| Canadian Tire | Cornerstone | CENTRAL | Toys & Hobbies | | 8,000 | $225 | $1,800,000 |
| Cornerstone Dental Centre | Cornerstone | | **Occupied Traditional Retail** | 621210 | | $0 | $0 |
| Edo Grill Sushi | Cornerstone | CENTRAL | Limited Service F&B | 722511 | 1,514 | $625 | $946,156 |
| Extreme Pita | Cornerstone | CENTRAL | Limited Service F&B | 722512 | 1,055 | $625 | $659,281 |
| Fatburger | Cornerstone | CENTRAL | Full Service F&B | 722512 | 1,724 | $350 | $603,330 |
| FYi doctors | Cornerstone | CENTRAL | Personal Services | 621320 | 3,169 | $300 | $950,640 |
| Get Real Natural Health Food | Cornerstone | CENTRAL | Grocery & Specialty Foods | 44529 | 1,024 | $413 | $422,503 |
| Lammle's Western Wear | Cornerstone | CENTRAL | Clothing & Apparel | 44814 | 4,365 | $250 | $1,091,188 |
| Liquor Barn | Cornerstone | CENTRAL | Alcohol & Tobacco | 44531 | 2,723 | $594 | $1,616,514 |
| M & M Meat Shop | Cornerstone | CENTRAL | Grocery & Specialty Foods | 44521 | 1,024 | $688 | $704,172 |
| Mark's | Cornerstone | CENTRAL | Clothing & Apparel | 44814 | 5,570 | $313 | $1,740,641 |
| Papa John's Pizza | Cornerstone | CENTRAL | Limited Service F&B | 722512 | 1,298 | $500 | $648,975 |
| Payless Shoe Source | Cornerstone | CENTRAL | Footwear | 44821 | 1,629 | $275 | $448,099 |
| PetValu | Cornerstone | CENTRAL | Specialty Retail | 453910 | 2,717 | $215 | $584,069 |
| Reitman's | Cornerstone | CENTRAL | Clothing & Apparel | 44812 | 7,818 | $250 | $1,954,575 |
| Safeway | Cornerstone | CENTRAL | Grocery & Specialty Foods | 44511 | 42,660 | $688 | $29,328,613 |
| Staples | Cornerstone | CENTRAL | Specialty Retail | 45321 | 12,862 | $215 | $2,765,373 |
| Subway | Cornerstone | CENTRAL | Limited Service F&B | 722512 | 1,024 | $625 | $640,156 |
| Supercuts | Cornerstone | CENTRAL | Health & Beauty | 812116 | 1,024 | $531 | $544,133 |
| Telus | Cornerstone | CENTRAL | Specialty Retail | 532210 | 1,024 | $269 | $275,267 |
| The Brick | Cornerstone | CENTRAL | Home Furnishings & Accessories | 44211 | 10,966 | $235 | $2,576,975 |
| The Brick Mattresses | Cornerstone | CENTRAL | Home Furnishings & Accessories | 44211 | 2,791 | $235 | $655,979 |
| The Source | Cornerstone | CENTRAL | Home Electronics & Appliances | 44314 | 3,455 | $625 | $2,159,531 |
| VO's Nails | Cornerstone | CENTRAL | Health & Beauty | 812115 | 1,024 | $425 | $435,306 |
| WalMart | Cornerstone | CENTRAL | Auto Parts & Accessories | 45299 | 8,000 | $350 | $2,800,000 |
| WalMart | Cornerstone | CENTRAL | Books & Multi-Media | | 1,000 | $300 | $300,000 |
| WalMart | Cornerstone | CENTRAL | Clothing & Apparel | | 40,000 | $250 | $10,000,000 |
| WalMart | Cornerstone | CENTRAL | Footwear | | 2,000 | $275 | $550,000 |
| WalMart | Cornerstone | CENTRAL | Grocery & Specialty Foods | | 40,000 | $550 | $22,000,000 |
| WalMart | Cornerstone | CENTRAL | Health & Beauty | | 4,000 | $425 | $1,700,000 |
| WalMart | Cornerstone | CENTRAL | Home Electronics & Appliances | | 10,000 | $625 | $6,250,000 |
| WalMart | Cornerstone | CENTRAL | Home Furnishings & Accessories | | 10,000 | $235 | $2,350,000 |
| WalMart | Cornerstone | CENTRAL | Home Improvement & Gardening | | 8,000 | $275 | $2,200,000 |
| WalMart | Cornerstone | CENTRAL | Jewelry & Accessories | | 2,000 | $625 | $1,250,000 |
| WalMart | Cornerstone | CENTRAL | Limited Service F&B | | 2,000 | $500 | $1,000,000 |
| WalMart | Cornerstone | CENTRAL | Personal Services | | 1,000 | $300 | $300,000 |
| WalMart | Cornerstone | CENTRAL | Pharmacy | | 4,000 | $600 | $2,400,000 |
| WalMart | Cornerstone | CENTRAL | Specialty Retail | | 10,000 | $215 | $2,150,000 |
| WalMart | Cornerstone | CENTRAL | Sporting Goods & Outdoor Recreation | | 4,000 | $225 | $900,000 |
| WalMart | Cornerstone | CENTRAL | Toys & Hobbies | | 4,000 | $225 | $900,000 |
| Warehouse One | Cornerstone | CENTRAL | Clothing & Apparel | 448140 | 2,799 | $250 | $699,763 |
| Your Dollar Store With More | Cornerstone | CENTRAL | Specialty Retail | 45299 | 3,580 | $215 | $769,743 |

# A APPENDIX | RETAIL INVENTORY

Shaded area reflects changes in retail inventory since last study was completed in December 2014/January 2015

| Retail Business Name | Retail Node | Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST | General Retail Category | NAICS | Est. Area (SF) | Est. Sales Productivity Estimate Based on Building, Location, Tenant etc. | Est. Annual Sales Based on Building, Location, Tenant etc. |
|---|---|---|---|---|---|---|---|
| ATCO Gas | Eastgate | | **Occupied Traditional Retail** | | | $0 | $0 |
| Budget Rental Car | Eastgate | CENTRAL | Auto/RV/Motorsports Dealership | 532111 | 2,107 | $319 | $671,654 |
| Commercial Solutions, Inc | Eastgate | | **Occupied Traditional Retail** | | | $0 | $0 |
| Crystal Chrysler Dodge Ram | Eastgate | CENTRAL | Auto/RV/Motorsports Dealership | 44111 | 13,729 | $425 | $5,834,910 |
| Dance at Brijets | Eastgate | CENTRAL | Entertainment & Leisure | 611610 | 4,618 | $150 | $692,708 |
| Fort Technology Group | Eastgate | | **Occupied Traditional Retail** | | | $0 | $0 |
| Home Hardware Building Centre | Eastgate | CENTRAL | Home Improvement & Gardening | 44411 | 17,175 | $275 | $4,723,153 |
| Modo Mio Italian Restaurant | Eastgate | CENTRAL | Full Service F&B | 722511 | 1,937 | $263 | $508,502 |
| PartSource Auto Parts | Eastgate | CENTRAL | Auto Parts & Accessories | 44131 | 3,835 | $350 | $1,342,320 |
| Red-E Carpets | Eastgate | CENTRAL | Home Furnishings & Accessories | 442210 | 2,176 | $176 | $383,520 |
| Sears | Eastgate | CENTRAL | Home Furnishings & Accessories | 45211 | 6,142 | $176 | $1,082,545 |
| Unique Financial Services | Eastgate | CENTRAL | Personal Services | 523930 | 2,054 | $300 | $616,080 |
| Vacant | Eastgate | CENTRAL | VACANT | | 1,867 | $0 | $0 |
| A & W | South Fort | CENTRAL | Limited Service F&B | 722512 | 2,162 | $625 | $1,351,500 |
| Fas Gas Mart | South Fort | CENTRAL | Grocery & Specialty Foods | 447110 | 500 | $413 | $206,250 |
| Humpty's Family Restaurant | South Fort | CENTRAL | Full Service F&B | 722511 | 4,127 | $263 | $1,083,272 |
| Maxx Physio Therapy | South Fort | | **Occupied Traditional Retail** | | | $0 | $0 |
| McDonalds | South Fort | CENTRAL | Limited Service F&B | 722512 | 5,432 | $625 | $3,394,688 |
| Money Mart | South Fort | CENTRAL | Personal Services | 522291 | 1,864 | $225 | $419,411 |
| Roustabout's Restaurant | South Fort | CENTRAL | Full Service F&B | 722511 | 5,562 | $263 | $1,460,130 |
| South Fort Chevrolet | South Fort | CENTRAL | Auto/RV/Motorsports Dealership | 44111 | 15,406 | $425 | $6,547,656 |
| Spirits on 101 Liquor | South Fort | CENTRAL | Alcohol & Tobacco | 44531 | 1,960 | $356 | $698,286 |
| Subway | South Fort | CENTRAL | Limited Service F&B | 722512 | 1,153 | $500 | $576,300 |
| Yakimet's Pharmacy | South Fort | CENTRAL | Pharmacy | 44611 | 3,047 | $450 | $1,371,263 |
| Cann/Amm Occupational Therapy | Southpointe | CENTRAL | Personal Services | 621340 | 749 | $225 | $168,491 |
| Co-op Gas & Convenience Store | Southpointe | CENTRAL | Grocery & Specialty Foods | | 2,400 | $413 | $990,000 |
| Domino's Pizza | Southpointe | CENTRAL | Limited Service F&B | 722512 | 1,079 | $375 | $404,494 |
| DynaLIFE Laboratory Services | Southpointe | CENTRAL | Personal Services | 621510 | 3,483 | $225 | $783,743 |
| Fort Physical Therapy | Southpointe | | **Occupied Traditional Retail** | 621340 | | $0 | $0 |
| H & R Block | Southpointe | CENTRAL | Personal Services | 541212 | 1,200 | $225 | $270,000 |
| Home Depot | Southpointe | CENTRAL | Home Improvement & Gardening | 44411 | 75,504 | $344 | $25,954,431 |
| Kal Tire | Southpointe | CENTRAL | Auto Parts & Accessories | | 7,400 | $350 | $2,590,000 |
| Medical Clinic | Southpointe | CENTRAL | Personal Services | 621499 | 3,614 | $300 | $1,084,260 |
| Medical Imaging Consultants | Southpointe | CENTRAL | Personal Services | 621510 | 5,876 | $300 | $1,762,815 |
| Mucho Burrito | Southpointe | CENTRAL | Limited Service F&B | 722512 | 1,796 | $625 | $1,122,531 |
| Opa Greek | Southpointe | CENTRAL | Limited Service F&B | 722512 | 1,976 | $625 | $1,235,156 |
| Original Joe's | Southpointe | CENTRAL | Full Service F&B | 722511 | 2,041 | $438 | $892,872 |
| Q Nails | Southpointe | CENTRAL | Health & Beauty | 812115 | 1,119 | $425 | $475,766 |
| Rogers | Southpointe | CENTRAL | Personal Services | 532210 | 1,080 | $375 | $405,131 |
| Shoppers Drug Mart | Southpointe | CENTRAL | Pharmacy | 44611 | 16,448 | $750 | $12,335,625 |
| Solo Liquor | Southpointe | CENTRAL | Alcohol & Tobacco | 44531 | 962 | $594 | $571,306 |
| South Fort Dental | Southpointe | | **Occupied Traditional Retail** | | | $0 | $0 |
| Starbucks Coffee | Southpointe | CENTRAL | Limited Service F&B | 722512 | 1,779 | $625 | $1,111,906 |
| Wok Box | Southpointe | CENTRAL | Limited Service F&B | 722512 | 1,796 | $500 | $898,025 |

| Retail Business Name | Retail Node | Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST | General Retail Category | NAICS | Est. Area (SF) | Est. Sales Productivity Estimate Based on Building, Location, Tenant etc. | Est. Annual Sales Based on Building, Location, Tenant etc. |
|---|---|---|---|---|---|---|---|
| 99th Avenue Liquor Store | Station Square | DOWNTOWN | Alcohol & Tobacco | 44531 | 1,837 | $475 | $872,504 |
| ATB Financial | Station Square | DOWNTOWN | Personal Services | 522111 | 5,820 | $375 | $2,182,481 |
| Co-op | Station Square | DOWNTOWN | Grocery & Specialty Foods | 44511 | 40,480 | $550 | $22,263,753 |
| Dairy Queen | Station Square | DOWNTOWN | Limited Service F&B | 722512 | 2,111 | $500 | $1,055,275 |
| Faces Spa and Salon | Station Square | DOWNTOWN | Health & Beauty | 812115 | 2,714 | $319 | $865,103 |
| Fort Cinemas | Station Square | DOWNTOWN | Entertainment & Leisure | 51213 | 7,818 | $150 | $1,172,745 |
| Fort Saskatchewan Dental Clinic | Station Square | | **Occupied Traditional Retail** | | | $0 | $0 |
| Givens LLP | Station Square | | **Occupied Traditional Retail** | | | $0 | $0 |
| Hot & Fresh Pizza | Station Square | DOWNTOWN | Limited Service F&B | 722511 | 2,867 | $375 | $1,075,144 |
| K Lee Boutique | Station Square | DOWNTOWN | Health & Beauty | 812115 | 1,498 | $319 | $477,392 |
| Positivity Preschool | Station Square | DOWNTOWN | Personal Services | 624410 | 2,343 | $225 | $527,085 |
| Robin Hood Learning Centre | Station Square | DOWNTOWN | Personal Services | 624410 | 2,660 | $300 | $797,895 |
| Snap Fitness | Station Square | DOWNTOWN | Entertainment & Leisure | 71394 | 8,519 | $250 | $2,129,675 |
| TD Canada Trust | Station Square | DOWNTOWN | Personal Services | 522111 | 4,848 | $300 | $1,454,265 |
| Vacant Restaurant | Station Square | DOWNTOWN | VACANT | 722511 | 1,275 | $0 | $0 |
| 7-Eleven | Downtown | DOWNTOWN | Grocery & Specialty Foods | 445120 | 1,754 | $550 | $964,920 |
| A Touch of Wellness | Downtown | DOWNTOWN | Specialty Retail | 44529 | 346 | $161 | $55,784 |
| Advance Driving School | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Alberta Government | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Ann's Day Care | Downtown | DOWNTOWN | Personal Services | 624410 | 3,245 | $225 | $730,193 |
| Apropos Therapy Centre | Downtown | | **Occupied Traditional Retail** | 621340 | | $0 | $0 |
| A-Win Insurance | Downtown | DOWNTOWN | Personal Services | 524210 | 1,040 | $300 | $312,120 |
| Barber Shop | Downtown | DOWNTOWN | Health & Beauty | 812114 | 945 | $319 | $301,283 |
| Blondes Brunettes & Redheads Salon | Downtown | DOWNTOWN | Health & Beauty | 812115 | 2,169 | $319 | $691,433 |
| CA Insurance Plans West | Downtown | DOWNTOWN | Personal Services | 524210 | 1,114 | $300 | $334,050 |
| Canuck Plumbing & Heating | Downtown | DOWNTOWN | Home Improvement & Gardening | 416120 | 3,872 | $625 | $2,419,844 |
| Caprice Lounge | Downtown | DOWNTOWN | Full Service F&B | 72241 | 2,575 | $338 | $868,944 |
| Career & Employment Resource Centre | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Chinese Restaurant (Soon to be relocating) | Downtown | DOWNTOWN | Full Service F&B | 722511 | 2,603 | $263 | $683,209 |
| Chiropractic Clinic Laser Therapy | Downtown | | **Occupied Traditional Retail** | 621310 | | $0 | $0 |
| Church Tattoos | Downtown | DOWNTOWN | Personal Services | | 1,300 | $225 | $292,500 |
| CIBC | Downtown | DOWNTOWN | Personal Services | 522111 | 4,474 | $300 | $1,342,065 |
| Cinfully Pure Water | Downtown | DOWNTOWN | Specialty Retail | 44529 | 813 | $161 | $131,169 |
| CnH Appliances | Downtown | DOWNTOWN | Home Electronics & Appliances | 44314 | 2,962 | $469 | $1,388,555 |
| Cover to Cover Books | Downtown | DOWNTOWN | Books & Multi-Media | 451310 | 1,403 | $225 | $315,563 |
| Crystal Glass | Downtown | DOWNTOWN | Auto Parts & Accessories | 441310 | 2,848 | $263 | $747,469 |
| Daddeos Smoke Shop | Downtown | DOWNTOWN | Alcohol & Tobacco | 413310 | 759 | $356 | $270,412 |
| Daisy a Day | Downtown | DOWNTOWN | Specialty Retail | 453110 | 949 | $215 | $204,132 |
| Dance Moves | Downtown | DOWNTOWN | Entertainment & Leisure | 611610 | 3,969 | $150 | $595,298 |
| Dance Studio | Downtown | DOWNTOWN | Entertainment & Leisure | 611610 | 890 | $150 | $133,493 |
| Day Care | Downtown | DOWNTOWN | Personal Services | 624410 | 3,116 | $225 | $701,123 |
| Dental Clinic | Downtown | | **Occupied Traditional Retail** | 621210 | | $0 | $0 |
| Dental Clinic | Downtown | | **Occupied Traditional Retail** | 621210 | | $0 | $0 |
| Denture Care Centre | Downtown | | **Occupied Traditional Retail** | 621210 | | $0 | $0 |
| Depot/Chamber of Commerce | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Drayden Insurance | Downtown | DOWNTOWN | Personal Services | 524210 | 2,684 | $300 | $805,290 |
| Driving Force Driver Training | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Edward Jones Investments | Downtown | DOWNTOWN | Personal Services | 522111 | 1,939 | $225 | $436,241 |
| Enhance It Embroidery | Downtown | DOWNTOWN | Specialty Retail | 313310 | 1,156 | $161 | $186,405 |
| Esso C Store - Tim Hortons | Downtown | DOWNTOWN | Grocery & Specialty Foods | 44711 | 1,265 | $550 | $695,640 |
| European Touch Message & Wellness | Downtown | DOWNTOWN | Personal Services | 45322 | 1,336 | $225 | $300,645 |
| Eye Masters/T's Nails | Downtown | DOWNTOWN | Personal Services | 812115 | 703 | $225 | $158,164 |
| Fake and Bake Tanning Salon | Downtown | DOWNTOWN | Personal Services | 812115 | 972 | $225 | $218,599 |
| Flo's Beauty Salon | Downtown | DOWNTOWN | Health & Beauty | 812115 | 1,093 | $319 | $348,426 |
| Fort Bottle Depot | Downtown | DOWNTOWN | Specialty Retail | 418190 | 4,367 | $161 | $704,227 |
| Fort Chiropractic Centre | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Fort Cleaners and Coin Laudry | Downtown | DOWNTOWN | Personal Services | 812310 | 2,569 | $225 | $577,958 |
| Fort Family Restaurant | Downtown | DOWNTOWN | Full Service F&B | | 1,271 | $350 | $444,850 |
| Fort Gasland | Downtown | DOWNTOWN | Auto/RV/Motorsports Dealership | 441310 | 2,028 | $319 | $646,457 |
| Fort Lanes | Downtown | DOWNTOWN | Entertainment & Leisure | 71395 | 6,805 | $150 | $1,020,765 |
| Fort Saskatchewan Newspaper | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Fort Saskatchewan Veterinary Clinic | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Fort Shoe Repair | Downtown | DOWNTOWN | Footwear | 811430 | 611 | $206 | $126,050 |

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| Retail Business Name | Retail Node | Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST | General Retail Category | NAICS | Est. Area (SF) | Est. Sales Productivity Estimate Based on Building, Location, Tenant etc. | Est. Annual Sales Based on Building, Location, Tenant etc. |
|---|---|---|---|---|---|---|---|
| Giant Tiger | Downtown | DOWNTOWN | Clothing & Apparel | 45299 | 17,375 | $188 | $3,257,784 |
| Glenns Music Store | Downtown | DOWNTOWN | Specialty Retail | 45114 | 476 | $225 | $107,100 |
| Gold and Diamond Boutique | Downtown | DOWNTOWN | Jewelry & Accessories | 44831 | 1,172 | $625 | $732,594 |
| Gott the Gift Music Studio | Downtown | DOWNTOWN | Specialty Retail | 45114 | 1,940 | $161 | $312,777 |
| Grammie's Coffee Shop | Downtown | DOWNTOWN | Limited Service F&B | 722512 | 1,182 | $375 | $443,381 |
| Greenland Day Care | Downtown | DOWNTOWN | Personal Services | 624410 | 3,465 | $225 | $779,535 |
| Greenwood Medical Clinic | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Growers Direct Flowers | Downtown | DOWNTOWN | Specialty Retail | 45311 | 1,906 | $161 | $307,294 |
| Hair Do Salon | Downtown | DOWNTOWN | Health & Beauty | 812115 | 677 | $319 | $215,666 |
| Hair Junky's | Downtown | DOWNTOWN | Health & Beauty | 812115 | 724 | $319 | $230,839 |
| Hanabi | Downtown | DOWNTOWN | Full Service F&B | | 2,400 | $263 | $630,000 |
| Home Team Advantage Promo Printing | Downtown | DOWNTOWN | Specialty Retail | 323113 | 1,873 | $215 | $402,598 |
| Husky Food Store | Downtown | DOWNTOWN | Grocery & Specialty Foods | 44711 | 3,628 | $413 | $1,496,468 |
| Imperial Appliances | Downtown | DOWNTOWN | Home Electronics & Appliances | 44314 | 1,327 | $469 | $621,961 |
| Investment Planning Counsel Corporation | Downtown | | **Occupied TradItional Retail** | | | $0 | $0 |
| Jacque Fenske MLA | Downtown | | **Occupied TradItional Retail** | | | $0 | $0 |
| Kebab | Downtown | DOWNTOWN | Limited Service F&B | | 1,479 | $375 | $554,625 |
| Kelly & Thomas Accountants | Downtown | DOWNTOWN | Personal Services | 541212 | 3,118 | $225 | $701,505 |
| Kjenner Financial Services | Downtown | DOWNTOWN | Personal Services | 541212 | 986 | $225 | $221,850 |
| Kountry Knits | Downtown | DOWNTOWN | Specialty Retail | 313310 | 1,765 | $161 | $284,542 |
| La Perla Hair Studio | Downtown | DOWNTOWN | Health & Beauty | 812115 | 1,163 | $319 | $370,643 |
| Legendary Barber Shop | Downtown | DOWNTOWN | Health & Beauty | | 400 | $319 | $127,500 |
| Liberty Tax | Downtown | DOWNTOWN | Personal Services | 541212 | 2,015 | $225 | $453,263 |
| Liquor 4 You | Downtown | DOWNTOWN | Alcohol & Tobacco | 44531 | 1,559 | $475 | $740,478 |
| Little Rascals Trading Post | Downtown | DOWNTOWN | Toys & Hobbies | 451120 | 1,238 | $169 | $208,988 |
| Madison's Dog Grooming | Downtown | DOWNTOWN | Personal Services | 812910 | 654 | $225 | $147,071 |
| Mike's Hair | Downtown | DOWNTOWN | Health & Beauty | 812116 | 630 | $319 | $200,765 |
| Millers Ice Cream | Downtown | DOWNTOWN | Limited Service F&B | 722512 | 224 | $375 | $84,150 |
| Morgan's Printing | Downtown | DOWNTOWN | Specialty Retail | 313113 | 2,286 | $161 | $368,561 |
| Napa Auto Parts | Downtown | DOWNTOWN | Auto Parts & Accessories | 44131 | 5,274 | $350 | $1,845,988 |
| New 2 You | Downtown | DOWNTOWN | Clothing & Apparel | | 1,600 | $188 | $300,000 |
| Our Kitchen Table Restaurant | Downtown | DOWNTOWN | Full Service F&B | 722511 | 2,783 | $263 | $730,511 |
| Parent Link Centre | Downtown | | **Occupied TradItional Retail** | | | $0 | $0 |
| Paul Hotke CPA | Downtown | DOWNTOWN | Personal Services | 541212 | 1,390 | $225 | $312,694 |
| Pawn Shop | Downtown | DOWNTOWN | Specialty Retail | 522299 | 1,219 | $161 | $196,548 |
| Perry's Pizza and Pasta | Downtown | DOWNTOWN | Limited Service F&B | 722512 | 911 | $375 | $341,700 |
| Pinder Chiropractic | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Pot's Restaurant | Downtown | DOWNTOWN | Full Service F&B | 722511 | 2,997 | $263 | $786,739 |
| Precision Hearing | Downtown | DOWNTOWN | Personal Services | 621499 | 903 | $225 | $203,108 |
| Ravenous FX | Downtown | DOWNTOWN | Specialty Retail | 45310 | 433 | $161 | $69,765 |
| RBC | Downtown | DOWNTOWN | Personal Services | 522111 | 5,901 | $300 | $1,770,210 |
| Realty Executives | Downtown | DOWNTOWN | Personal Services | 531212 | 1,482 | $225 | $333,540 |
| Remax Real Estate | Downtown | DOWNTOWN | Personal Services | | 1,800 | $225 | $405,000 |
| Richard's Donair and Sub | Downtown | DOWNTOWN | Limited Service F&B | 722512 | 1,170 | $375 | $438,919 |
| Roadready Auto Service | Downtown | DOWNTOWN | Auto Parts & Accessories | 441310 | 2,071 | $263 | $543,756 |
| Roland's Jewelry | Downtown | DOWNTOWN | Jewelry & Accessories | 44831 | 2,847 | $781 | $2,223,945 |
| Scotiabank | Downtown | DOWNTOWN | Personal Services | 522111 | 4,706 | $300 | $1,411,680 |
| Serenety Funeral Home | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Servus | Downtown | DOWNTOWN | Personal Services | 522111 | 3,543 | $300 | $1,062,840 |
| Sharper Image | Downtown | DOWNTOWN | Specialty Retail | 812116 | 1,176 | $161 | $189,557 |
| Silky Nails | Downtown | DOWNTOWN | Health & Beauty | 812115 | 955 | $319 | $304,263 |
| Simply Stunning Hair & Makeup | Downtown | DOWNTOWN | Health & Beauty | | 1,900 | $319 | $605,625 |
| Skate and Snowboard Shop | Downtown | DOWNTOWN | Sporting Goods & Outdoor Recreation | 451112 | 805 | $225 | $181,114 |
| Smilemakers Dental Centre | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Smith Insurance/NE Capital Industrial Assc (Up) | Downtown | DOWNTOWN | Personal Services | 524299 | 3,222 | $225 | $725,029 |
| Soulitude Salon & Spa | Downtown | DOWNTOWN | Health & Beauty | 812115 | 1,292 | $319 | $411,825 |
| Spotlight Gallery | Downtown | DOWNTOWN | Specialty Retail | 453920 | 1,494 | $161 | $240,956 |
| Strathcona Denture Clinic | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Street Kings | Downtown | DOWNTOWN | Clothing & Apparel | 448199 | 964 | $188 | $180,731 |
| Sub Joint | Downtown | DOWNTOWN | Limited Service F&B | 722512 | 697 | $375 | $261,375 |
| Sunrae Massage & Wellness | Downtown | DOWNTOWN | Personal Services | | 1,000 | $225 | $225,000 |
| Switzer Financial Corporation | Downtown | DOWNTOWN | Personal Services | | 2,300 | $225 | $517,500 |



CITY OF FORT SASKATCHEWAN

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|---|---|---|---|---|---|---|---|
| Tattoo Studio | Downtown | DOWNTOWN | Personal Services | 812190 | 910 | $225 | $204,638 |
| The Art of Nails | Downtown | DOWNTOWN | Health & Beauty | 812115 | 717 | $319 | $228,671 |
| The Atlantic Kitchen Restaurant | Downtown | DOWNTOWN | Full Service F&B | 722511 | 1,873 | $263 | $491,768 |
| The Bear's Den | Downtown | DOWNTOWN | Full Service F&B | 72241 | 6,925 | $350 | $2,423,733 |
| The Blu Poppie | Downtown | DOWNTOWN | Specialty Retail | 453999 | 629 | $161 | $101,426 |
| The Cash Store | Downtown | DOWNTOWN | Personal Services | 522291 | 459 | $225 | $103,275 |
| The Cooperators M. Friel Agencies | Downtown | DOWNTOWN | Personal Services | 541212 | 2,712 | $225 | $610,279 |
| The Downtown Diner | Downtown | DOWNTOWN | Full Service F&B | 722511 | 1,084 | $438 | $474,141 |
| The Fort Barber Shop | Downtown | DOWNTOWN | Health & Beauty | 812114 | 692 | $319 | $220,543 |
| The Fort Gaming and Collectibles | Downtown | DOWNTOWN | Specialty Retail | | 1,400 | $161 | $225,750 |
| The Hair Corner | Downtown | DOWNTOWN | Health & Beauty | 812116 | 1,197 | $319 | $381,480 |
| This and That Photography | Downtown | DOWNTOWN | Specialty Retail | 541920 | 750 | $161 | $120,938 |
| Time For Taxes | Downtown | DOWNTOWN | Personal Services | 541212 | 831 | $225 | $187,043 |
| Tire and Auto Repair | Downtown | DOWNTOWN | Auto Parts & Accessories | 44132 | 5,073 | $263 | $1,331,610 |
| Toadstool Music Studio | Downtown | DOWNTOWN | Personal Services | 611610 | 500 | $225 | $112,500 |
| Top Notch Games | Downtown | DOWNTOWN | Toys & Hobbies | 451120 | 698 | $169 | $117,762 |
| (CLOSED) Treasures Past and Present | Downtown | DOWNTOWN | VACANT | | 728 | $164 | $118,963 |
| Twice But Nice Thrift Store | Downtown | DOWNTOWN | Specialty Retail | 45299 | 4,140 | $161 | $667,494 |
| Unknown | Downtown | | **Occupied Traditional Retail** | | | $0 | $0 |
| Upscale Resale Consignment | Downtown | DOWNTOWN | Specialty Retail | 44819 | 1,205 | $161 | $194,355 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 972 | $0 | $0 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 637 | $0 | $0 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 600 | $0 | $0 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 420 | $0 | $0 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 10,861 | $0 | $0 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 2,586 | $0 | $0 |
| Vacant | Downtown | DOWNTOWN | VACANT | | 1,713 | $0 | $0 |
| Vacant Old Garage | Downtown | DOWNTOWN | VACANT | | 861 | $0 | $0 |
| Vacant Restaurant | Downtown | DOWNTOWN | VACANT | | 5,492 | $0 | $0 |
| Vacant Restaurant | Downtown | DOWNTOWN | VACANT | | 2,554 | $0 | $0 |
| Vacant (Telus relocated) | Downtown | DOWNTOWN | VACANT | | 2,287 | $0 | $0 |
| Vivid Vision Optometrist | Downtown | DOWNTOWN | Personal Services | | 1,249 | $225 | $280,946 |
| VN Express Restaurant | Downtown | DOWNTOWN | Full Service F&B | 722511 | 1,067 | $263 | $280,022 |
| Wash Land Coin Laundry | Downtown | DOWNTOWN | Personal Services | 812310 | 983 | $225 | $221,276 |
| Wild Rose Animal Clinic | Downtown | DOWNTOWN | Personal Services | 541940 | 904 | $225 | $203,490 |
| Winning Wines Plus | Downtown | DOWNTOWN | Alcohol & Tobacco | 44531 | 386 | $356 | $137,477 |
| Ace Liquor | Downtown - Fort Mall | DOWNTOWN | Alcohol & Tobacco | | 4,885 | $356 | $1,740,281 |
| Accounting Rescue (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Personal Services | 541212 | 250 | $225 | $56,250 |
| Benjamin Moore Paints | Downtown - Fort Mall | DOWNTOWN | Home Improvement & Gardening | | 1,368 | $161 | $220,590 |
| City Law Offices (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Personal Services | 541110 | 1,000 | $225 | $225,000 |
| Fort Gymnastics (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Entertainment & Leisure | 611620 | 7,500 | $150 | $1,125,000 |
| G & J Variety Store (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Specialty Retail | 45299 | 750 | $161 | $120,938 |
| Judy's Safety Co (before redevelopment) | Downtown - Fort Mall | | **Occupied Traditional Retail** | | | $0 | $0 |
| Jump FEC | Downtown - Fort Mall | DOWNTOWN | Entertainment & Leisure | | 13,000 | $150 | $1,950,000 |
| Koa Hot Yoga | Downtown - Fort Mall | DOWNTOWN | Personal Services | | 3,200 | $225 | $720,000 |
| Life Church (before redevelopment) | Downtown - Fort Mall | | **Occupied Traditional Retail** | | | $0 | $0 |
| Platinum Skin - Laser Lash Skincare | Downtown - Fort Mall | DOWNTOWN | Personal Services | | 1,409 | $225 | $317,025 |
| Romantic Secrets (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Specialty Retail | 48120 | 1,410 | $161 | $227,363 |
| Royal LePage Realty (before redevelopment) | Downtown - Fort Mall | | **Occupied Traditional Retail** | | | $0 | $0 |
| Sewyn Time (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Specialty Retail | 313310 | 750 | $161 | $120,938 |
| Shadified Salon & Spa | Downtown - Fort Mall | DOWNTOWN | Health & Beauty | | 1,600 | $319 | $510,000 |
| Specialty Gifts and Novelties (before redevelopment) | Downtown - Fort Mall | DOWNTOWN | Specialty Retail | 45299 | 750 | $161 | $120,938 |
| Two Sergeants Brew House | Downtown - Fort Mall | DOWNTOWN | Full Service F&B | | 2,492 | $263 | $654,150 |
| Work n' Play Clothing Company | Downtown - Fort Mall | DOWNTOWN | Clothing & Apparel | | 2,720 | $188 | $510,000 |

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|---|---|---|---|---|---|---|---|
| 7-Eleven | Riverpointe/Westview | WEST | Grocery & Specialty Foods | 44711 | 3,023 | $413 | $1,246,823 |
| Angie's Liquor | Riverpointe/Westview | WEST | Alcohol & Tobacco | 44531 | 1,546 | $475 | $734,421 |
| Buster's Pizza | Riverpointe/Westview | WEST | Limited Service F&B | 722511 | 1,584 | $500 | $792,200 |
| Curves | Riverpointe/Westview | WEST | Personal Services | 812190 | 1,527 | $300 | $458,235 |
| Gloria's Soup Spot | Riverpointe/Westview | WEST | Limited Service F&B | 722512 | 1,546 | $375 | $579,806 |
| Herbal One Weightloss | Riverpointe/Westview | WEST | Specialty Retail | 44529 | 1,527 | $161 | $246,301 |
| Johnny B Fitt | Riverpointe/Westview | WEST | Entertainment & Leisure | 713940 | 10,000 | $200 | $2,000,000 |
| Master Cleaner | Riverpointe/Westview | WEST | Specialty Retail | 812320 | 955 | $269 | $256,535 |
| Panago | Riverpointe/Westview | WEST | Limited Service F&B | 722512 | 1,299 | $500 | $649,400 |
| Pineview Liquor Store | Riverpointe/Westview | WEST | Alcohol & Tobacco | 44531 | 2,357 | $356 | $839,699 |
| Pure Yoga | Riverpointe/Westview | WEST | Personal Services | | 3,000 | $225 | $675,000 |
| Rainbow Restaurant | Riverpointe/Westview | WEST | Full Service F&B | 722511 | 3,818 | $263 | $1,002,278 |
| Retreat Salon and Spa | Riverpointe/Westview | WEST | Health & Beauty | 812115 | 2,524 | $319 | $804,413 |
| Shear Avenue | Riverpointe/Westview | WEST | Health & Beauty | 812115 | 1,527 | $319 | $486,875 |
| Shell Select C-Store | Riverpointe/Westview | WEST | Grocery & Specialty Foods | 44711 | 1,119 | $413 | $461,773 |
| Tantalize Tanning | Riverpointe/Westview | WEST | Personal Services | 812115 | 1,527 | $225 | $343,676 |
| The Medicine Shoppe | Riverpointe/Westview | WEST | Pharmacy | 446110 | 1,200 | $450 | $540,000 |
| Urban Dog Spaw | Riverpointe/Westview | WEST | Personal Services | 812910 | 1,238 | $225 | $278,651 |
| Vacant | Riverpointe/Westview | WEST | VACANT | | 2,565 | $0 | $0 |
| Vacant | Riverpointe/Westview | WEST | VACANT | | 1,446 | $0 | $0 |
| Vacant (MACS redevelopment) | Riverpointe/Westview | WEST | VACANT | | 2,471 | $0 | $0 |
| Vacant (formerly Movie Experts) | Riverpointe/Westview | WEST | VACANT | | 1,527 | $0 | $0 |
| Westview Medical Clinic | Riverpointe/Westview | | **Occupied Traditional Retail** | 621499 | | $0 | $0 |
| Willow Creek Homestore | Riverpointe/Westview | WEST | Home Furnishings & Accessories | 442298 | 1,226 | $176 | $216,030 |
| 7-Eleven | Dow Centre/Galloway Squa | SOUTH | Grocery & Specialty Foods | 447110 | 2,628 | $550 | $1,445,510 |
| Amato Gelato | Dow Centre/Galloway Squa | SOUTH | Limited Service F&B | 722512 | 675 | $375 | $253,088 |
| Body TX Massage | Dow Centre/Galloway Squa | SOUTH | Personal Services | 812190 | 1,075 | $225 | $241,931 |
| Booster Juice | Dow Centre/Galloway Squa | SOUTH | Limited Service F&B | 722512 | 255 | $500 | $127,500 |
| Eclipse Health and Fitness | Dow Centre/Galloway Squa | SOUTH | Health & Beauty | 71394 | 1,726 | $425 | $733,699 |
| Fabutan | Dow Centre/Galloway Squa | SOUTH | Personal Services | 812115 | 1,080 | $225 | $242,888 |
| G & G Café | Dow Centre/Galloway Squa | SOUTH | Limited Service F&B | 722512 | 255 | $375 | $95,625 |
| Kids Fort Day Care | Dow Centre/Galloway Squa | SOUTH | Personal Services | 624410 | 2,835 | $225 | $637,819 |
| Montana's BBQ & Bar | Dow Centre/Galloway Squa | SOUTH | Full Service F&B | | 3,000 | $350 | $1,050,000 |
| Quick Lube | Dow Centre/Galloway Squa | SOUTH | Auto Parts & Accessories | 811199 | 1,510 | $350 | $528,658 |
| ReMax | Dow Centre/Galloway Square | | **Occupied Traditional Retail** | | | $0 | $0 |
| Ricky's Restaurant | Dow Centre/Galloway Squa | SOUTH | Full Service F&B | 722511 | 5,095 | $438 | $2,229,019 |
| A-Bundance Bakery | Westpark | SOUTH | Limited Service F&B | 722512 | 1,697 | $500 | $848,300 |
| Cameron Dental | Westpark | SOUTH | Personal Services | | 2,000 | $225 | $450,000 |
| Econo Liquor | Westpark | SOUTH | Alcohol & Tobacco | 44531 | 2,278 | $475 | $1,082,050 |
| Flower Petals | Westpark | SOUTH | Specialty Retail | 45311 | 861 | $215 | $185,126 |
| Husky Market | Westpark | SOUTH | Grocery & Specialty Foods | 44711 | 2,153 | $550 | $1,184,178 |
| Mantra Salon Spa | Westpark | SOUTH | Health & Beauty | 812115 | 1,650 | $425 | $701,186 |
| Mary Browns | Westpark | SOUTH | Limited Service F&B | 722512 | 1,069 | $500 | $534,650 |
| Pizza Delight | Westpark | SOUTH | Full Service F&B | 722511 | 3,084 | $350 | $1,079,330 |
| Planet Beach | Westpark | SOUTH | Personal Services | 812115 | 971 | $300 | $291,300 |
| Rexall | Westpark | SOUTH | Pharmacy | 44611 | 9,732 | $450 | $4,379,243 |
| River City Cigar Co. | Westpark | SOUTH | Alcohol & Tobacco | 413310 | 983 | $356 | $350,051 |
| Sawmill | Westpark | SOUTH | Full Service F&B | 722511 | 5,389 | $263 | $1,414,613 |
| Second Cup Coffee | Westpark | SOUTH | Limited Service F&B | 722511 | 2,371 | $375 | $888,994 |
| Shell Food Mart | Westpark | SOUTH | Grocery & Specialty Foods | 44711 | 1,952 | $413 | $805,386 |
| Shoppers Drug Mart | Westpark | SOUTH | Pharmacy | | 16,000 | $750 | $12,000,000 |
| Telus | Westpark | SOUTH | Specialty Retail | 532210 | 1,069 | $161 | $172,425 |
| The Canadian Brewhouse | Westpark | SOUTH | Full Service F&B | | 6,000 | $438 | $2,625,000 |
| Tim Hortons | Westpark | SOUTH | Limited Service F&B | 722512 | 2,603 | $375 | $976,013 |
| Wendy's | Westpark | SOUTH | Limited Service F&B | | 2,900 | $625 | $1,812,500 |
| Westpark Beverage Liquor Store | Westpark | SOUTH | Alcohol & Tobacco | 44531 | 810 | $475 | $384,774 |
| Wok n'go | Westpark | SOUTH | Limited Service F&B | 722512 | 929 | $375 | $348,394 |
| Heartland Ford | Freestanding | SOUTH | Auto/RV/Motorsports Dealership | 441110 | 24,129 | $531 | $12,818,505 |
| | | | | | **1,194,049** | **$357** | **$426,723,624** |

# B APPENDIX | CONSUMER SURVEY OPEN-ENDED RETAILER RESPONSES

| Retailer / Tenant Type | Merchandise Category | Number of Responses |
|---|---|---|
| Costco | General Merchandise | 58 |
| Chapters/Indigo | Books & Multi-Media | 44 |
| Winners | Clothing & Apparel | 39 |
| The Keg | Full Service F&B | 33 |
| Wendys | Limited Service F&B | 30 |
| Earl's | Full Service F&B | 30 |
| Best Buy | Home Electronics & Appliances | 27 |
| Sport Chek | Sporting Goods & Outdoor Recreation | 25 |
| Montana's Cookhouse | Full Service F&B | 24 |
| Michael's | Specialty Retail | 21 |
| Future Shop | Home Electronics & Appliances | 21 |
| Real Canadian Superstore | General Merchandise | 20 |
| Cleo's | Clothing & Apparel | 19 |
| Moxie's | Full Service F&B | 17 |
| Sobeys | Grocery & Specialty Foods | 13 |
| Save On Foods | Grocery & Specialty Foods | 13 |
| Home Sense | Home Furnishings & Accessories | 12 |
| Bootlegger | Clothing & Apparel | 12 |
| Old Navy | Clothing & Apparel | 11 |
| Ricki's | Clothing & Apparel | 10 |
| Olive Garden | Full Service F&B | 10 |
| Lululemon | Clothing & Apparel | 10 |
| Children's Place | Clothing & Apparel | 10 |
| Swiss Chalet | Full Service F&B | 9 |
| Petsmart | Specialty Retail | 9 |
| Tan Jay | Footwear | 8 |
| Burger King | Limited Service F&B | 8 |
| Toys R Us | Toys & Hobbies | 7 |
| Tony Roma's | Full Service F&B | 7 |
| Red Robin | Full Service F&B | 7 |
| Red Lobster | Full Service F&B | 7 |
| Lowes | Home Improvement & Gardening | 7 |
| Coras Breakfast | Full Service F&B | 7 |
| Stitches | Clothing & Apparel | 6 |
| Spring | Footwear | 6 |
| Penningtons | Clothing & Apparel | 6 |
| Marshalls | Clothing & Apparel | 6 |
| Laura's | Clothing & Apparel | 6 |

| Retailer / Tenant Type | Merchandise Category | Number of Responses |
|---|---|---|
| Justice | Clothing & Apparel | 6 |
| Joey's Only | Full Service F&B | 6 |
| Gap | Clothing & Apparel | 6 |
| American Eagle | Clothing & Apparel | 6 |
| Aldo | Footwear | 6 |
| Addition Elle | Clothing & Apparel | 6 |
| HMV | Books & Multi-Media | 5 |
| Cabelas | Sporting Goods & Outdoor Recreation | 5 |
| Arby's | Full Service F&B | 5 |
| Alia | Clothing & Apparel | 5 |
| West 49 | Clothing & Apparel | 4 |
| The Bay | General Merchandise | 4 |
| Suzanne's | Clothing & Apparel | 4 |
| Sears | General Merchandise | 4 |
| Pink | Clothing & Apparel | 4 |
| Pier 1 | Home Furnishings & Accessories | 4 |
| Northern Reflections | Clothing & Apparel | 4 |
| Eastside Mario's | Full Service F&B | 4 |
| Coles | Books & Multi-Media | 4 |
| Ardene's | Jewelry & Accessories | 4 |
| Victoria's Secret | Clothing & Apparel | 3 |
| Shoe Warehouse | Footwear | 3 |
| Rona | Home Improvement & Gardening | 3 |
| Kins Market | Grocery & Specialty Foods | 3 |
| Joeys | Full Service F&B | 3 |
| Famosa | Limited Service F&B | 3 |
| Carter's | Clothing & Apparel | 3 |
| Cactus Club | Full Service F&B | 3 |
| Below The Belt | Clothing & Apparel | 3 |
| Aeropostale | Clothing & Apparel | 3 |
| Value Village | General Merchandise | 2 |
| Skechers | Footwear | 2 |
| Pro Bike Shop | Sporting Goods & Outdoor Recreation | 2 |
| Please Mum | Clothing & Apparel | 2 |
| Moores | Clothing & Apparel | 2 |
| London Drugs | General Merchandise | 2 |
| Le Chateau | Clothing & Apparel | 2 |
| La Senza | Clothing & Apparel | 2 |
| Kinkos | Specialty Retail | 2 |

# B

| Retailer / Tenant Type | Merchandise Category | Number of Responses |
|---|---|---|
| IKEA | Home Furnishings & Accessories | 2 |
| Home Outfitters | Home Furnishings & Accessories | 2 |
| Hallmark/Carlton Cards | Specialty Retail | 2 |
| H&M | Clothing & Apparel | 2 |
| Guess | Clothing & Apparel | 2 |
| Global Pet Food | Specialty Retail | 2 |
| Garage | Clothing & Apparel | 2 |
| Gap Kids | Clothing & Apparel | 2 |
| Foot Locker | Footwear | 2 |
| Five Guys Burger & Fries | Limited Service F&B | 2 |
| Eddie Bauer | Clothing & Apparel | 2 |
| EB Games | Toys & Hobbies | 2 |
| Curves | Personal Services | 2 |
| Chopped Leaf | Limited Service F&B | 2 |
| Chili's | Full Service F&B | 2 |
| Cheesecake Factory | Full Service F&B | 2 |
| Bulk Barn | Specialty Retail | 2 |
| Bluenotes | Clothing & Apparel | 2 |
| Bed Bath & Beyond | Home Furnishings & Accessories | 2 |
| Bath & Body Works | Health & Beauty | 2 |
| Apple Store | Home Electronics & Appliances | 2 |
| Zara | Clothing & Apparel | 1 |
| Whole Foods | Grocery & Specialty Foods | 1 |
| VW Dealership | Auto/RV/Motorsports Dealerships | 1 |
| Urban Planet | Clothing & Apparel | 1 |
| Toyota | Auto/RV/Motorsports Dealerships | 1 |
| Town Shoes | Footwear | 1 |
| Tim Hortons | Limited Service F&B | 1 |
| TGIF | Full Service F&B | 1 |
| Teavana | Limited Service F&B | 1 |
| Target | General Merchandise | 1 |
| Tara Breads | Grocery & Specialty Foods | 1 |
| Taco Time | Limited Service F&B | 1 |
| Suzy Shier | Clothing & Apparel | 1 |
| Stokes | Home Furnishings & Accessories | 1 |
| Sterling | Footwear | 1 |
| State Farm Insurance | Personal Services | 1 |
| Starbucks | Limited Service F&B | 1 |
| Sof Moc | Footwear | 1 |
| Smart Set | Clothing & Apparel | 1 |
| Shoe Company | Footwear | 1 |
| Sephora | Health & Beauty | 1 |
| Second Cup | Limited Service F&B | 1 |
| Sarento's | Full Service F&B | 1 |

| Retailer / Tenant Type | Merchandise Category | Number of Responses |
|---|---|---|
| RW & CO | Clothing & Apparel | 1 |
| Runners World | Footwear | 1 |
| Royale Pizza | Limited Service F&B | 1 |
| ROSS | Clothing & Apparel | 1 |
| Quilts etc | Home Furnishings & Accessories | 1 |
| Osh Kosh | Clothing & Apparel | 1 |
| Old Spaghetti Factory | Full Service F&B | 1 |
| New York Fries | Limited Service F&B | 1 |
| Naturalizer | Footwear | 1 |
| Nando's Chicken | Limited Service F&B | 1 |
| Mr Mikes | Full Service F&B | 1 |
| Moutain Equipment Coop | Sporting Goods & Outdoor Recreation | 1 |
| Mongolian Grill | Limited Service F&B | 1 |
| LL Bean | Clothing & Apparel | 1 |
| Kelsey's | Full Service F&B | 1 |
| Kal Tire | Auto Parts, Services & Accessories | 1 |
| Izod | Clothing & Apparel | 1 |
| IHOP | Full Service F&B | 1 |
| Harvey's | Limited Service F&B | 1 |
| Golf Town | Sporting Goods & Outdoor Recreation | 1 |
| Forever 21 | Clothing & Apparel | 1 |
| Ecco Shoes | Footwear | 1 |
| Dynamite | Clothing & Apparel | 1 |
| Denny's | Full Service F&B | 1 |
| Claire's | Jewelry & Accessories | 1 |
| Carter's | Clothing & Apparel | 1 |
| Carl's Jr | Limited Service F&B | 1 |
| Buffalo | Clothing & Apparel | 1 |
| Body Shop | Health & Beauty | 1 |
| Bellissima | Clothing & Apparel | 1 |
| Bella Maas Boutique | Clothing & Apparel | 1 |
| Bata Shoes | Footwear | 1 |
| Bass Pro | Sporting Goods & Outdoor Recreation | 1 |
| Banana Republic | Clothing & Apparel | 1 |
| Baby Palace | Clothing & Apparel | 1 |
| Axe Music | Specialty Retail | 1 |
| Atmosphere | Sporting Goods & Outdoor Recreation | 1 |
| Aritzia | Clothing & Apparel | 1 |
| Applebees | Full Service F&B | 1 |
| Andrea's | Clothing & Apparel | 1 |

# B

| Retailer / Tenant Type | Merchandise Category | Number of Responses |
|---|---|---|
| Boutiques Downtown | Clothing & Apparel | 4 |
| Organic Food Store | Grocery & Specialty Foods | 4 |
| Womens Clothing | Clothing & Apparel | 14 |
| Childrens Clothing | Clothing & Apparel | 9 |
| Fabric Store | Specialty Retail | 3 |
| Greenhouses | Home Improvement & Gardening | 1 |
| Mens Clothing | Clothing & Apparel | 9 |
| Shoe Stores | Footwear | 11 |
| Snowboard/Bike/Runner | Sporting Goods & Outdoor Recreation | 4 |
| Fish/Meat Market | Grocery & Specialty Foods | 4 |
| Department Store | General Merchandise | 1 |
| Hair Salon | Personal Services | 3 |
| Childcare | Personal Services | 2 |
| Medical Clinic | Personal Services | 1 |
| Auto Parts/Repair/Body Shop | Auto Parts, Services & Accessories | 6 |
| Travel Agency | Personal Services | 2 |
| Windshield Repair | Auto Parts, Services & Accessories | 2 |
| Bowling Alley | Entertainment & Leisure | 1 |
| Movie Theatre | Entertainment & Leisure | 16 |
| Live Theatre | Entertainment & Leisure | 1 |
| Sports Bars/Pubs | Entertainment & Leisure | 2 |
| Paintball/Laser Tag | Entertainment & Leisure | 1 |
| Casino | Entertainment & Leisure | 2 |
| Live Music Club | Entertainment & Leisure | 3 |
| Family Fun Activities | Entertainment & Leisure | 4 |
| Arcade & Game Room | Entertainment & Leisure | 1 |
| Shooting Range | Entertainment & Leisure | 1 |
| Hot Yoga | Personal Services | 2 |
| Brazilian Steakhouse | Full Service F&B | 1 |
| Locally Owned Cafes | Limited Service F&B | 7 |
| Local Family Dining | Full Service F&B | 11 |
| Local Fine Dining | Full Service F&B | 4 |
| Local Steakhouse | Full Service F&B | 2 |
| Ethnic | | 5 |
| East Indian | | 4 |
| Chinese | | 4 |
| Mexican | | 1 |
| Greek | | 1 |
| Japanese | | 3 |
| Thai | | 3 |
| Food Trucks | | 1 |

## FORT SASKATCHEWAN CONSUMER SURVEY

### INTERVIEW LOCATION

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | DOW CENTENNIAL CENTRE | 50 | 25.0 | 25.0 | 25.0 |
| | CORNERSTONE CENTRE | 68 | 34.0 | 34.0 | 59.0 |
| | DOWNTOWN FS | 57 | 28.5 | 28.5 | 87.5 |
| | THE KANATA | 25 | 12.5 | 12.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### CITY RESPONDENT RESIDES

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | PART TIME RESIDENT | 30 | 15.0 | 15.0 | 15.0 |
| | CITY OF FT SASKATCHEWAN | 125 | 62.5 | 62.5 | 77.5 |
| | STURGEON COUNTY | 5 | 2.5 | 2.5 | 80.0 |
| | GIBBONS | 3 | 1.5 | 1.5 | 81.5 |
| | SHERWOOD PARK | 3 | 1.5 | 1.5 | 83.0 |
| | STRATHCONA COUNTY | 6 | 3.0 | 3.0 | 86.0 |
| | OTHER | 28 | 14.0 | 14.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### Q1A. PRIMARY CONVENIENCE SHOPPING CENTER

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | NO CONVENIENCE PRIMARY | 1 | .5 | .5 | .5 |
| | DOWNTOWN FS | 12 | 6.0 | 6.0 | 6.5 |
| | CORNERSTONE CENTRE | 71 | 35.5 | 35.5 | 42.0 |
| | SOUTHPOINTE | 3 | 1.5 | 1.5 | 43.5 |
| | COSTCO NE EDM | 2 | 1.0 | 1.0 | 44.5 |
| | SAFEWAY | 55 | 27.5 | 27.5 | 72.0 |
| | NO FRILLS | 28 | 14.0 | 14.0 | 86.0 |
| | OTHER SC | 28 | 14.0 | 14.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

FORT SASKATCHEWAN CONSUMER SURVEY

**$Q1C Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response [a] | CLOSE TO HOME | 59 | 13.5% | 29.5% |
| | CLOSE WORK HOTEL | 21 | 4.8% | 10.5% |
| | PRICES | 83 | 19.0% | 41.5% |
| | ONE STOP SHOP | 39 | 8.9% | 19.5% |
| | NOT CROWDED | 3 | .7% | 1.5% |
| | FAMILIARITY | 41 | 9.4% | 20.5% |
| | PARKING | 1 | .2% | .5% |
| | CUSTOMER SERVICE | 14 | 3.2% | 7.0% |
| | SALES PROMOS | 24 | 5.5% | 12.0% |
| | BUY IN BULK | 5 | 1.1% | 2.5% |
| | SUPPORT LOCAL | 12 | 2.7% | 6.0% |
| | SELECTION PRODUCTS | 18 | 4.1% | 9.0% |
| | SELECTION STORES | 2 | .5% | 1.0% |
| | SHOP SPECIFIC STORE | 1 | .2% | .5% |
| | SPECIFIC ITEM BRAND | 34 | 7.8% | 17.0% |
| | IN THE AREA | 3 | .7% | 1.5% |
| | QUALITY PRODUCTS | 38 | 8.7% | 19.0% |
| | CONVENIENCE ITEMS | 7 | 1.6% | 3.5% |
| | MEETS NEEDS | 10 | 2.3% | 5.0% |
| | PROXIMITY OTHER AREAS | 4 | .9% | 2.0% |
| | QUALITY STORES | 1 | .2% | .5% |
| | EASY ACCESS | 14 | 3.2% | 7.0% |
| | HOURS OF OPERATION | 3 | .7% | 1.5% |
| Total | | 437 | 100.0% | 218.5% |

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY

**Q2A. PRIMARY COMPARISON SHOPPING CENTER**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | NO COMPARISON PRIMARY | 10 | 5.0 | 5.0 | 5.0 |
| | DOWNTOWN FS | 2 | 1.0 | 1.0 | 6.0 |
| | CORNERSTONE CENTRE | 72 | 36.0 | 36.0 | 42.0 |
| | COSTCO NE EDM | 2 | 1.0 | 1.0 | 43.0 |
| | EMERALD HILLS | 3 | 1.5 | 1.5 | 44.5 |
| | SHERWOOD PARK MALL | 43 | 21.5 | 21.5 | 66.0 |
| | OTHER SC | 68 | 34.0 | 34.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

**$Q2C Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q2C. MAIN REASONS SHOP PRIMARY COMPARISON SC - Multiple Response[a] | NO SPECIFIC REASON | 1 | .2% | .5% |
| | CLOSE TO HOME | 33 | 7.7% | 16.5% |
| | CLOSE WORK HOTEL | 11 | 2.6% | 5.5% |
| | PRICES | 57 | 13.4% | 28.5% |
| | ONE STOP SHOP | 44 | 10.3% | 22.0% |
| | NOT CROWDED | 4 | .9% | 2.0% |
| | FAMILIARITY | 10 | 2.3% | 5.0% |
| | PARKING | 5 | 1.2% | 2.5% |
| | CUSTOMER SERVICE | 7 | 1.6% | 3.5% |
| | SALES PROMOS | 9 | 2.1% | 4.5% |
| | SUPPORT LOCAL | 10 | 2.3% | 5.0% |
| | SELECTION PRODUCTS | 29 | 6.8% | 14.5% |
| | SELECTION STORES | 78 | 18.3% | 39.0% |
| | SHOP SPECIFIC STORE | 28 | 6.6% | 14.0% |
| | SPECIFIC ITEM BRAND | 13 | 3.1% | 6.5% |
| | DAY OUT WINDOW SHOP | 2 | .5% | 1.0% |
| | IN THE AREA | 5 | 1.2% | 2.5% |
| | QUALITY PRODUCTS | 8 | 1.9% | 4.0% |
| | COMPARISON ITEMS | 1 | .2% | .5% |
| | CLOTHING | 28 | 6.6% | 14.0% |
| | SHOES | 3 | .7% | 1.5% |
| | MEETS NEEDS | 18 | 4.2% | 9.0% |
| | PROXIMITY OTHER AREAS | 2 | .5% | 1.0% |
| | QUALITY STORES | 7 | 1.6% | 3.5% |
| | DEPARTMENT STORES | 4 | .9% | 2.0% |
| | EASY ACCESS | 9 | 2.1% | 4.5% |
| Total | | 426 | 100.0% | 213.0% |

a. Group

C

FORT SASKATCHEWAN CONSUMER SURVEY

**Descriptive Statistics**

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Q3A. % SPEND CLOTHES FOOTWEAR FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 30.5 | 36.8 |
| Q3B. % SPEND CLOTHES FOOTWEAR OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 65.5 | 38.7 |
| Q3C. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO FT SASKATCHEWAN | 200 | 1 | 10 | 7.2 | 3.3 |
| Q4A. % SPEND BOOKS MUSIC FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 19.9 | 36.1 |
| Q4B. % SPEND BOOK MUSIC OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 42.2 | 46.4 |
| Q4C. IMPORTANCE RATING ADD BOOKS MUSIC TO FT SASKATCHEWAN | 200 | 1 | 10 | 5.7 | 3.8 |
| Q5A. % SPEND ELECTRONICS COMPUTERS FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 23.3 | 39.2 |
| Q5B. % SPEND ELECTRONICS COMPUTERS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 31.7 | 43.8 |
| Q5C. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO FT SASKATCHEWAN | 200 | 1 | 10 | 5.5 | 3.6 |
| Q6A. % SPEND FURNISHINGS APPLIANCES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 19.9 | 37.8 |
| Q6B. % SPEND FURNISHINGS APPLIANCES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 30.6 | 44.4 |
| Q6C. IMPORTANCE RATING ADD FURNISHINGS APPLIANCES TO FT SASKATCHEWAN | 200 | 1 | 10 | 5.1 | 3.4 |
| Q7A. % SPEND SPORTING GOODS TOYS CRAFTS HOBBIES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 26.9 | 37.1 |
| Q7B. % SPEND SPORTING GOODS TOYS HOBBIES CRAFTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 41.6 | 42.9 |
| Q7C. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES CRAFTS TO FT SASKATCHEWAN | 200 | 1 | 10 | 5.6 | 3.4 |
| Q8A. % SPEND SPECIALTY RETAIL FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 21.0 | 36.9 |
| Q8B. % SPEND SPECIALTY RETAIL OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 26.0 | 40.3 |
| Q8C. IMPORTANCE RATING ADD SPECIALTY RETAIL TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.4 | 3.2 |
| Q9A. % SPEND GROCERY DRUGSTORE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 74.3 | 34.9 |

FORT SASKATCHEWAN CONSUMER SURVEY

**Descriptive Statistics**

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Q9B. % SPEND GROCERY DRUGSTORE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 25.2 | 34.5 |
| Q9C. IMPORTANCE RATING ADD GROCERY DRUGSTORE TO FT SASKATCHEWAN | 200 | 1 | 10 | 6.0 | 3.8 |
| Q10A. % SPEND HOME IMPROVEMENT GARDEN FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 52.8 | 46.4 |
| Q10B. % SPEND HOME IMPROVEMENT GARDEN OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 19.2 | 34.7 |
| Q10C. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.9 | 3.5 |
| Q11A. % SPEND OFFICE SUPPLIES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 53.4 | 48.3 |
| Q11B. % SPEND OFFICE SUPPLIES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 16.1 | 34.4 |
| Q11C. IMPORTANCE RATING ADD OFFICE SUPPLIES TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.2 | 3.4 |
| Q12A. % SPEND PET SUPPLIES SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 34.8 | 46.4 |
| Q12B. % SPEND PET SUPPLIES SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 19.7 | 38.3 |
| Q12C. IMPORTANCE RATING ADD PET SUPPLIES SERVICES TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.2 | 3.6 |
| Q13A. % SPEND AUTOMOTIVE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 45.3 | 47.4 |
| Q13B. % SPEND AUTOMOTIVE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 30.2 | 43.3 |
| Q13C. IMPORTANCE RATING ADD AUTOMOTIVE TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.6 | 3.7 |
| Q14A. % USE PERSONAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 54.2 | 46.1 |
| Q14B. % USE PERSONAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 28.3 | 40.8 |
| Q14C. IMPORTANCE RATING ADD PERSONAL SERVICES TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.3 | 3.6 |
| Q15A. % USE PROFESSIONAL FINANCIAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 64.4 | 41.7 |
| Q15B. % USE PROFESSIONAL FINANCIAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 34.1 | 41.2 |
| Q15C. IMPORTANCE RATING ADD PROFESSIONAL FINANCIAL SERVICES TO FT SASKATCHEWAN | 200 | 1 | 10 | 4.0 | 3.4 |
| Q16A. % USE FITNESS DAY SPA FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 41.9 | 47.7 |
| Q16B. % USE FITNESS DAY SPA OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 11.6 | 29.3 |

C

FORT SASKATCHEWAN CONSUMER SURVEY

**Descriptive Statistics**

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Q16C. IMPORTANCE RATING ADD FITNESS DAY SPA TO FT SASKATCHEWAN | 200 | 1 | 10 | 3.8 | 3.4 |
| Q17A. % GO TO COFFEE CAFE FAST FOOD FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 66.8 | 35.6 |
| Q17B. % GO TO COFFEE CAFE FAST FOOD OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 24.2 | 29.7 |
| Q17C. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO FT SASKATCHEWAN | 200 | 1 | 10 | 5.1 | 3.5 |
| Q18A. % EAT OUT FULL SERVICE RESTAURANTS FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 50.3 | 37.4 |
| Q18B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 41.7 | 36.4 |
| Q18C. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO FT SASKATCHEWAN | 200 | 1 | 10 | 7.2 | 3.3 |
| Q19A. % USE ENTERTAINMENT FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 31.3 | 40.0 |
| Q19B. % USE ENTERTAINMENT OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 42.8 | 43.6 |
| Q19C. IMPORTANCE RATING ADD ENTERTAINMENT TO FT SASKATCHEWAN | 200 | 1 | 10 | 5.7 | 3.7 |
| Valid N (listwise) | 200 | | | | |

FORT SASKATCHEWAN CONSUMER SURVEY

**$Q20 Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q20. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 2 | .5% | 1.0% |
| | CLOSE TO HOME | 68 | 15.5% | 34.0% |
| | CLOSE TO WORK HOTEL | 18 | 4.1% | 9.0% |
| | PRICES SALES PROMOS | 9 | 2.0% | 4.5% |
| | ONE STOP SHOP | 19 | 4.3% | 9.5% |
| | NOT CROWDED | 9 | 2.0% | 4.5% |
| | MEETS NEEDS | 74 | 16.8% | 37.0% |
| | PARKING TRAFFIC | 12 | 2.7% | 6.0% |
| | CUSTOMER SERVICE | 31 | 7.0% | 15.5% |
| | EASY ACCESS | 38 | 8.6% | 19.0% |
| | SELECTION STORES | 1 | .2% | .5% |
| | SELECTION RESTAURANTS | 2 | .5% | 1.0% |
| | LIKE SPECIFIC STORE | 14 | 3.2% | 7.0% |
| | SELECTION PRODUCTS | 4 | .9% | 2.0% |
| | IN STOCK | 1 | .2% | .5% |
| | PROXIMITY OTHER AREAS | 23 | 5.2% | 11.5% |
| | SUPPORT LOCAL | 41 | 9.3% | 20.5% |
| | FAMILIARITY | 8 | 1.8% | 4.0% |
| | QUALITY STORES | 2 | .5% | 1.0% |
| | HOURS OF OPERATION | 3 | .7% | 1.5% |
| | DOWNTOWN FS | 40 | 9.1% | 20.0% |
| | GREENSPACE | 6 | 1.4% | 3.0% |
| | ACTIVITIES | 15 | 3.4% | 7.5% |
| Total | | 440 | 100.0% | 220.0% |

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY

**$Q21 Frequencies**

| | | Responses | | |
|---|---|---|---|---|
| | | N | Percent | Percent of Cases |
| Q21. DISLIKE MOST ABOUT SHOPPING OPPORTUNITES IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 34 | 12.8% | 17.0% |
| | PRICES SALES PROMOS | 5 | 1.9% | 2.5% |
| | CROWDED | 4 | 1.5% | 2.0% |
| | PARKING TRAFFIC | 1 | .4% | .5% |
| | CUSTOMER SERVICE | 7 | 2.6% | 3.5% |
| | ACCESS | 10 | 3.8% | 5.0% |
| | SELECTION STORES | 133 | 50.2% | 66.5% |
| | SELECTION RESTAURANTS | 31 | 11.7% | 15.5% |
| | MISSING SPECIFIC STORE | 3 | 1.1% | 1.5% |
| | PROFESSIONAL PERSONAL SERVICES | 2 | .8% | 1.0% |
| | SELECTION PRODUCTS | 3 | 1.1% | 1.5% |
| | NOT IN STOCK | 2 | .8% | 1.0% |
| | QUALITY STORES | 1 | .4% | .5% |
| | EMPTY BUILDINGS | 1 | .4% | .5% |
| | HOURS OF OPERATION | 7 | 2.6% | 3.5% |
| | LACKS ENTERTAINMENT | 4 | 1.5% | 2.0% |
| | LACKS ACTIVITIES | 1 | .4% | .5% |
| | NO MALL | 16 | 6.0% | 8.0% |
| Total | | 265 | 100.0% | 132.5% |

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY

**$Q22 Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q22. STORES SERVICES INCREASE SPENDING IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 7 | .9% | 3.5% |
| | DEPT STORE | 16 | 2.1% | 8.0% |
| | WINNERS | 36 | 4.8% | 18.0% |
| | CLOTHING FOOTWEAR | 156 | 20.9% | 78.0% |
| | BOOKS MUSIC DVD | 42 | 5.6% | 21.0% |
| | ELECTRONICS COMPUTERS | 35 | 4.7% | 17.5% |
| | FURNISHINGS APPLIANCES | 16 | 2.1% | 8.0% |
| | SPORTING GOODS | 31 | 4.2% | 15.5% |
| | SPECIALTY RETAIL | 11 | 1.5% | 5.5% |
| | GROCERY DRUGSTORE | 54 | 7.2% | 27.0% |
| | HOME IMPROVEMENT GARDEN | 7 | .9% | 3.5% |
| | OFFICE SUPPLY ITEMS | 6 | .8% | 3.0% |
| | PET SUPPLIES SERVICES | 5 | .7% | 2.5% |
| | AUTOMOTIVE | 6 | .8% | 3.0% |
| | PERSONAL SERVICES | 3 | .4% | 1.5% |
| | PROFESSIONAL FINANCIAL SERVICES | 1 | .1% | .5% |
| | FITNESS CLUB DAY SPA | 7 | .9% | 3.5% |
| | COFFEE CAFES FAST FOOD | 44 | 5.9% | 22.0% |
| | FULL SERVICE RESTAURANTS | 142 | 19.0% | 71.0% |
| | ENTERTAINMENT | 30 | 4.0% | 15.0% |
| | A MALL | 4 | .5% | 2.0% |
| | TOYS HOBBIES CRAFTS | 31 | 4.2% | 15.5% |
| | COSTCO | 56 | 7.5% | 28.0% |
| Total | | 746 | 100.0% | 373.0% |

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY

**Statistics**

| | | D1. HOUSEHOLD SIZE | D2. # HOUSEHOLD < 18 YEARS OLD |
|---|---|---|---|
| N | Valid | 200 | 200 |
| | Missing | 0 | 0 |
| Mean | | 3.04 | .78 |

**D1. HOUSEHOLD SIZE**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 1 | 16 | 8.0 | 8.0 | 8.0 |
| | 2 | 73 | 36.5 | 36.5 | 44.5 |
| | 3 | 34 | 17.0 | 17.0 | 61.5 |
| | 4 | 50 | 25.0 | 25.0 | 86.5 |
| | 5 | 22 | 11.0 | 11.0 | 97.5 |
| | 6 | 2 | 1.0 | 1.0 | 98.5 |
| | 7 | 3 | 1.5 | 1.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

**D2. # HOUSEHOLD < 18 YEARS OLD**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 0 | 116 | 58.0 | 58.0 | 58.0 |
| | 1 | 32 | 16.0 | 16.0 | 74.0 |
| | 2 | 37 | 18.5 | 18.5 | 92.5 |
| | 3 | 11 | 5.5 | 5.5 | 98.0 |
| | 4 | 3 | 1.5 | 1.5 | 99.5 |
| | 5 | 1 | .5 | .5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

## FORT SASKATCHEWAN CONSUMER SURVEY

### D3. RESPONDENT AGE

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 18-24 | 27 | 13.5 | 13.5 | 13.5 |
| | 25-34 | 41 | 20.5 | 20.5 | 34.0 |
| | 35-44 | 45 | 22.5 | 22.5 | 56.5 |
| | 45-54 | 35 | 17.5 | 17.5 | 74.0 |
| | 55-64 | 27 | 13.5 | 13.5 | 87.5 |
| | 65-74 | 20 | 10.0 | 10.0 | 97.5 |
| | 75+ | 5 | 2.5 | 2.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### D4. HOUSEHOLD YEARLY INCOME

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | REFUSED DK | 20 | 10.0 | 10.0 | 10.0 |
| | <$15,000 | 1 | .5 | .5 | 10.5 |
| | $15,000-$24,999 | 7 | 3.5 | 3.5 | 14.0 |
| | $25,000-$34,999 | 7 | 3.5 | 3.5 | 17.5 |
| | $35,000-$44,999 | 5 | 2.5 | 2.5 | 20.0 |
| | $45,000-$54,999 | 12 | 6.0 | 6.0 | 26.0 |
| | $55,000-$64,999 | 16 | 8.0 | 8.0 | 34.0 |
| | $65,000-$74,999 | 16 | 8.0 | 8.0 | 42.0 |
| | $75,000-$99,999 | 30 | 15.0 | 15.0 | 57.0 |
| | $100,000-$124,999 | 41 | 20.5 | 20.5 | 77.5 |
| | $125,000+ | 45 | 22.5 | 22.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### D5. RESPONDENT GENDER

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | MALE | 73 | 36.5 | 36.5 | 36.5 |
| | FEMALE | 127 | 63.5 | 63.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**INTERVIEW LOCATION**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | DOW CENTENNIAL CENTRE | 3 | 10.0 | 10.0 | 10.0 |
| | CORNERSTONE CENTRE | 3 | 10.0 | 10.0 | 20.0 |
| | THE KANATA | 24 | 80.0 | 80.0 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

**CITY RESPONDENT RESIDES**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | PART TIME RESIDENT | 30 | 100.0 | 100.0 | 100.0 |

**Q1A. PRIMARY CONVENIENCE SHOPPING CENTER**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | CORNERSTONE CENTRE | 6 | 20.0 | 20.0 | 20.0 |
| | SOUTHPOINTE | 1 | 3.3 | 3.3 | 23.3 |
| | SAFEWAY | 6 | 20.0 | 20.0 | 43.3 |
| | NO FRILLS | 5 | 16.7 | 16.7 | 60.0 |
| | OTHER SC | 12 | 40.0 | 40.0 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**$Q1C Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response [a] | CLOSE TO HOME | 6 | 11.5% | 20.0% |
| | CLOSE WORK HOTEL | 11 | 21.2% | 36.7% |
| | PRICES | 10 | 19.2% | 33.3% |
| | ONE STOP SHOP | 1 | 1.9% | 3.3% |
| | FAMILIARITY | 5 | 9.6% | 16.7% |
| | CUSTOMER SERVICE | 3 | 5.8% | 10.0% |
| | SALES PROMOS | 1 | 1.9% | 3.3% |
| | BUY IN BULK | 1 | 1.9% | 3.3% |
| | SELECTION PRODUCTS | 1 | 1.9% | 3.3% |
| | SPECIFIC ITEM BRAND | 4 | 7.7% | 13.3% |
| | QUALITY PRODUCTS | 3 | 5.8% | 10.0% |
| | QUALITY STORES | 1 | 1.9% | 3.3% |
| | EASY ACCESS | 3 | 5.8% | 10.0% |
| | HOURS OF OPERATION | 2 | 3.8% | 6.7% |
| Total | | 52 | 100.0% | 173.3% |

a. Group

**Q2A. PRIMARY COMPARISON SHOPPING CENTER**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | NO COMPARISON PRIMARY | 2 | 6.7 | 6.7 | 6.7 |
| | CORNERSTONE CENTRE | 13 | 43.3 | 43.3 | 50.0 |
| | OTHER SC | 15 | 50.0 | 50.0 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

D

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**$Q2C Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q2C. MAIN REASONS SHOP PRIMARY COMPARISON SC - Multiple Response[a] | CLOSE TO HOME | 3 | 6.1% | 10.0% |
| | CLOSE WORK HOTEL | 7 | 14.3% | 23.3% |
| | PRICES | 10 | 20.4% | 33.3% |
| | ONE STOP SHOP | 5 | 10.2% | 16.7% |
| | NOT CROWDED | 2 | 4.1% | 6.7% |
| | CUSTOMER SERVICE | 1 | 2.0% | 3.3% |
| | SALES PROMOS | 3 | 6.1% | 10.0% |
| | SUPPORT LOCAL | 1 | 2.0% | 3.3% |
| | SELECTION STORES | 9 | 18.4% | 30.0% |
| | SHOP SPECIFIC ... | 1 | 2.0% | 3.3% |
| | SPECIFIC ITEM BRAND | 3 | 6.1% | 10.0% |
| | QUALITY PRODUCTS | 1 | 2.0% | 3.3% |
| | MEETS NEEDS | 2 | 4.1% | 6.7% |
| | EASY ACCESS | 1 | 2.0% | 3.3% |
| Total | | 49 | 100.0% | 163.3% |

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**Descriptive Statistics**

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Q3A. % SPEND CLOTHES FOOTWEAR FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 18.1 | 30.0 |
| Q3B. % SPEND CLOTHES FOOTWEAR OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 81.9 | 30.0 |
| Q3C. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO FT SASKATCHEWAN | 30 | 1 | 10 | 3.6 | 3.7 |
| Q4A. % SPEND BOOKS MUSIC FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 5.8 | 20.0 |
| Q4B. % SPEND BOOK MUSIC OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 40.8 | 48.3 |
| Q4C. IMPORTANCE RATING ADD BOOKS MUSIC TO FT SASKATCHEWAN | 30 | 1 | 10 | 3.2 | 3.7 |
| Q5A. % SPEND ELECTRONICS COMPUTERS FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 9.7 | 25.9 |
| Q5B. % SPEND ELECTRONICS COMPUTERS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 27.0 | 42.5 |
| Q5C. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO FT SASKATCHEWAN | 30 | 1 | 10 | 3.3 | 3.4 |
| Q6A. % SPEND FURNISHINGS APPLIANCES FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 20 | 1.3 | 5.1 |
| Q6B. % SPEND FURNISHINGS APPLIANCES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 18.7 | 38.2 |
| Q6C. IMPORTANCE RATING ADD FURNISHINGS APPLIANCES TO FT SASKATCHEWAN | 30 | 1 | 7 | 1.8 | 1.8 |
| Q7A. % SPEND SPORTING GOODS TOYS CRAFTS HOBBIES FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 6.2 | 19.0 |
| Q7B. % SPEND SPORTING GOODS TOYS HOBBIES CRAFTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 40.5 | 47.5 |
| Q7C. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES CRAFTS TO FT SASKATCHEWAN | 30 | 1 | 9 | 2.1 | 2.1 |
| Q8A. % SPEND SPECIALTY RETAIL FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 5.5 | 18.7 |
| Q8B. % SPEND SPECIALTY RETAIL OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 24.5 | 41.5 |
| Q8C. IMPORTANCE RATING ADD SPECIALTY RETAIL TO FT SASKATCHEWAN | 30 | 1 | 5 | 1.6 | 1.3 |

D

## FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**Descriptive Statistics**

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Q9A. % SPEND GROCERY DRUGSTORE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 36.5 | 38.4 |
| Q9B. % SPEND GROCERY DRUGSTORE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 63.5 | 38.4 |
| Q9C. IMPORTANCE RATING ADD GROCERY DRUGSTORE TO FT SASKATCHEWAN | 30 | 1 | 10 | 4.0 | 4.1 |
| Q10A. % SPEND HOME IMPROVEMENT GARDEN FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 7.3 | 25.5 |
| Q10B. % SPEND HOME IMPROVEMENT GARDEN OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 36.0 | 48.3 |
| Q10C. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO FT SASKATCHEWAN | 30 | 1 | 10 | 2.2 | 2.6 |
| Q11A. % SPEND OFFICE SUPPLIES FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 18.8 | 38.0 |
| Q11B | 30 | 0 | 100 | 37.8 | 48.0 |
| Q11C | 30 | 1 | 10 | 2.7 | 3.2 |
| Q12A. % SPEND PET SUPPLIES SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 50 | 1.7 | 9.1 |
| Q12B | 30 | 0 | 100 | 35.0 | 47.6 |
| Q12C | 30 | 1 | 5 | 1.5 | 1.3 |
| Q13A. % SPEND AUTOMOTIVE FT SASKATCHEWAN PAST 3 MONTHS | 29 | 0 | 100 | 28.4 | 45.2 |
| Q13B | 30 | 0 | 100 | 35.8 | 48.1 |
| Q13C | 30 | 1 | 10 | 1.8 | 2.0 |
| Q14A. % USE PERSONAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 17.8 | 35.1 |
| Q14B. % USE PERSONAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 75.5 | 40.4 |
| Q14C. IMPORTANCE RATING ADD PERSONAL SERVICES TO FT SASKATCHEWAN | 30 | 1 | 10 | 2.3 | 2.5 |
| Q15A. % USE PROFESSIONAL FINANCIAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 11.3 | 23.3 |
| Q15B. % USE PROFESSIONAL FINANCIAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 88.7 | 23.3 |
| Q15C. IMPORTANCE RATING ADD PROFESSIONAL FINANCIAL SERVICES TO FT SASKATCHEWAN | 30 | 1 | 9 | 1.8 | 1.9 |

## FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**Descriptive Statistics**

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Q16A. % USE FITNESS DAY SPA FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 15.7 | 35.0 |
| Q16B. % USE FITNESS DAY SPA OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 21.0 | 39.7 |
| Q16C. IMPORTANCE RATING ADD FITNESS DAY SPA TO FT SASKATCHEWAN | 30 | 1 | 6 | 1.5 | 1.4 |
| Q17A. % GO TO COFFEE CAFE FAST FOOD FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 43.2 | 33.1 |
| Q17B. % GO TO COFFEE CAFE FAST FOOD OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 46.8 | 33.7 |
| Q17C. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO FT SASKATCHEWAN | 30 | 1 | 10 | 5.5 | 3.9 |
| Q18A. % EAT OUT FULL SERVICE RESTAURANTS FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 45.0 | 31.9 |
| Q18B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 51.7 | 32.3 |
| Q18C. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO FT SASKATCHEWAN | 30 | 1 | 10 | 9.0 | 2.4 |
| Q19A. % USE ENTERTAINMENT FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 7.5 | 25.3 |
| Q19B. % USE ENTERTAINMENT OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 30 | 0 | 100 | 55.8 | 49.7 |
| Q19C. IMPORTANCE RATING ADD ENTERTAINMENT TO FT SASKATCHEWAN | 30 | 1 | 10 | 3.1 | 3.5 |
| Valid N (listwise) | 29 | | | | |

D

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**$Q20 Frequencies**

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| Q20. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 1 | 1.8% | 3.3% |
| | CLOSE TO HOME | 3 | 5.3% | 10.0% |
| | CLOSE TO WORK HOTEL | 15 | 26.3% | 50.0% |
| | PRICES SALES PROMOS | 2 | 3.5% | 6.7% |
| | ONE STOP SHOP | 2 | 3.5% | 6.7% |
| | NOT CROWDED | 1 | 1.8% | 3.3% |
| | MEETS NEEDS | 6 | 10.5% | 20.0% |
| | PARKING TRAFFIC | 1 | 1.8% | 3.3% |
| | CUSTOMER SERVICE | 6 | 10.5% | 20.0% |
| | EASY ACCESS | 5 | 8.8% | 16.7% |
| | LIKE SPECIFIC STORE | 3 | 5.3% | 10.0% |
| | PROXIMITY OTHER AREAS | 1 | 1.8% | 3.3% |
| | SUPPORT LOCAL | 1 | 1.8% | 3.3% |
| | DOWNTOWN FS | 5 | 8.8% | 16.7% |
| | GREENSPACE | 4 | 7.0% | 13.3% |
| | ACTIVITIES | 1 | 1.8% | 3.3% |
| Total | | 57 | 100.0% | 190.0% |

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**$Q21 Frequencies**

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| Q21. DISLIKE MOST ABOUT SHOPPING OPPORTUNITES IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 6 | 14.0% | 20.0% |
| | CUSTOMER SERVICE | 2 | 4.7% | 6.7% |
| | ACCESS | 2 | 4.7% | 6.7% |
| | SELECTION STORES | 10 | 23.3% | 33.3% |
| | SELECTION RESTAURANTS | 15 | 34.9% | 50.0% |
| | HOURS OF OPERATION | 4 | 9.3% | 13.3% |
| | LACKS ENTERTAINMENT | 1 | 2.3% | 3.3% |
| | NO MALL | 3 | 7.0% | 10.0% |
| Total | | 43 | 100.0% | 143.3% |

a. Group

**$Q22 Frequencies**

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| Q22. STORES SERVICES INCREASE SPENDING IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 1 | .9% | 3.3% |
| | WINNERS | 3 | 2.8% | 10.0% |
| | CLOTHING FOOTWEAR | 4 | 3.7% | 13.3% |
| | BOOKS MUSIC DVD | 5 | 4.6% | 16.7% |
| | ELECTRONICS COMPUTERS | 8 | 7.4% | 26.7% |
| | FURNISHINGS APPLIANCES | 1 | .9% | 3.3% |
| | SPORTING GOODS | 3 | 2.8% | 10.0% |
| | GROCERY DRUGSTORE | 3 | 2.8% | 10.0% |
| | HOME IMPROVEMENT GARDEN | 1 | .9% | 3.3% |
| | OFFICE SUPPLY ITEMS | 5 | 4.6% | 16.7% |
| | AUTOMOTIVE | 2 | 1.9% | 6.7% |
| | COFFEE CAFES FAST FOOD | 11 | 10.2% | 36.7% |
| | FULL SERVICE RESTAURANTS | 51 | 47.2% | 170.0% |
| | ENTERTAINMENT | 6 | 5.6% | 20.0% |
| | A MALL | 1 | .9% | 3.3% |
| | COSTCO | 3 | 2.8% | 10.0% |
| Total | | 108 | 100.0% | 360.0% |

a. Group

**Statistics**

| | | D1. HOUSEHOLD SIZE | D2. # HOUSEHOLD < 18 YEARS OLD |
|---|---|---|---|
| N | Valid | 30 | 30 |
| | Missing | 0 | 0 |
| Mean | | 3.10 | .73 |

D

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**D1. HOUSEHOLD SIZE**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 1 | 5 | 16.7 | 16.7 | 16.7 |
| | 2 | 8 | 26.7 | 26.7 | 43.3 |
| | 3 | 3 | 10.0 | 10.0 | 53.3 |
| | 4 | 8 | 26.7 | 26.7 | 80.0 |
| | 5 | 5 | 16.7 | 16.7 | 96.7 |
| | 6 | 1 | 3.3 | 3.3 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

**D2. # HOUSEHOLD < 18 YEARS OLD**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 0 | 21 | 70.0 | 70.0 | 70.0 |
| | 2 | 5 | 16.7 | 16.7 | 86.7 |
| | 3 | 4 | 13.3 | 13.3 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

**D3. RESPONDENT AGE**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 18-24 | 7 | 23.3 | 23.3 | 23.3 |
| | 25-34 | 5 | 16.7 | 16.7 | 40.0 |
| | 35-44 | 6 | 20.0 | 20.0 | 60.0 |
| | 45-54 | 7 | 23.3 | 23.3 | 83.3 |
| | 55-64 | 5 | 16.7 | 16.7 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

**D4. HOUSEHOLD YEARLY INCOME**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | $15,000-$24,999 | 1 | 3.3 | 3.3 | 3.3 |
| | $45,000-$54,999 | 1 | 3.3 | 3.3 | 6.7 |
| | $55,000-$64,999 | 3 | 10.0 | 10.0 | 16.7 |
| | $65,000-$74,999 | 4 | 13.3 | 13.3 | 30.0 |
| | $75,000-$99,999 | 4 | 13.3 | 13.3 | 43.3 |
| | $100,000-$124,999 | 8 | 26.7 | 26.7 | 70.0 |
| | $125,000+ | 9 | 30.0 | 30.0 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |

**D5. RESPONDENT GENDER**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | MALE | 28 | 93.3 | 93.3 | 93.3 |
| | FEMALE | 2 | 6.7 | 6.7 | 100.0 |
| | Total | 30 | 100.0 | 100.0 | |


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