City of Fort Saskatchewan

# Retail Market & Gap Analysis

**July 2019**

Prepared for the City of Fort Saskatchewan

Prepared by Key Planning Strategies

in collaboration with Colliers International Consulting & Keyfax Market Research

# RETAIL
## Market & Gap Analysis

City of Fort Saskatchewan
Alberta

Member of International Council of Shopping Centers

key planning strategies

Colliers INTERNATIONAL

keyfax market research

PO Box 85041 RPO Willoughby Centre | Langley, B.C. Canada | V2Y 0W3 | 604.314.3780 p

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# i PREFACE

Key Planning Strategies ("Key Planning") and Colliers International Consulting ("Colliers") was commissioned by the City of Fort Saskatchewan in April 2019 to conduct a Retail Market and Gap Analysis for the City. This initial study was carried out over the period April to July.

This study represents an ongoing update to previous studies conducted in 2014 and 2016.

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. Moreover, an objective is to illustrate changes that may have taken place in the City in terms of the inventory and overall trade area .

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.

This 2019 study provides 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, Local Commercial Developers International Council of Shopping Centers, Manifold Data Mining Inc, Cushing Terrell Architecture Inc, Key Planning Strategies and Colliers.

Key Planning 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 Key Planning and Colliers as objective and independent parties; and neither is 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 Key Planning, Colliers or the City of Fort Saskatchewan

*Key Planning Strategies, 2019*

# ii EXECUTIVE SUMMARY

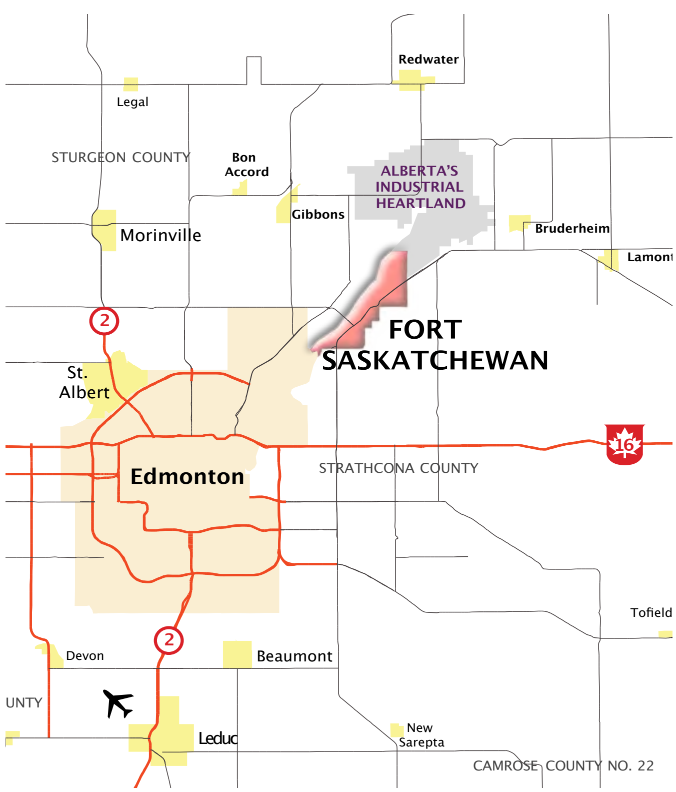
## INTRODUCTION

The objective of this study is to update and document in detail the City of Fort Saskatchewan's current retail inventory and update the estimated Trade Area and 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




Fort Saskatchewan has evolved over the past 5 years to become a recognized a regional-serving destination for communities to north and east where it serves as a critical and convenient catchment for shops and services for towns such as Lamont, Bruderheim, Redwater, Gibbons, Bon Accord, Smoky Lake, Ashmont, Two Hills. The City is even a destination, albeit less frequently, from communities such as Lac La Biche, Athabasca and Vegreville.

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

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. **Fort Saskatchewan has proven itself over the past 5 years as a major retail location where businesses can be attracted and succeed.**

Specifically, in conjunction withe the continued population growth of the City, the successful attraction of retail over the past 5 years has rapidly evolved the City from a local-serving destination to a regional-serving hub that caters to many communities to the north and east while at the same time has competed well against the emerging retail nodes in northeast Edmonton and Strathcona County.

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

# ii EXECUTIVE SUMMARY

communities north, west and east will still like the convenience and accessibility that Fort Saskatchewan provides for a critical mass of more necessity-based merchandise, while not discounting the need for more essential comparison items.

Fort Saskatchewan has shown a maturity in its retail growth that has enabled it to first and foremost retain a larger share of local spending, thus curbing retail sales outflow. This initial step must continue, but this strong retention has justified more regional attraction.

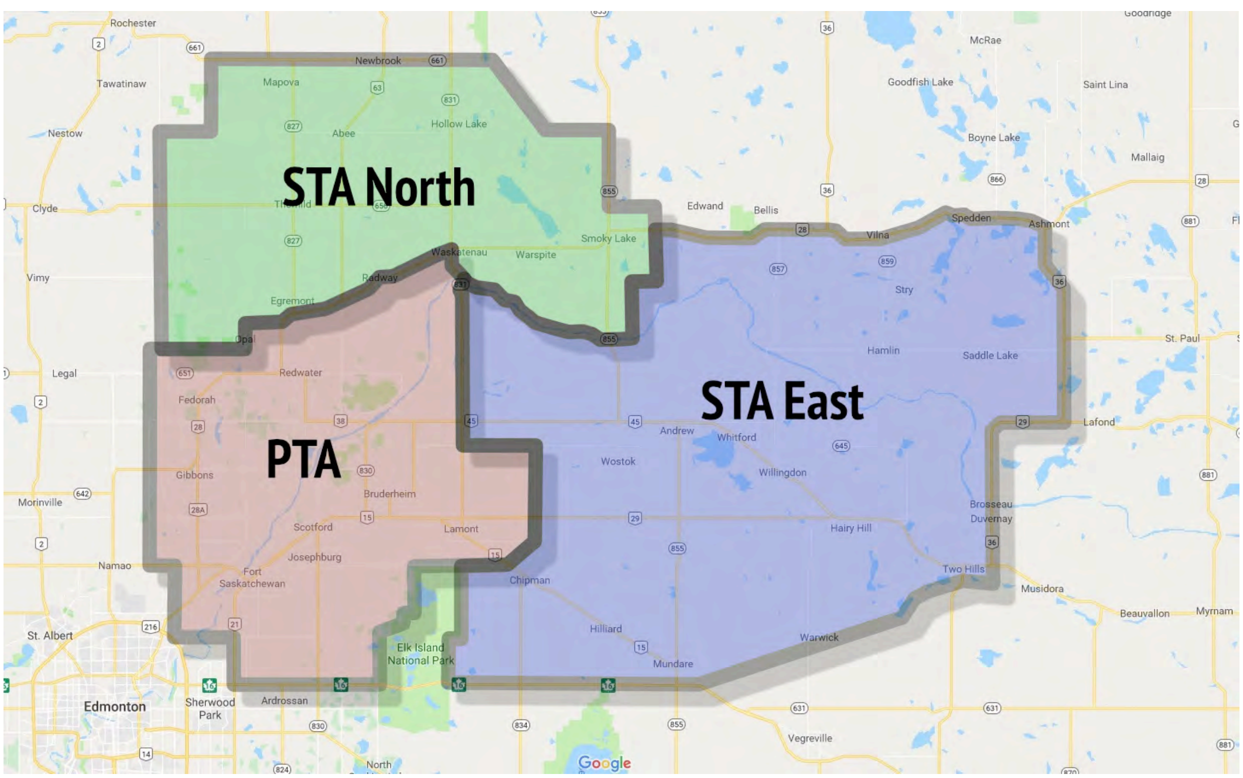
The Trade Area Demographic Profile illustrates a growing regional trade area that is forecast to increase from over 63,000 in 2018 to in excess of 97,000 over the next decade.

Fort Saskatchewan's strengths lie in its demographics, which are substantiated by a significant household income and population growth, well above the City of Edmonton average.

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 $1.2 Billion retail market (2018 Y/E estimates)** in which categories such as Grocery, Automotive/RV, Home Electronics & Appliances, Clothing/Footwear/Accessories and Restaurants represent significant spending segments.

## Retail Trade Area

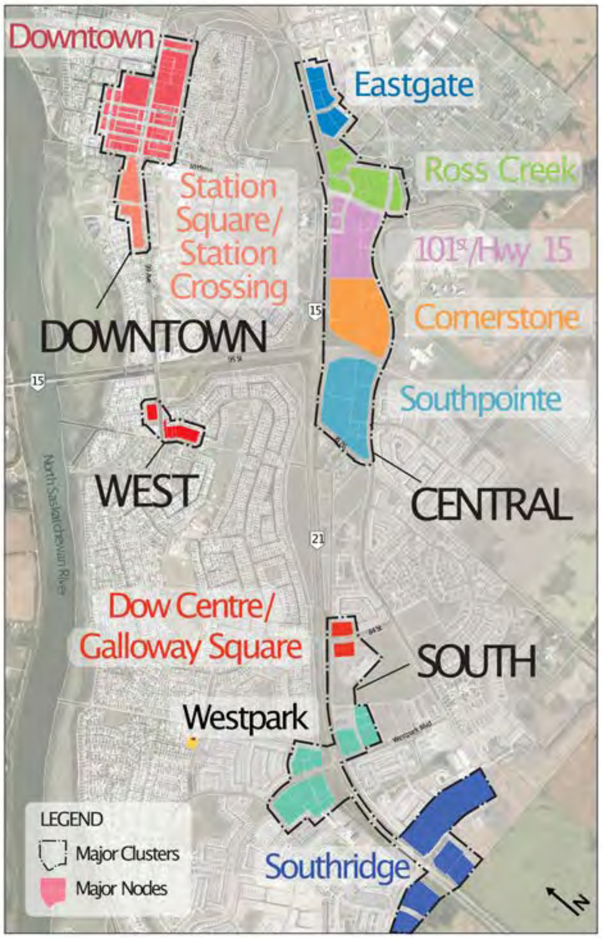





CITY OF FORT SASKATCHEWAN

# ii EXECUTIVE SUMMARY

## Retail Nodes




## Retail Inventory Summary

| | | |
|---|---|---|
| TOTAL | 1,508,889 | sq. ft. |
| TOTAL RETAIL ONLY | 1,305,121 | sq. ft. |
| VACANT NEW | 61,487 | sq. ft. |
| VACANT | 101,627 | sq. ft. |
| % VACANT (excluding VACANT NEW) | 4.1% | |
| % VACANT (ALL) | 10.8% | |

## RETAIL SUPPLY SUMMARY

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 1 hour drive, primarily north, northeast 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 1.30 million sq. ft. and a vacancy of just over 5.3%** (excluding new space actively being leased or under construction) which suggests a relatively 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 biggest threat to Fort Saskatchewan's retail outlook is the newer developing projects at Emerald Hills and Manning Town Centre, which survey respondents have indicated is their primary comparison shopping locale. 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.

Fort Saskatchewan is at a point in its growth where tenants should be targeted for quality over quantity and thus target very specific and desired tenants that match the gaps and demographic profile.

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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.

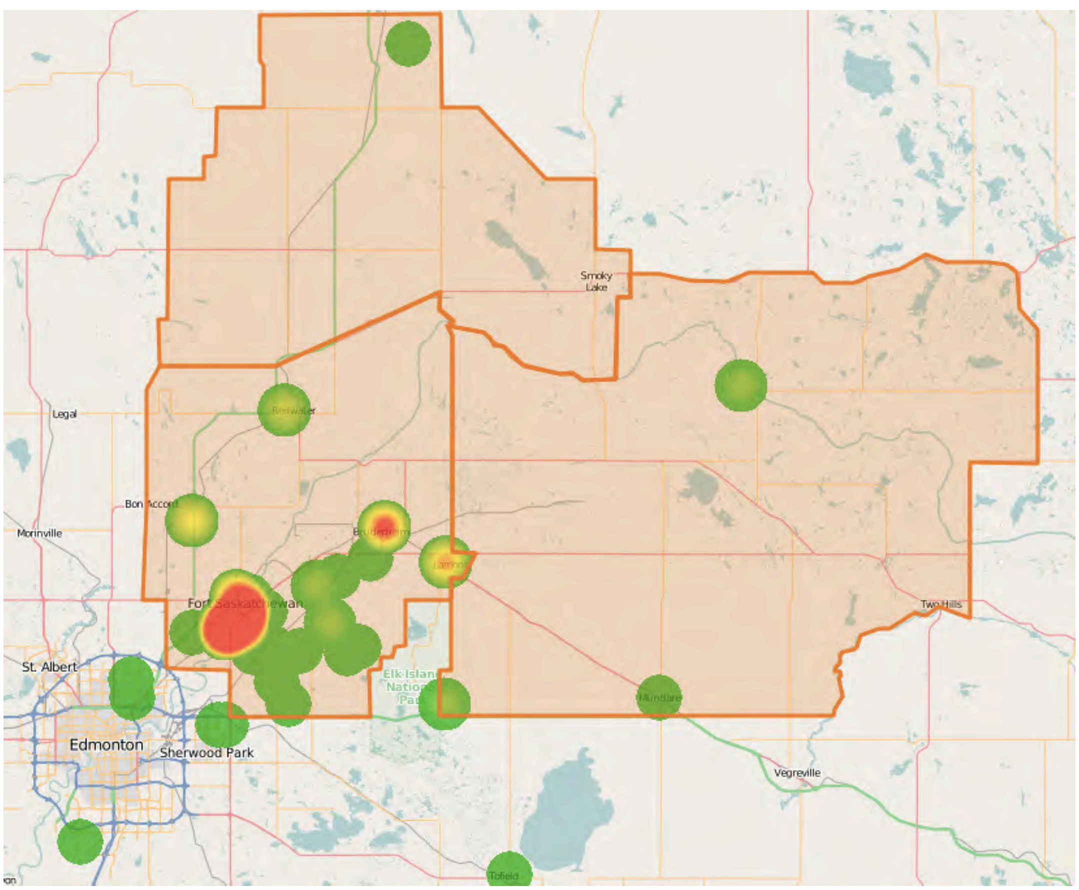
## RETAIL DEMAND SUMMARY

Total demand for floorspace in the City of Fort Saskatchewan attributable to residents of the Primary and Secondary Trade Areas and Miscellaneous Inflow at approximately 1,591,042 sq. ft.

When compared against the current city's occupied retail inventory or supply at 1,145,274 sq. ft., **the difference between demand and supply equates to almost 441,369 sq. ft. of retail space. In other words, the City has in the range of 440,000 sq. ft. unmet retail demand.**

If one factors into the equation forecasted population growth in the Primary Trade Area of approximately 19,323 over the next decade to 2028 (the majority of which will be in the City of Fort Saskatchewan), then estimated future floorspace demand could grow by approximately 386,460 sq. ft. (if applying a conservative per capita ratio of 20 sf per capita).

### Consumer Survey Respondent Origin Heat Map



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## Retail Demand - Outflow / Inflow Estimates

| MERCHANDISE CATEGORY | INVENTORY SQ. FT. | CURRENT ANNUAL RETAIL SALES (SUPPLY) | 2018 CITY OF FORT SASKATCHEWAN RETAIL EXPENDITURE (DEMAND) | (OUTFLOW) INFLOW SALES | FLOORSPACE DEMAND SQ. FT. | FLOORSPACE DIFFERENTIAL SQ. FT. (supply minus demand) | OUTFLOW INFLOW FACTOR (based on sales vs spending demand) |
|---|---|---|---|---|---|---|---|
| GROCERY & SPECIALTY FOODS | 230,222 | 113,860,463 | $109,184,760 | $4,675,703 | 220,768 | 9,454 | 2.1 |
| ALCOHOL & TOBACCO | 39,722 | 15,327,666 | $18,159,390 | ($2,831,724) | 47,061 | (7,339) | (8.5) |
| PHARMACY | 61,159 | 38,432,198 | $8,954,064 | $29,478,134 | 14,249 | 46,910 | 62.2 |
| PERSONAL SERVICES | 50,802 | 8,525,055 | $17,679,708 | ($9,154,653) | 105,355 | (54,553) | (34.9) |
| CLOTHING & APPAREL | 79,891 | 25,597,932 | $28,621,026 | ($3,023,094) | 89,326 | (9,435) | (5.6) |
| FOOTWEAR | 2,500 | 825,000 | $9,787,797 | ($8,962,797) | 29,660 | (27,160) | (84.5) |
| JEWELRY & ACCESSORIES | 6,019 | 3,468,713 | $5,367,870 | ($1,899,158) | 9,314 | (3,295) | (21.5) |
| HEALTH & BEAUTY | 11,199 | 4,239,408 | $10,724,319 | ($6,484,911) | 28,330 | (17,131) | (43.3) |
| HOME ELECTRONICS & APPLIANCES | 20,744 | 10,089,934 | $15,486,876 | ($5,396,942) | 31,840 | (11,096) | (21.1) |
| HOME FURNISHINGS & ACCESSORIES | 33,507 | 10,159,806 | $54,775,116 | ($44,615,310) | 180,649 | (147,142) | (68.7) |
| HOME IMPROVEMENT & GARDENING | 131,567 | 43,169,201 | $16,366,293 | $26,802,908 | 49,880 | 81,687 | 45.0 |
| BOOKS & MULTI-MEDIA | 1,000 | 250,000 | $16,594,713 | ($16,344,713) | 66,379 | (65,379) | (97.0) |
| SPORTING GOODS & OUTDOOR RECREATION | 21,976 | 6,243,900 | $4,020,192 | $2,223,708 | 14,149 | 7,826 | 21.7 |
| TOYS & HOBBIES | 12,698 | 3,880,847 | $4,180,086 | ($299,239) | 13,677 | (979) | (3.7) |
| SPECIALTY RETAIL | 88,472 | 22,625,163 | $6,635,601 | $15,989,562 | 25,947 | 62,525 | 54.6 |
| FULL SERVICE F&B | 65,878 | 24,647,610 | $30,699,648 | ($6,052,038) | 82,053 | (16,176) | (10.9) |
| LIMITED SERVICE F&B | 68,610 | 37,580,833 | $5,048,082 | $32,532,751 | 9,216 | 59,394 | 76.3 |
| DRINKING ESTABLISHMENT | 15,691 | 8,669,225 | $2,843,829 | $5,825,396 | 5,147 | 10,544 | 50.6 |
| ARTS & ENTERTAINMENT | 23,210 | 6,527,841 | $12,997,098 | ($6,469,257) | 46,212 | (23,002) | (33.1) |
| FITNESS & LEISURE | 46,300 | 10,297,500 | $5,836,131 | $4,461,369 | 26,241 | 20,059 | 27.7 |
| AUTO PARTS & ACCESSORIES | 60,243 | 24,747,281 | $8,154,594 | $16,592,687 | 19,851 | 40,392 | 50.4 |
| AUTO/RV/MOTORSPORTS DEALERSHIP | 60,764 | 29,777,237 | $97,204,131 | ($67,426,894) | 198,358 | (137,594) | (53.1) |
| VACANT | 101,627 | | | | | | |
| VACANT NEW | 61,487 | | | | | | |
| **TOTAL** | **1,295,288** | **$448,942,811** | **$489,321,324** | **-$40,378,513** | **1,313,662** | **-18,374** | **(4.3)** |

*** Grocery & Specialty Foods Includes Convenience Stores

In total, when considering residual demand plus future demand over the next decade, **the City of Fort Saskatchewan could grow by as much as 828,229 sq. ft. (441,369 sq. ft. + 386,460 sq. ft.) of new retail space.**

Cross-referencing the City's retail spending against the actual retail sales estimated for its current inventory yields an estimated total net sales outflow of $37 million dollars, which means the City must provide the necessary retail that corresponds with its growth locally and regionally as a growing retail and service hub.

When factoring future growth against the current 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.

As the City continues to grow and expand its market area penetration, the progression of retail will correspondingly create opportunities for retailers that may already have locations in areas like Emerald Hills, but for whom Fort Saskatchewan will now be seen as truly its own regional or quasi-regional retail market.

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## CONSUMER SURVEY SUMMARY

Fort Saskatchewan has rapidly evolved into becoming such a market, with a trade area that will reach almost 72,000 by 2023.

Although not specifically probed in the 2019 Survey, respondents did identify categories for which specific tenants could be identified, as they were in 2014.

This specific list includes the following ten (10) branded retailers that could fulfill the categories noted previously and have the most impact on retaining spending in Fort Saskatchewan:

1. **Costco (singled out by 8% of survey respondents)**
2. **Winners (singled out by 5% of respondents)**
3. **Indigo**
4. **Home Sense**
5. **Marshalls**
6. **Bouclair**
7. **Sport Chek**
8. **The Keg**
9. **Earl's**
10. **Brown's Social House**

Cafes and coffee shops continue to be in high demand with optimal locations available throughout the City. Downtown in particular is sought after for a cafe or coffee shop/specialty retail/bakery type of concept. This suggests opportunities for more local independents, for whom the Downtown core could be strong.

Since 2014, the role of online spending and omni-channel retail has surged. However, while the fear that online retailing will usurp or be the death of physical bricks and mortar retail is often overstated, it is nonetheless a factor that retailers and communities must be aware of since it can affect retailers' locational and physical store network strategy.

**Overall, survey respondents revealed that they spend an average of 51.4% of their spending inside Fort Saskatchewan, 41.6% outside of Fort Saskatchewan and 7.1% online.**

Not unexpectedly, respondents spend most of their convenience purchases inside Fort Saskatchewan where proximity and price are paramount. In general, most purchases made outside of Fort Saskatchewan continue to be in the DSTM or Comparison segments.

Fort Saskatchewan is well positioned to attract new-to-market retailers, some of whom may already have locations in northeast Edmonton at Emerald Hills and/or Manning Town Centre.

Specifically though, Fort Saskatchewan should use the Consumer Survey trends that suggest targeting the quality of tenants over the quantity of retailers thereby infill existing retail nodes and 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 Downtown is the ideal location to house Specialty Retail, independent Full Service Restaurants and Cafes.

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.

# ii EXECUTIVE SUMMARY

## CONCLUSION

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 63,000 residents and is forecast to pass 82,000 by 2028.
- The City of Fort Saskatchewan currently has approximately 1.30 million sq. ft. of total retail space with a vacancy of only 5.3% (excluding new and under construction).
- The City currently has residual demand for approximately 445,000 sq. ft.
- Future growth forecasts suggest the City could conservatively accommodate an additional 386,000 sq. ft. of new retail space by 2028 (not including residual demand).
- Competitive influences from neighbouring areas to the south will continue, particularly Emerald Hills and Manning Town Centre although it is expected that Fort Saskatchewan's location and regional draw to the north and northeast will provide a stable environment for attracting retail that may already have locations in Emerald Hills or Manning Town Centre.
- Fort Saskatchewan's retail inventory is well-positioned to provide community scale appeal for day-to-day necessities as well as casual comparison items such as everyday Apparel, Sporting Goods and Toys & Hobbies.

Since 2014, when the original study was undertaken, Fort Saskatchewan has been continued to establish itself as a regional hub. While the City's population has continued to grow at healthy rates with corresponding spending growth, the performance of the existing retail has stayed relatively the same and with the increasing competition occurring south in northeast Edmonton, the City now has sales outflow from its residents.

Although Fort Saskatchewan's trade area has been increased from the original 2014 study, the City's productivity and core sales still largely emanates from its local region.

- Fort Saskatchewan has a net sales outflow of $37 million (Y/E 2018 estimate), comprising predominantly comparison categories.
- Fort Saskatchewan does a very good job of retaining and attracting Convenience Spending with a net inflow of $22 million.
- Fort Saskatchewan garners strong inflow from Limited Service Restaurants ($32.7 million) and Home Improvement ($26.8 million).
- Fort Saskatchewan's Primary Trade Area penetration of the Full-Service Restaurant category could be stronger (currently at an estimated 50%).

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- Fort Saskatchewan's major leakage occurs in Auto/RV/Motorsports ($67.4 million), Home Furnishings ($44.6 million), Books & Media ($16.3 million), Fashion ($13.9 million), Arts & Entertainment ($6.5 million) and Full Service Restaurants ($6.1 million).
- Consumer Survey Respondents would like to see more Full-Service Restaurants, Clothing & Footwear and Sporting Goods, Toys & Hobbies 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.

**The Top 5 tenant prospects based on a combination of market readiness and consumer sentiment are:**

1. **Winners or Marshalls**
2. **Sport Chek**
3. **Home Sense**
4. **Real Canadian Superstore**
5. **Brown's Social House**

**Table 9.1** provides a more detailed list of potential tenant prospects for Fort Saskatchewan along with an estimated timeline as to whether they are short term (next 5 years) or longer term targets (5 to 10 years).

Bigger ticket items such as Auto and Recreational Vehicles as well as Comparison categories (or Department Store Type Merchandise DSTM) will still exhibit outflow dollars from the community and this will likely be the case over the next 5-10 years as Fort Saskatchewan continues to evolve as its own regional hub for retail and services.

**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 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 2028.

# 1 introduction

1.1
## SCOPE OF STUDY & PROJECT BACKGROUND

Key Planning Strategies ("Key Planning") in collaboration with Colliers International Consulting ("Colliers") was commissioned by the City of Fort Saskatchewan in April 2019 to conduct a Retail Gap Analysis for the City and its various retail areas/nodes, including a detailed profile of the Downtown retail environment.

The study was carried out over the period of April to July 2019.

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

This study further represents an update to previous studies undertaken in 2014 and 2016 as well as a Citywide Non-Residential Real Estate Inventory conducted in 2018 by Key Planning and Colliers.

1.2
## REPORT STRUCTURE

Key Planning and Colliers conducted detailed fieldwork in 2018 and 2018 to solidify an understanding of existing and future retail projects and prospects in Fort Saskatchewan as well as changes in the retail environment over the period 2014 to the present day. 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.

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 -** Provides a summary of the key retail trends driving retail development and operations Nationally, as well as Provincially.

**Section 3 - 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 4 - Retail Trade Area Profile:**
Identifies and defines the Primary and Secondary Retail Trade Areas and documents the population and expenditure profiles generated, against which estimates of floorspace demand can be attributed.

**Section 5 - 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.

**Section 6 – 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.

Photo credit: Kieron Hunt

Photo credit: Kieron Hunt

**Section 7 – Downtown Analysis:**
Provides a deeper dive into the composition of Fort Saskatchewan's Downtown streetfront retail and commercial mix to determine specific voids and opportunities. Further it includes survey results obtained from Stakeholder meetings as well as from on-the-ground Consumer Intercept Survey results.

**Section 8 – Consumer Intercept Survey:**
A Consumer Intercept Survey was conducted by Keyfax Market Research in which residents of Fort Saskatchewan and surrounding communities were interviewed randomly at various locations, dates and times in the community over a one week period. An in-person questionnaire tool was used to ascertain shopping patterns and consumer preferences, along with their 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 9 – 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:

- Downtown Business and Property Owner Consultation Report, 2017
- City of Fort Saskatchewan Growth Study, 2015
- City of Fort Saskatchewan Strategic Plan 2018-2022
- City of Fort Saskatchewan Municipal Development Plan, 2010-2030
- City of Fort Saskatchewan Downtown Area Redevelopment Plan, 2009
- City of Fort Saskatchewan Municipal Census, 2019
- City of Fort Saskatchewan Land Use Bylaw
- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume 2019
- Manifold Data Mining, 2019
- Keyfax Market Research Consumer Intercept Survey, May 2019
- Key Planning Strategies and Colliers International Consulting Detailed Retail Inventory Fieldwork, April 2019
- Retail Brokerage & Developer Project Profiles (Colliers, Cushman Wakefield, Qualico, Melcor, Avison Young, ReMax, NAI Commercial)

1.4
## GLOSSARY OF ACRONYMS

- AADT - Average Annual Daily Traffic
- ARP - Area Redevelopment Plan
- CMA - Census Metropolitan Area
- DSTM - Department Store Type Merchandise
- ICSC - International Council of Shopping Centres
- MDP - Municipal Development Plan
- NAICS - North American Industry Classification System
- PTA - Primary Trade Area
- STA - Secondary Trade Area

# 2 retail trends

## 2.1
## INTRODUCTION

A key component in estimating total retail floorspace demand and formulating overall development recommendations is generating an understanding of evolving retail trends.

## 2.2
## RETAIL SALES GROWTH BY SUB-CATEGORY

As displayed in **Figures 2.1 & 2.2**, although total Canadian retail sales grew by 19.6% ($1.9 billion) between 2011 and 2016, performance by NAICS subcategory has varied widely both nationally and in Alberta (refer to **Figure 2.2**).

***Specialty Food vs. Traditional Grocery Stores***

Both nationally as well as in Alberta, specialty food stores experienced significantly higher growth when compared to traditional grocery stores over the 2011-2016 period, registering respective growth rates of 29.4% and 14.6%. During this period, sales in Alberta's traditional grocery stores experienced slightly negative sales growth (-1.6%). This suggests that the growing health and wellness trends in Canada have supported the expansion of niche and sometimes higher end grocery sales at smaller specialty food stores.

Despite this, it is expected that there will still be significant square footage demand for traditional grocery stores moving forward, particularly if they evolve their product offerings to meet consumer demands.

Figure 2.1

### PER CAPITA RETAIL SALES GROWTH - NATIONAL


Figure 2.2

### PER CAPITA RETAIL SALES GROWTH - ALBERTA




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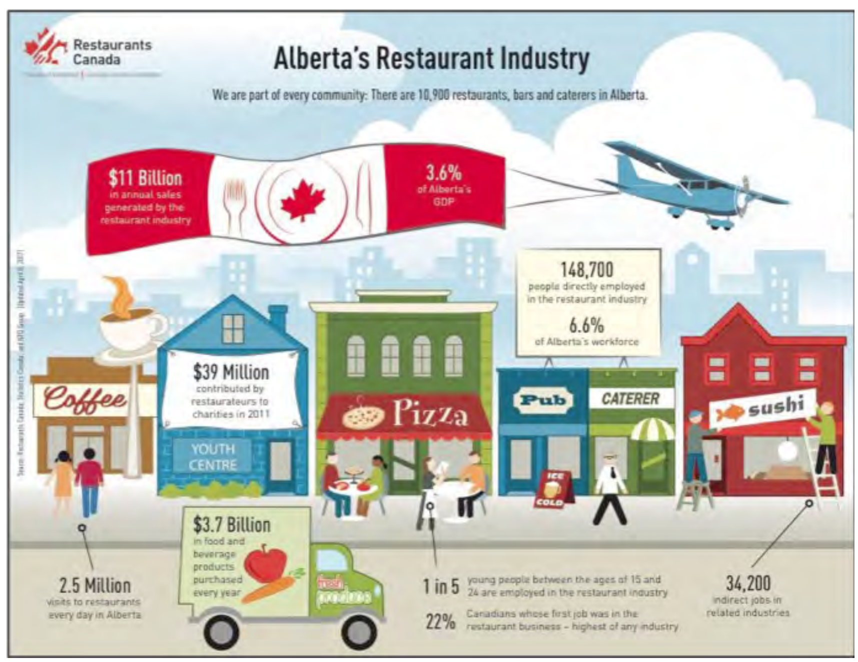
Traditional grocery stores that do not adapt to modern consumer preferences (local, high quality, organic, prepared meals, specialty foods, etc.) will struggle to keep up. In recent years, some of Canada's supermarket chains that haven't adapted have been impacted by the growing competitive influence of general merchandisers such as Costco, Walmart, and The Real Canadian Superstore.


***Quick-Service and Full-Service Restaurants***

In Alberta, both quick-service and full-service restaurant sales grew at notable levels from 2011 to 2016, registering increases in per capita sales of $142 (17.4% growth) and $107 (10.9% growth), respectively. Millennials are driving a significant portion of this demand as they advance their careers and earn more disposable income. Compared to baby-boomers, eating out is a norm for millennials who are more demanding and adventurous with their dining choices, often preferring to spend their hard-earned money on distinctive taste experiences than on personal automobiles or other items traditionally considered "non-discretionary".




Studies such as the Online Survey of Millennials (2017) have shown that more than half of millennials prefer to shop or dine in a unique or historic downtown venue rather than in chain restaurants or enclosed malls. This has led to the rise of healthy, fast casual restaurants such as Nando's and Freshii, as well as the popularity of independent full-service restaurants offering unique menus in attractive dining environments, particularly when they are located in inviting and accessible urban settings.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There has also been a growing demand for food halls, food trucks, and container clusters, all of which are preferable over the standard food court of yesterday's malls.


***Footwear and Apparel***

In recent years there has been a growing polarization of clothing sales with relatively strong performance in the luxury and value sectors, and poor performance in the mid-price sector. Luxury sales have benefited strongly from the expansion of high-end department stores with Saks Fifth Avenue and Nordstrom recently opening new stores in Canada, and Holt Renfrew expanding its network.

Conversely, for the average consumer, growing living costs and negligible wage increases have resulted in more careful planning of household expenditures.

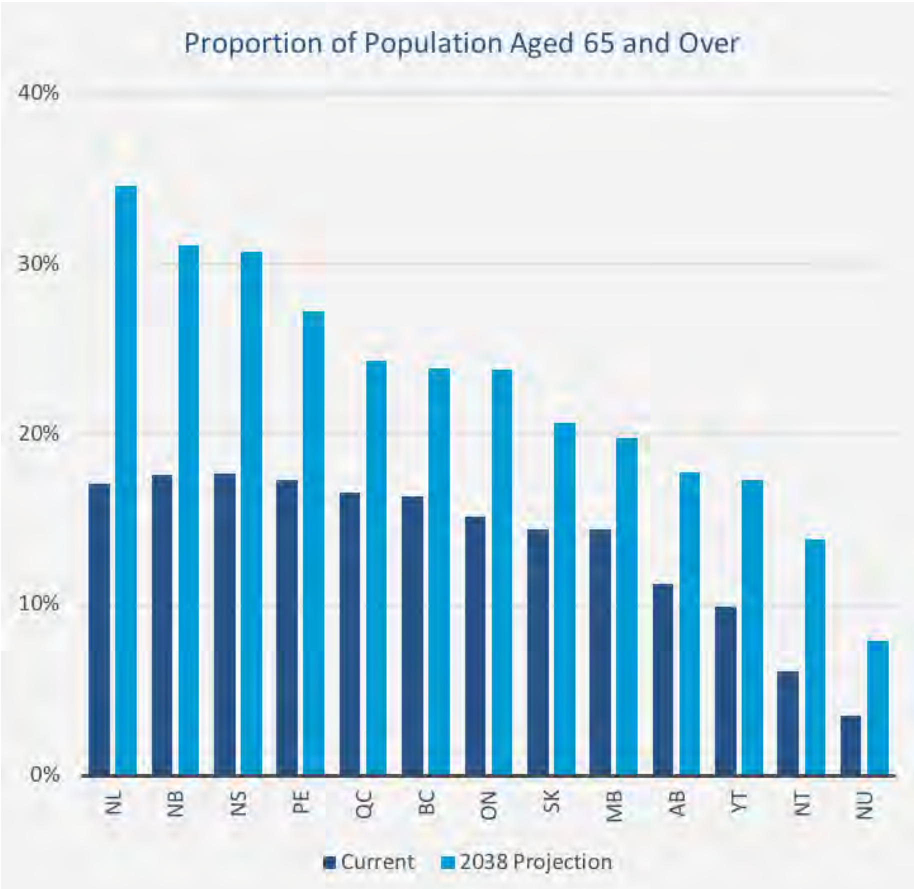

This has led to the growing popularity of affordable fast casual clothing chains such as H&M, Zara, and Uniqlo. Furthermore, the athleisure trend has been growing in Canada for many years, with a significant proportion of consumers now preferring a more understated, casual, and comfortable wardrobe. This has had an impact beyond sportswear brands as well, with an increasing number of retailers offering sports-inspired styling from fast fashion brands such as H&M to luxury brands such as Versace.

***Health and Personal Care Stores***

Health and personal care stores led the way in terms of absolute per capita retail sales growth from 2011 to 2016, growing by $433 per capita (58%). This trend is directly correlated to an aging national population as shown in **Figure 2.3**.

Figure 2.3

## PROPORTION OF POPULATION AGED 65 AND OVER - NATIONAL TREND




Included in this category are pharmacies, cosmetic goods, optical goods, fitness/health supplements, and other related stores. Due to the large population of baby boomers entering the 65 and over age group, and a rising awareness of emerging health conditions, there has been an increased demand for over the counter supplements, vitamins, and medication sold at retailers such as Shoppers Drug Mart.

Furthermore, public health initiatives continue to engage and educate Canadians by highlighting the risks of prevalent health issues such as smoking, obesity, and the importance of exercise and diet to combat the rising rates of diabetes, heart disease and strokes.

Now with the availability of food, personal care, and home products, drugstores and pharmacies such as Rexall, Jean Coutu and Shoppers Drug Mart provide Canadians with a one-stop shop where they can pick up many of their everyday goods. The increasing focus on the importance of fitness has also contributed to the popularity of boutique fitness studios (cross-fit, spin class, yoga) and health/fitness supplement stores.

***Electronics and Appliances***

Although electronics and appliances were the worst performing subcategory between 2011 and 2016 in Alberta, with a total reduction of -$182 (-26%) in per capita retail sales, success has varied widely depending on product type and the bricks-and-mortar retail environment.

Due to the higher costs, and relatively stagnant innovation of items such as computers, televisions, cell phones, and large household appliances, consumers are less likely to purchase these as often as they once were. Gone are the days where a new computer, phone, or television becomes obsolete the next year due to a rapid innovation in the industry and the release of significantly superior product types.

When purchasing these larger and more expensive products, consumers are likely to research product reviews and prices on-line, test them out in a physical store, and then purchase them either in-store or on-line depending on where they can find the best price.

Other items that consumers may be likely to try out in-store before making a final purchase decision include wearables, VR headsets, smart home speakers, and similar high-growth items. Conversely, the product types that have experienced the largest drop in sales, particularly in bricks-and-mortar stores, are items such as digital media, video games, computer parts and accessories, office supplies, and small household appliances. The demand for a strong bricks-and-mortar electronics store presence varies among different age cohorts.

Millennials and younger generations well-versed with technology are often more knowledgeable and educated regarding their purchase decisions than in-store sales staff. These consumers are more likely to utilize bricks-and-mortar stores primarily to physically try out and choose between a few comparable product options. Alternatively, older age cohorts demand a stronger customer service experience and are likely to turn to the advice of sales staff to better inform themselves regarding the products most suitable for their needs. These consumers are more likely to purchase items in-store, and in some cases, may pay extra for services such as home-installation.

***Home Furnishings and Building Materials***

Retailers offering home furnishings and building materials have also experienced notable growth in recent years. The robust performance of this sector has been caused by a variety of factors, including economic growth, residential construction activity, increased home sales, and high real estate prices.



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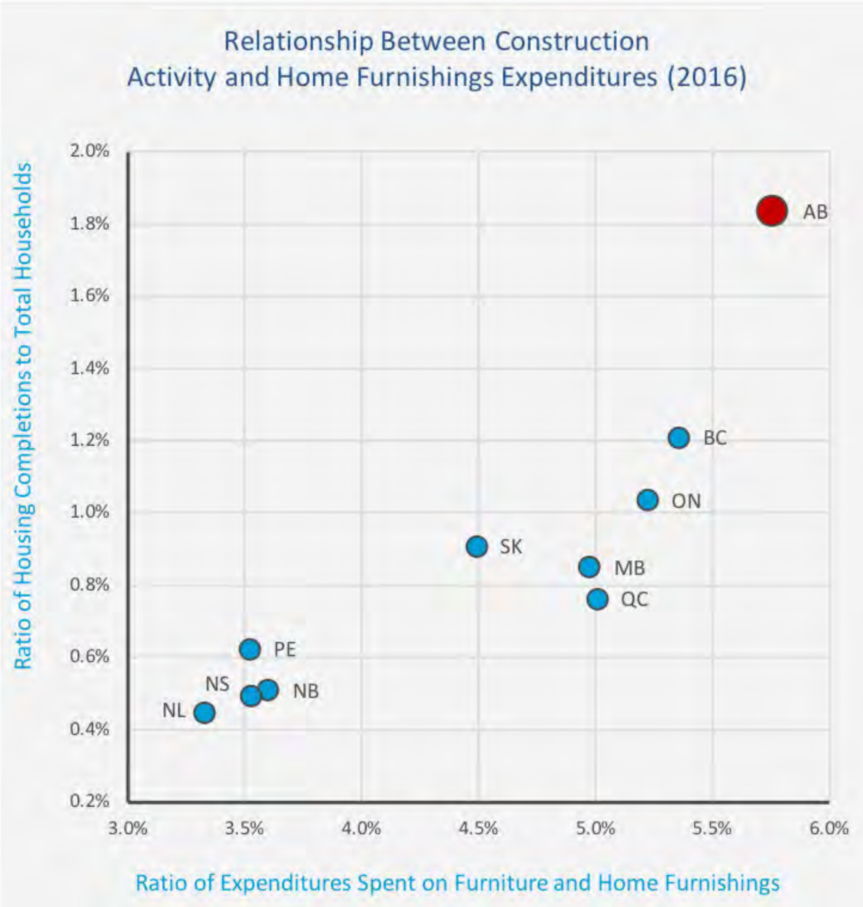
Figure 2.4
## RELATIONSHIP BETWEEN CONSTRUCTION ACTIVITY & HOME FURNISHINGS EXPENDITURES




As shown in **Figure 2.4**, there is a strong correlation between home furnishings sales and construction activity. Provinces such as Alberta and British Columbia, which experienced significant housing completions in 2016, also had a larger amount of home furnishings expenditures compared to provinces such as Nova Scotia and Newfoundland, which had relatively less development activity.

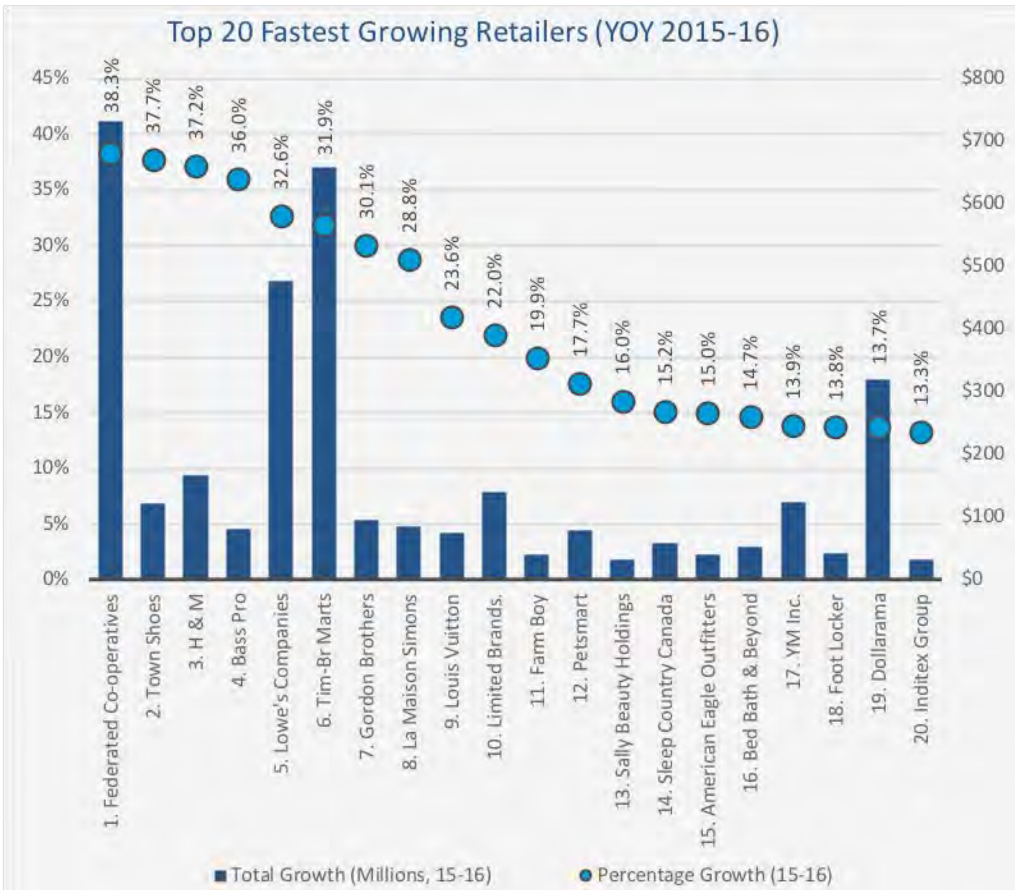
2.3
## TOP 20 FASTEST GROWING RETAILERS

**Figure 2.5** displays Canada's top 20 fastest growing corporate retail owners by year-over-year growth between 2015 and 2016. Leading the list is Federated Co-operatives Limited (38.3%, $731 million), followed by Town Shoes Ltd. (37.7%, $122 million), and H&M (37.2%, $166 million).

Despite the generally slow growth of traditional supermarkets, Co-op has managed to perform well, partially due to its popular membership program which has the effect of increasing customer loyalty and expanding the trade area when compared to comparable chains.
The growth of H&M, as well as other fast casual companies such the Inditex Group (Zara, Zara Home, Massimo Dutti, 13.3%, $33 million) demonstrate the growing popularity of lifestyle brands.

The strong performance of the building materials and home furnishings sectors in Canada's major cities have also been contributors to the strong growth of companies such as Tim-Br Marts (31.9%, $658 million) and Lowe's (32.6%, $477 million).

Figure 2.5
## TOP 20 FASTEST GROWING RETAILERS IN CANADA




2.4
## CANADA'S MOST TRUSTED BRANDS

**Figure 2.6** displays Canada's most trusted bricks-and-mortar and e-commerce brands, as identified through a market survey of more than 5,000 Canadian consumers. Unsurprisingly, Amazon dominated the list of most trusted e-commerce retailers, with Best Buy, Sephora, PetSmart, and The Home Depot all ranking high in the study as well. Generally, the most reputable bricks & mortar retailers are junior big box formats including Best Buy, PetSmart, Sport Chek, and Shoppers Drug Mart.

Canadians reported that their trust in brands is increased by personal experience, responsiveness, transparency, fair pricing, and the endorsements of other consumers, with on-line reviews being more important now than ever. Many survey respondents indicated that they now seek reviews to support their purchase decisions, and 85% of respondents stated that their trust in a brand increases if the brand has won awards based on the feedback of consumers.

Figure 2.6

## MOST TRUSTED RETAILERS IN CANADA - PHYSICAL & ON-LINE STORES

| Retail Category | Most Trusted Bricks-and Mortar Retailers | Most Trusted E-Commerce Retailers |
|---|---|---|
| Auto Parts & Accessories | Canadian Tire | Amazon, Canadian Tire (tie) |
| Baby/Childrens Clothing | Osh Kosh | Osh Kosh, Old Navy (tie) |
| Baby Goods | Walmart, Toys “R” Us (tie) | Amazon |
| Beauty/Cosmetics | Shoppers Drug Mart | Sephora |
| Books | Chapters Indigo | Amazon |
| Electronic Video Games | Best Buy | Amazon |
| Electronics | Best Buy | Amazon |
| Eyewear/Contacts | Clearly, Costco, Lenscrafters | Cleary |
| Furniture | Ikea, Leon’s, The Brick (tie) | Wayfair |
| Health & Wellness | Shoppers Drug Mart | Amazon |
| Home Appliances | The Home Depot | Amazon |
| Home Décor | HomeSense | Wayfair |
| Home Improvement | The Home Depot | The Home Depot |
| Houseware | Walmart | Amazon |
| Laptop/Desktop Computers | Best Buy | Best Buy, Dell (tie) |
| Men’s Clothing | Mark’s | Amazon, The Bay (tie) |
| Personal Care | Shoppers Drug Mart | Amazon |
| Pet Supply | PetSmart | Amazon |
| Sporting Goods | Sport Chek | Sport Chek |
| Toys/Games | Toys “R” Us | Amazon, Toys “R” Us (tie) |
| Travel/Accommodation | Flight Centre | Expedia |
| Women’s Clothing | Winners, Walmart, Reitmans | The Bay, Old Navy (tie) |

2.5

## CHANGES IN FLOOR AREA SHARE BY CATEGORY

Although retail sales by subcategory are one of the indicators of retail floorspace demand, growth and contraction trends from a square footage perspective are also helpful in generating a thorough understanding of emerging retail patterns. **Figure 2.7** displays the five-year change in the average square footage share of each retail subcategory in Canadian malls.

During this period, health and beauty stores experienced the largest growth in overall mall square footage share (0.9% growth) followed by specialty apparel (0.7% growth), and full-service restaurants (0.6% growth). Conversely, men’s, family, and women’s apparel all experienced a loss of total mall square footage, registering respective changes of -0.5%, -1.2%, and -2.1%.

In newer class A malls, the share of floorspace dedicated to apparel is now down to the low 40s, which is significantly lower than the 2011 Canadian average of 62%.

Many mall owners are instead seeking to boost their food and beverage offerings up to approximately 20% of total floorspace, due to the experiential and destination characteristics of strong dining options. In some instances, this has involved re-purposing under-performing retail space for new food and beverage tenants rather than traditional apparel tenants.

2.6

## THE IMPACT OF ONLINE SHOPPING ON BRICKS-AND-MORTAR

**Figure 2.8** displays the breakdown of 2016 Canadian on-line sales as a percentage of total retail sales.



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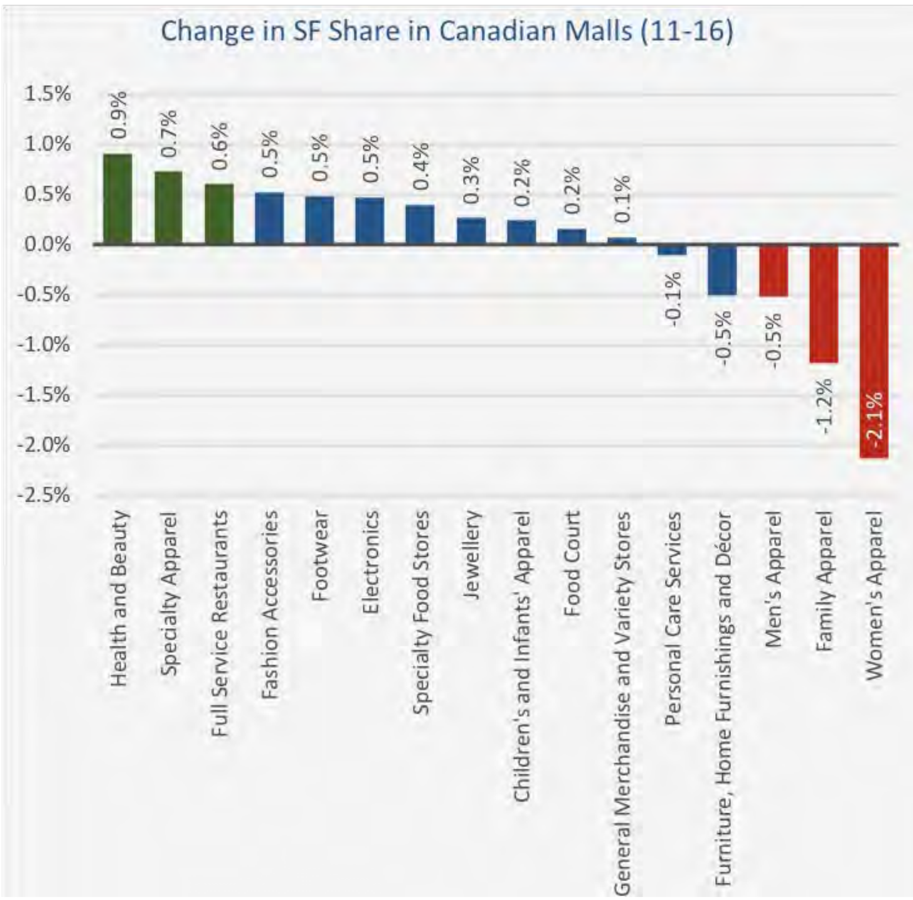
Figure 2.7

## CHANGE IN SQUARE FOOTAGE SHARE OF CATEGORIES IN CANADIAN MALLS




Leading the way was sports, books, & music with $540.3 million in total on-line sales accounting for 4.3% of total annual sales ($12.7 billion). On-line electronics sales accounted for 3.4% ($563.1 million) of the total $16.9 billion spent in 2016. Clothing and accessories ranked third, accounting for 2.7% ($859.6 million) of the total $32 billion spent in 2016. The subcategories least likely to be purchased on-line were health and personal care products (0.4%, $147 million), general merchandise (0.3%, $197.1 million), and food & beverage (0.2%, $208.1 million).

Rather than being replaced altogether by on-line competition, successful bricks-and-mortar retailers are instead evolving to move forward and, in some ways, benefit from the growing on-line marketplace.

More so now than ever, the true value of the most successful bricks-and-mortar retailers goes far beyond the direct sales generated within them as people still, and will always, want to see and touch much of what they are buying.



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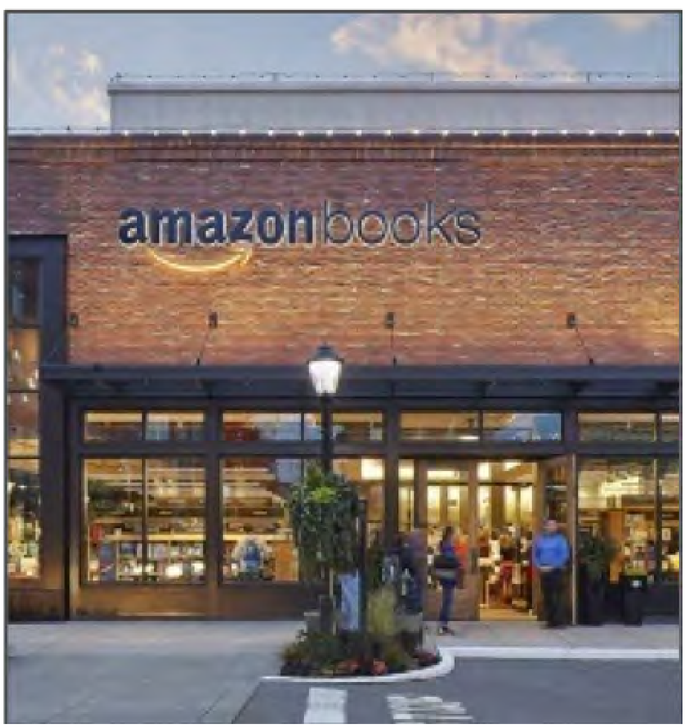
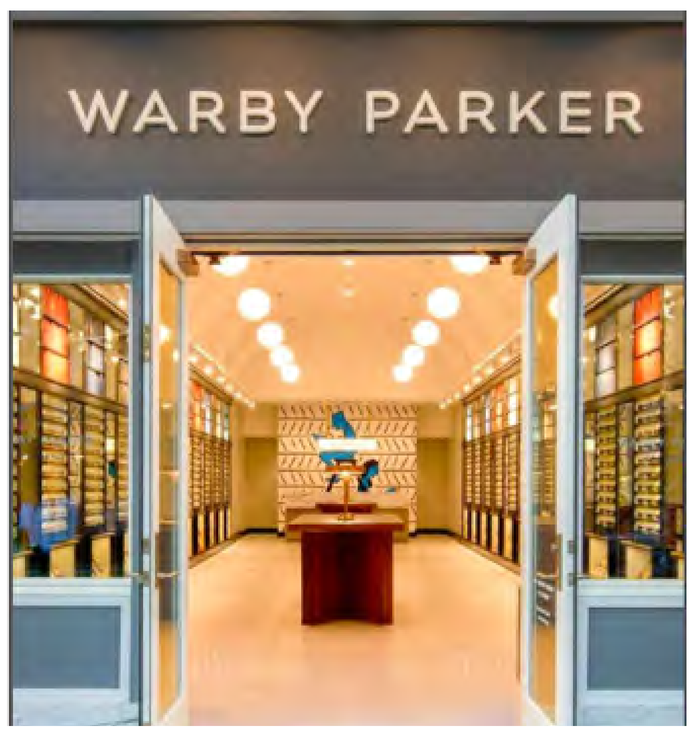
Figure 2.8
## ON-LINE SALES AS A PERCENTAGE OF TOTAL RETAIL SALES (2016)

It is becoming increasingly common for consumers to browse for items in a store before buying them on-line, collect on-line purchases from physical store locations, and purchase goods on-line while in a store using a mobile application or in-store kiosk.

Similarly, it is becoming more common for retailers that have started with a pure on-line presence to begin opening new, usually small format, bricks-and-mortar stores. For example, Vancouver based Indochino which started as a pure-play on-line retailer in 2007 has since opened more than 15 bricks-and-mortar showroom locations.

This has often resulted in a demonstrated 'halo effect' for on-line retailers even when they open stores in locations where their on-line sales are already strong. Instead of simply detracting from the spending that would normally be done on-line, the presence of the physical store tends to increase the total spending generated in that location across all platforms. People will continue to seek an experience when shopping, so there will always be a demand for bricks-and-mortar stores.

There will likely be a continuing trend towards the introduction of more physical store locations by on-line retailers as well as relatively small showrooms where people can touch and feel their goods before ordering a specific size, colour, material, etc. on-line.

In response to the growing threat of e-Commerce, retailers must be on top of the omni-channel retail world to stay competitive, and those who have not adapted have already failed or are unlikely to survive much longer. More recently, investment in mobile websites has become increasingly important, technology such as interactive displays and augmented reality has helped to create a more immersive retail experience, and the use of social media advertising campaigns has grown in popularity.

Rather than investing in expensive advertisements, some of the more effective methods of promoting products, sales, and new inventory has been through social media's influence. Although there will always be the demand for bricks-and-mortar stores, in response to the growing on-line marketplace their function will need to evolve from simply enabling transactions to actively marketing the brand while interacting with consumers in ways that cannot be replicated on-line.

## 2.7 MOVING FORWARD

Despite the rapid growth of on-line shopping, there will still always be demand for bricks-and-mortar retail space. The role of physical retail however will need to change moving forward, as consumers that could otherwise make a purchase on-line will be seeking a true experience. 'Lifestyle', 'retailtainment', 'place-making', and 'omni-channel' will be the key underlying themes as they relate to the future success of current retail centres and new retail developments.

Figure 2.9
## IMPACT OF NON-RETAIL MALL COMPONENTS


Consumers are expected to continue to prefer the physical component of trying out goods before making a purchase, however physical stores must adapt quickly to cater to the needs of modern shoppers. Retailers will continue to be successful if they deliver a reason to spend more time and dollars in physical stores. Studies have shown that shopping centres that have strong non-retail components facilitate increased dwell times, visitation frequencies, and spending per visit.

Many modern consumers shop across a variety of platforms, using a combination of stores and on-line channels to complete their purchases, and are increasingly demanding and contemplative in their shopping habits. Additionally, consumer spending is becoming increasingly weighted towards non-discretionary spending and experiential retail (grocery, cafes, restaurants, entertainment) when compared to discretionary spending (apparel, department stores, etc.)

Moving forward, the most successful retailers will respond to the rise of digital channels and evolving consumer preferences in a multitude of ways.

First of all, retailers will need to implement an internet-enabled hub-and spoke model, where they have a few flagship stores in key markets, smaller stores/showrooms selling a limited number of products with in-store on-line ordering options, and a comprehensive on-line platform.

The physical store locations must have in-store experiential attractions that draw in shoppers. This could include event programming such as fashion shows and holiday performances, and social spaces like coffee shops or wine bars.

It is important to create a relaxing environment where shoppers are encouraged to linger longer. Seamless connectivity among buying options is also important. Options including click-and-collect, on-line reservations, and in-store on-line ordering via kiosks will be crucial, giving consumers the option to buy anything, anytime, anywhere.

Entertainment is also a key aspect that will contribute to the success of shopping centres moving forward, specifically with 'grown up' offerings catering to the working millennial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population after working hours.
In addition to the importance of strong dining options and movie theatres, the most successful centres will offer additional entertainment concepts. One interesting example is Pinstripes, which features a social environment with numerous entertainment options including bowling, bocce ball, high quality dining, and a bar. Art galleries, comedy shows, and other live performances are additional examples that could help to attract stronger evening footfall.

As retailers seek new ways to draw customers to their stores, tenants will change their space requirements and landlords will need to become more flexible. Smaller retailers and new bricks and mortar e-commerce brands will seek landlords who are flexible with tenant improvements and understand their business model.

Landlords may benefit by filling temporary vacancies with pop-up shops, short-term rentals, and shorter lease terms. This has been proven to draw more customers, increase overall engagement with their properties, and create more experiences for the surrounding community, all of which is generally mutually beneficial for both landlords and tenants.


Moving forward, the most successful omni-channel retailers will be those that provide consumers with the following options:

- Purchase goods in-store.
- Research goods on-line and purchase in store.
- Research and purchase goods on-line and pick up in store.
- Touch, test, and try out goods in store, and purchase a specific size, colour, or material using an interactive kiosk.

# 3 location & context

3.1
## 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.

3.2
## 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, yet also creates 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 has continued to evolve and services a trading area in excess of 60,000 people spanning the City itself and neighbouring counties such as Sturgeon, Bruderheim, Gibbons, Thorhild and Lamont.

Fort Saskatchewan has evolved over the past 5 years to become a recognized a regional-serving destination for communities to north and east (refer to **Figures 3.1 & 3.2**) where it serves as a critical and convenient catchment for shops and services for towns such as Lamont, Bruderheim, Redwater, Gibbons, Bon Accord, Smoky Lake, Ashmont, Two Hills. The City is even a destination, albeit less frequently, from communities such as Lac La Biche, Athabasca and Vegreville.

3.3
## 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.



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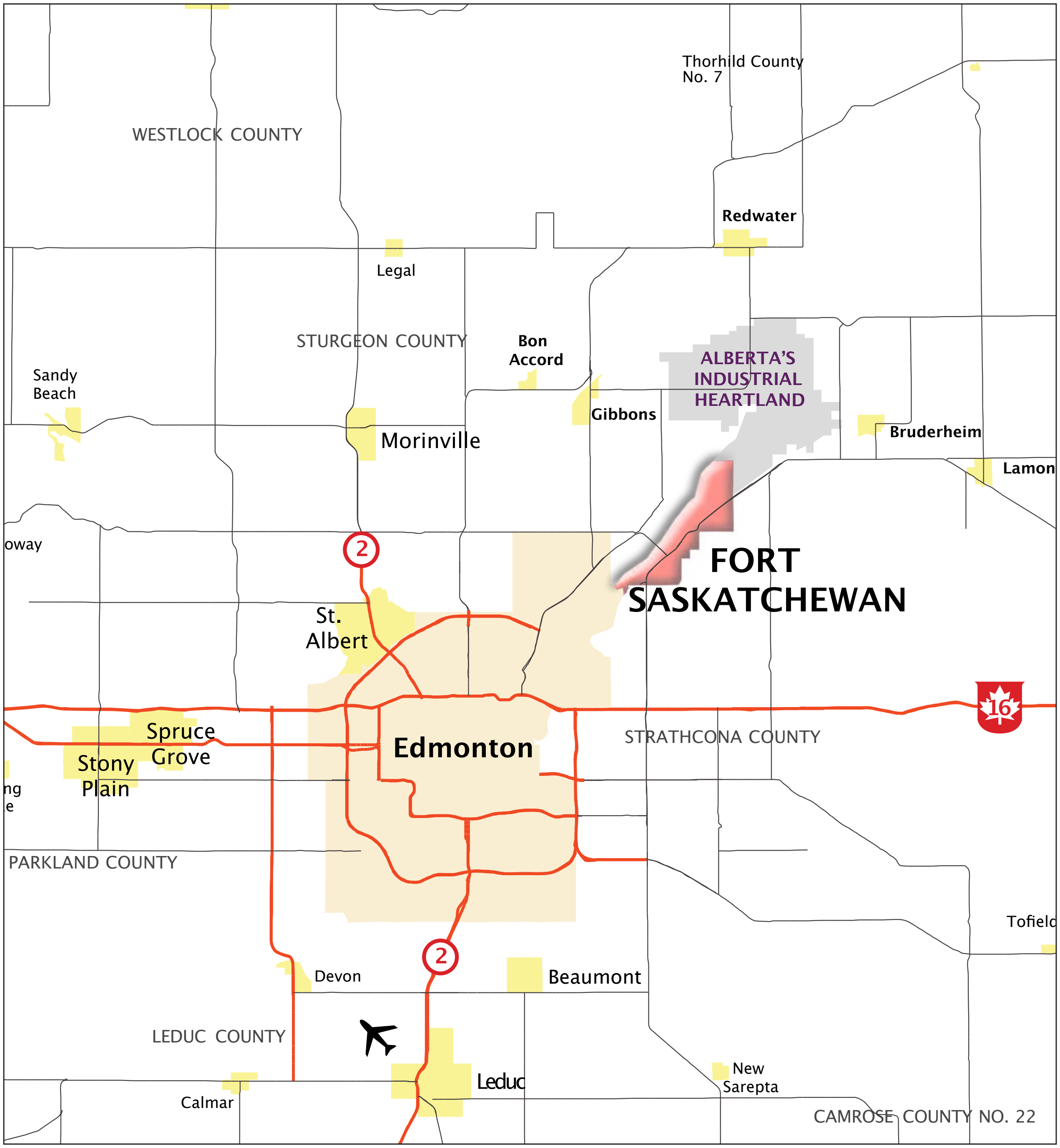
Figure 3.1

## CITY OF FORT SASKATCHEWAN CONTEXT MAP

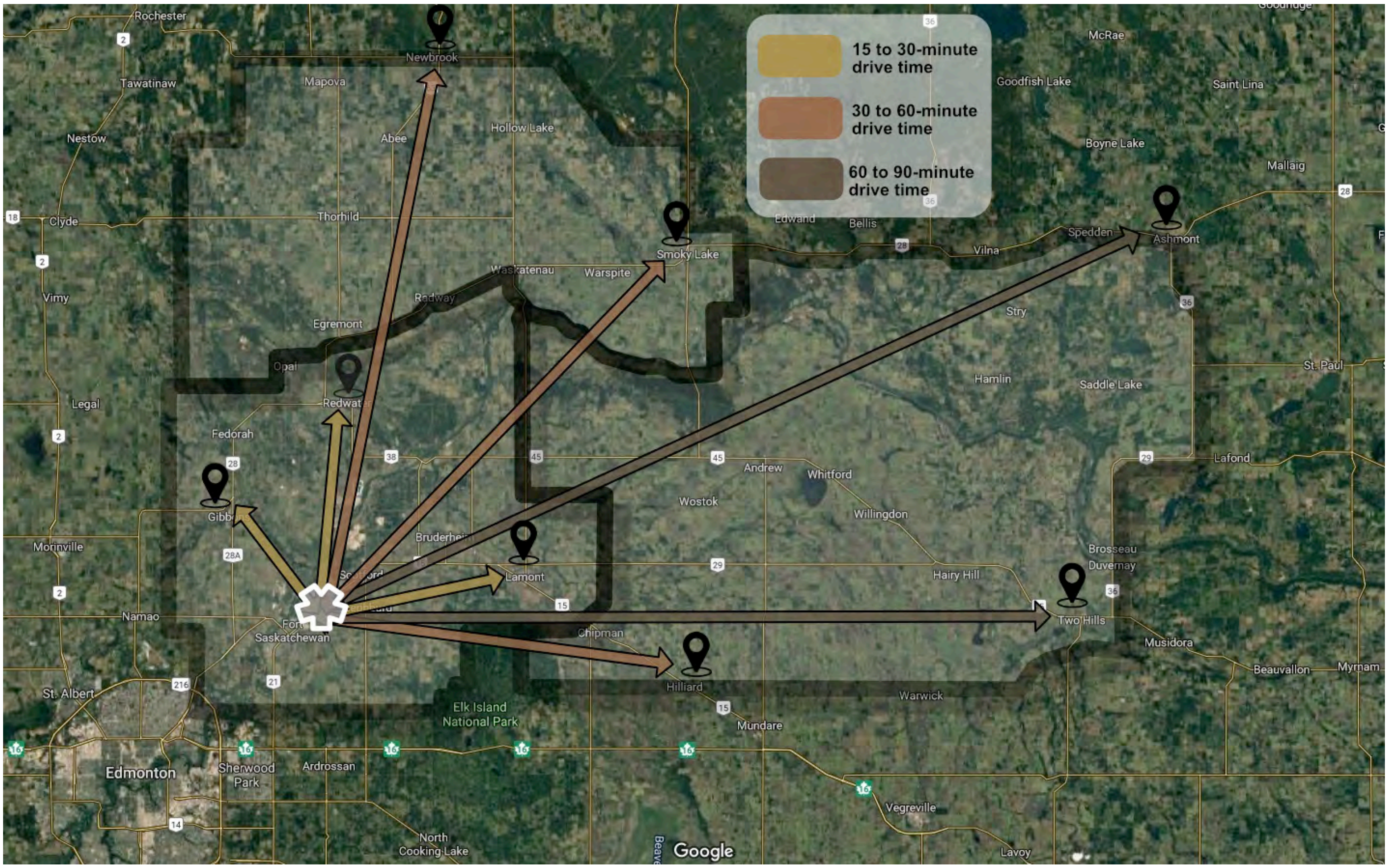





CITY OF FORT SASKATCHEWAN

Figure 3.2

## CITY OF FORT SASKATCHEWAN REGIONAL DRIVE TIMES






CITY OF FORT SASKATCHEWAN

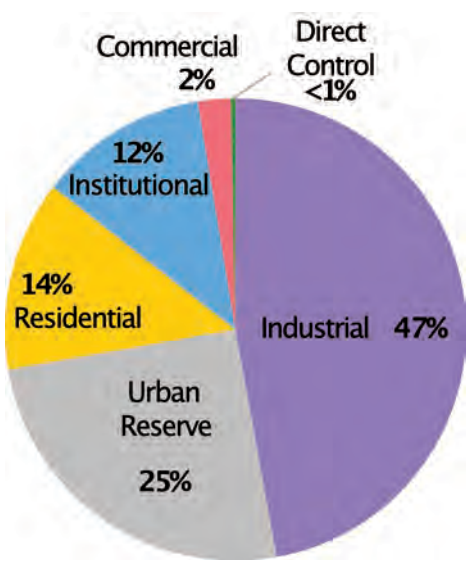
With respect to retail development in this C-designated area, the MDP states, *"The City will concentrate future highway commercial development in these areas…"*, preserving land in other areas for neighbourhood-serving commercial uses.

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.

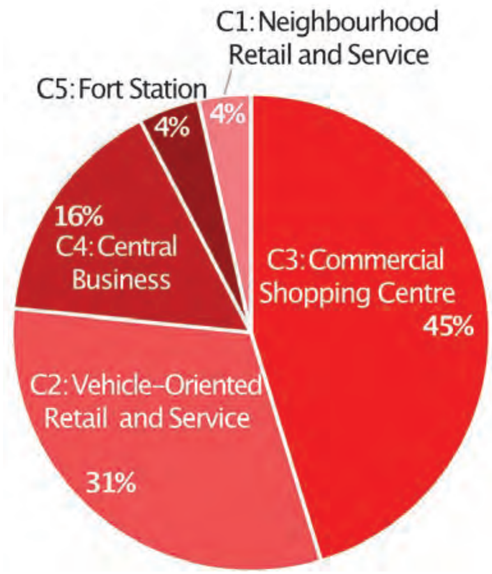
As is stated in the MDP, and further validated by market analysis and inventory fieldwork, the Downtown area has become marginalized by the emergence of power centres over the past decade, particularly in the west side of the City.

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. Refer to Section 6 for a detailed profile of the Downtown, including Consumer Survey results and Stakeholder interviews.**

*Land Use District Composition*




*Commercial Land Use District Composition*




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.

## 3.4 LAND USE BYLAW

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

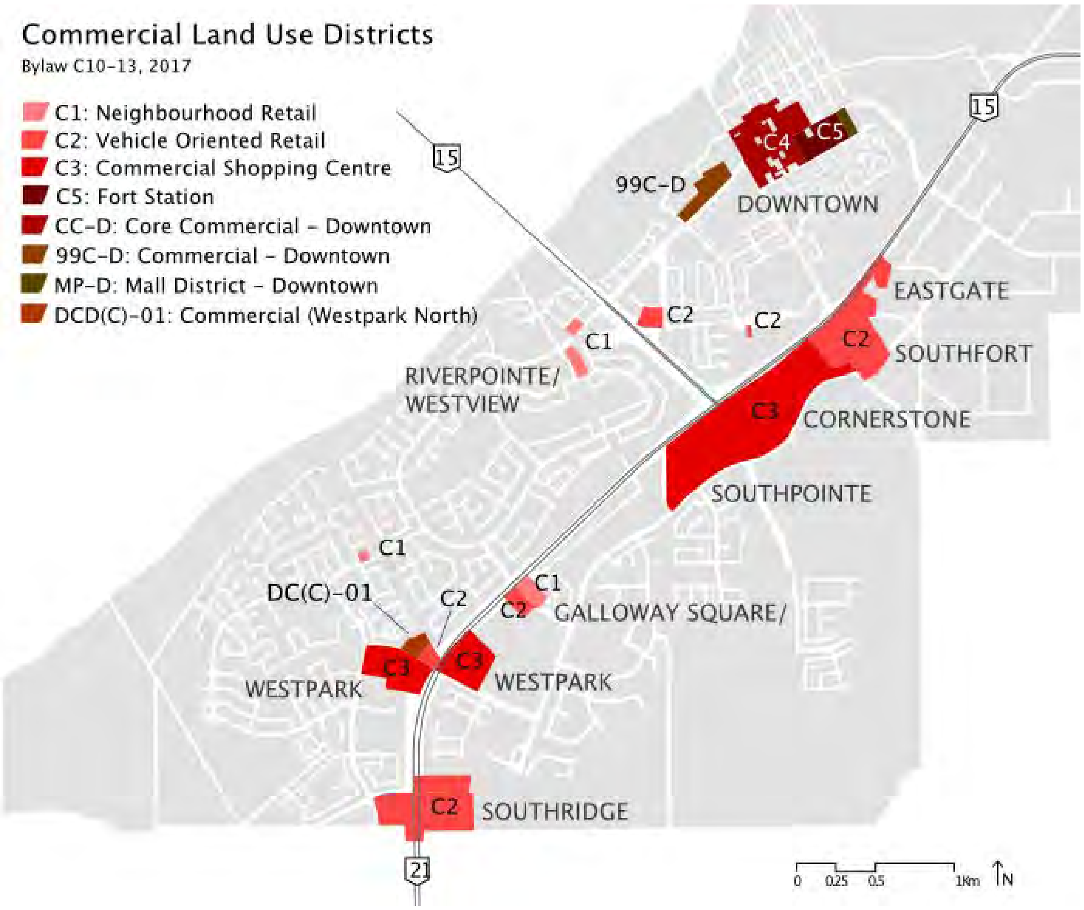
Although Commercially-zoned land comprises about two percent (2%) of all land use in Fort Saskatchewan, the Urban Reserve Land Use District represents areas that have potential for new growth (25%). As such, Urban Reserve areas adjacent to existing Vehicle Oriented Retail and Commercial Shopping Centre 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.



CITY OF FORT SASKATCHEWAN

Figure 3.3

## COMMERCIAL LAND USE DISTRICTS




### 3.5
## STRATEGIC PLAN 2018-2022

The City's Strategic Plan is a comprehensive plan to guide Fort Saskatchewan during the four years of 2018-2022. Goals include ensuring consistent and long term growth, including economic development that is diverse and beneficial for the community.

### 3.6
## COMMERCIAL LAND USE CONTEXT

**Figure 3.3** 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.

### 3.7
## 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 market such as Fort Saskatchewan, a retail location relative to strong and accessible transportation patterns remains an important component, as illustrated by larger scale retail development at the convergence of Hwy 21 & Hwy 15, where traffic counts are highest in the City and are becoming a much wider draw to external regions to the north and east.

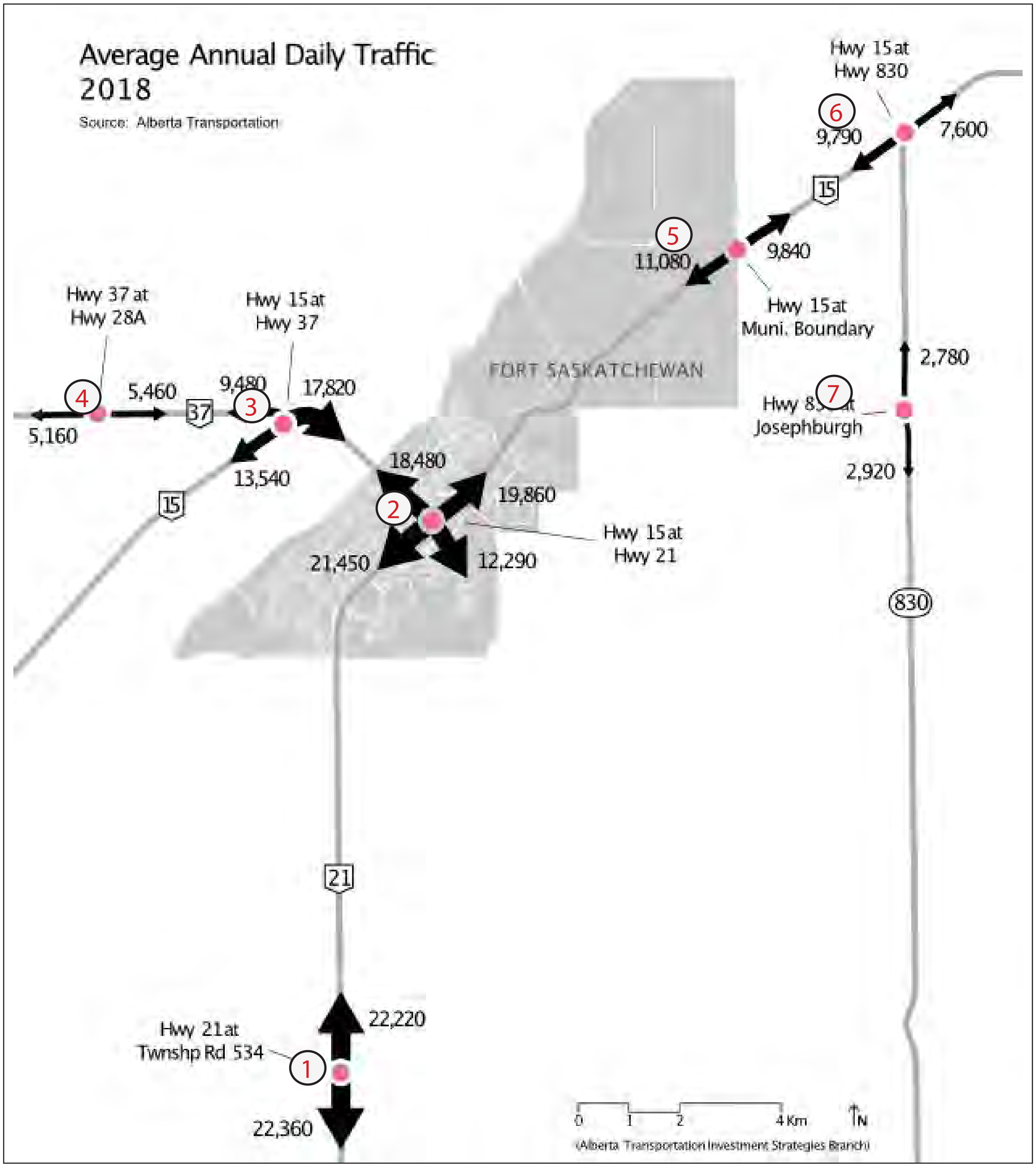


CITY OF FORT SASKATCHEWAN

Figure 3.4

## CITY OF FORT SASKATCHEWAN TRAFFIC COUNTS

(Source: Government of Alberta 2019)



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Accordingly, **Figure 3.4** 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 3.3**, the most recent 2015 traffic counts by the Province illustrated Average Annual Daily Traffic (AADT) at the following intersections:

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

North on Hwy 21 = 22,220

South on Hwy 21 = 22,360

2) **Hwy 15 at Hwy 21**

North on Hwy 15 = 19,860

West on Hwy 15 = 18,480

South on Hwy 21 = 21,450

3) **Hwy 15 at Hwy 37**

East on Hwy 15 = 17,820

South on Hwy 15 = 13,450

West on Hwy 37 = 9480

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

East on Hwy 37 = 5,460

West on Hwy 37 = 5,160

5) **Hwy 15 at Municipal Boundary**

North on Hwy 15 = 9,840

South on Hwy 15 = 11,080

6) **Hwy 15 at Hwy 830**

North on Hwy 15 = 7,600

South on Hwy 830 = 9790

7) **Hwy 830 at Josephburg**

North on Hwy 830 = 2,780

South on Hwy 830 = 2,920

Traffic patterns closely mirror retail hot spots particularly in the central areas where the largest concentrations of traffic flow are in the range of 20,000 - 25,000 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.

## 3.8 DEVELOPMENT & BUILDING PERMITS

Over the past several years, Fort Saskatchewan has seen consistent and steady growth in the number of Building Permits issued. Despite wavering economics across the province, 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.

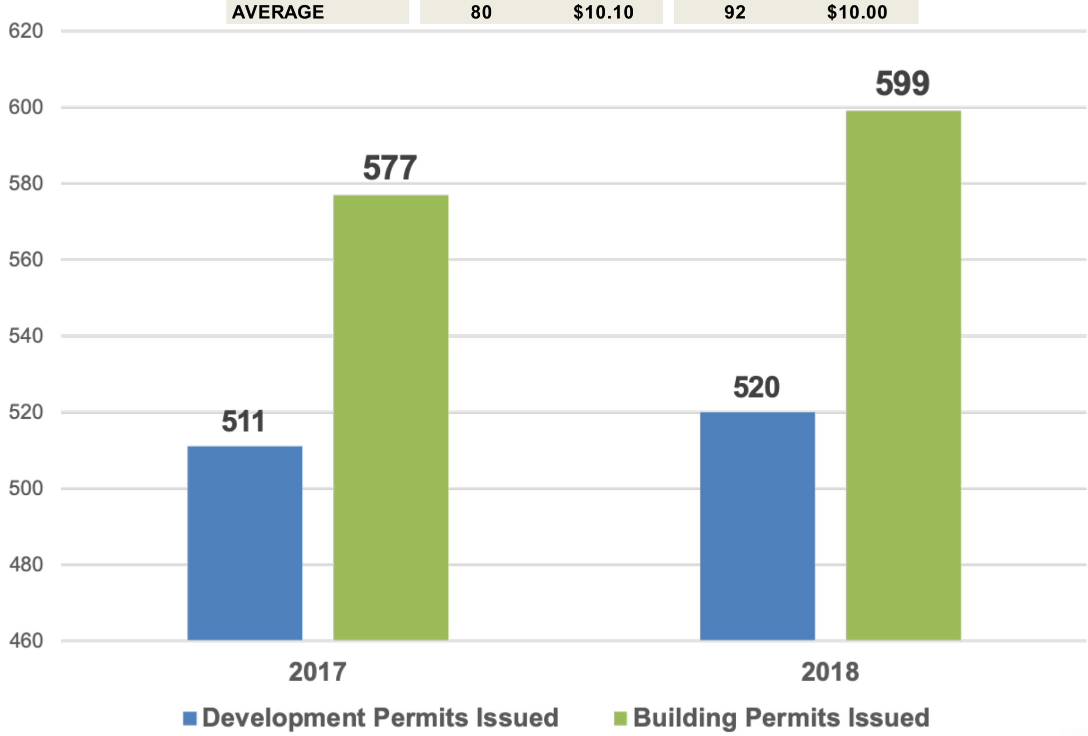
As evidenced in **Figure 3.5** and having come out of the 2014 to 2016 downturn, over the last two complete years of 2017 and 2018, the City of Fort Saskatchewan has exhibited strength, with an average of 516 Development Permits and 588 Building Permits issued for all types of construction in each of those years.

Figure 3.5

## CITY OF FORT SASKATCHEWAN NEW BUILDING & DEVELOPMENT PERMITS ISSUED 2017 - 2018

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

| Year | Month | Development Permits Count | Development Permits Value (millions) | Building Permits Count | Building Permits Value (millions) |
|---|---|---|---|---|---|
| 2017 | Jan | 23 | $2.72 | 31 | $4.51 |
| | Feb | 31 | $4.79 | 34 | $3.21 |
| | Mar | n/a | n/a | 56 | $5.38 |
| | Apr | 50 | $8.36 | 67 | $8.50 |
| | May | 51 | $3.30 | 70 | $7.79 |
| | Jun | 54 | $5.85 | 75 | $15.44 |
| | Jul | 43 | $17.24 | 50 | $1.86 |
| | Aug | 71 | $5.83 | 70 | $16.43 |
| | Sep | 58 | $5.08 | n/a | n/a |
| | Oct | 48 | $24.85 | 49 | $5.36 |
| | Nov | 49 | $7.50 | 43 | $17.56 |
| | Dec | 33 | $3.06 | 32 | $2.80 |
| | **TOTAL** | **511** | **$88.58** | **577** | **$88.84** |
| | **AVERAGE/MONTH** | **85** | **$14.76** | **96** | **$14.81** |
| 2018 | Jan | 40 | $2.76 | 36 | $4.05 |
| | Feb | 24 | $1.57 | 29 | $1.81 |
| | Mar | 55 | $7.73 | 58 | $6.83 |
| | Apr | 45 | $5.41 | 57 | $4.37 |
| | May | 62 | $7.53 | 70 | $5.23 |
| | Jun | 69 | $12.69 | 87 | $9.78 |
| | Jul | 37 | $2.23 | 47 | $6.89 |
| | Aug | 59 | $9.64 | 67 | $9.13 |
| | Sep | 36 | $5.62 | 41 | $2.59 |
| | Oct | 32 | $3.25 | 33 | $4.03 |
| | Nov | 33 | $1.84 | 39 | $3.29 |
| | Dec | 28 | $5.40 | 35 | $7.02 |
| | **TOTAL** | **520** | **$65.67** | **599** | **$65.02** |
| | **AVERAGE** | **80** | **$10.10** | **92** | **$10.00** |






CITY OF FORT SASKATCHEWAN

The value of the above noted Development Permits for the past full two (2) years 2017 and 2018 has worked out to an average of $77.13 million while the Building Permits over the same period averaged a full year value of $76.93 million.

Overall Development and Building Permit data shows a continually growing and resilient market that exhibits strength in the residential and commercial sectors that bodes well for retail growth moving forward.

## 3.9 SUMMARY & IMPLICATIONS

The City of Fort Saskatchewan has continued to exhibit the qualities of 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.

Most importantly, the City of Fort Saskatchewan has evolved into a regional destination for many communities to the north and east whereby Fort Saskatchewan is the primary retail and service destination for communities that may fall within a 1hr to 2 hr drive time away.

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 5.0,** provides a range of options for local, regional, and national tenants.

The City continues to exhibit economic resilience and itself has a diversified economy driven by the expansion of Alberta's Industrial Heartland, as well as the establishment of retail as a destination.

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.

# 4 retail trade area profile

## 4.1 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 ( refer to previous **Figures 3.1 & 3.2**), 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);

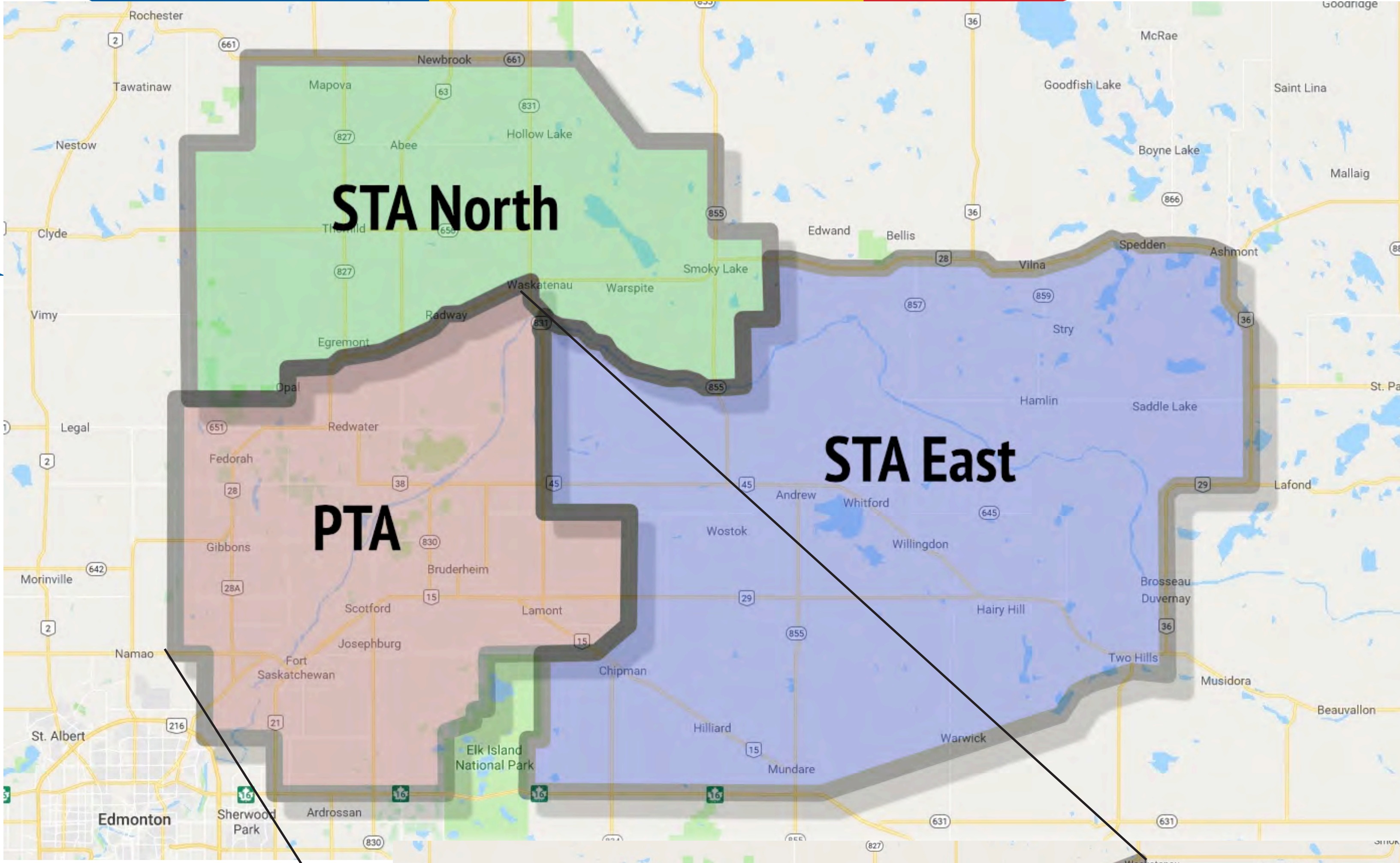
vii. De facto barriers resulting from notable socioeconomic differentiation;

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

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

x. Consumer/Resident Postal Code Data (as available).

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.



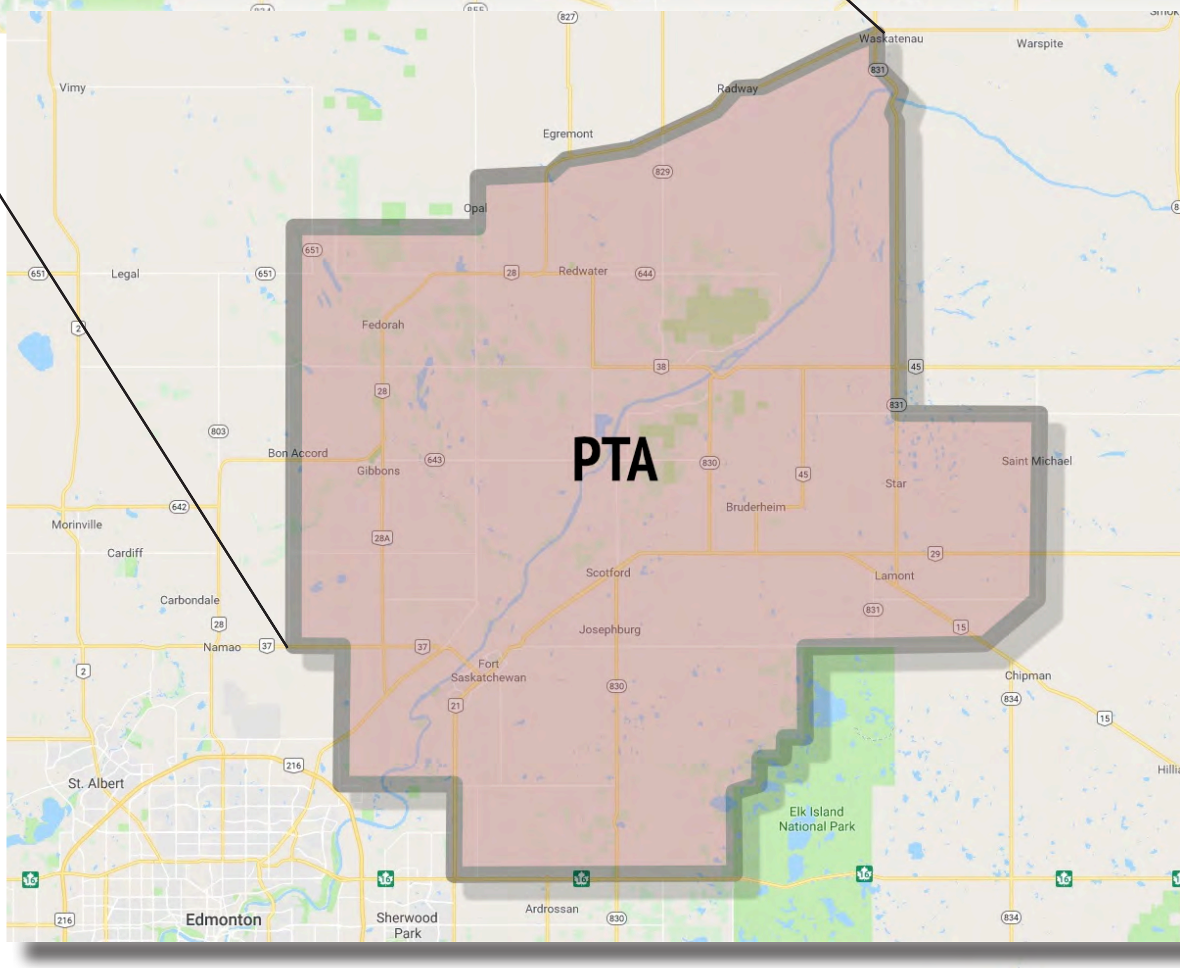



Figure 4.1

## CITY OF FORT SASKATCHEWAN RETAIL TRADE AREA



CITY OF FORT SASKATCHEWAN







Photo credit: Key Planning Strategies, 2018

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 4.1** has been cross-referenced and subsequently validated by the Consumer Intercept Survey, which is documented in **Section 7.0**. This Consumer Intercept Survey used postal codes of respondents to confirm and modify the Trade Area as depicted.

In the time since the City undertook its Retail Gap Analysis in 2014, the City has continued to evolve into a very strong retail destination. While the Consumer Survey still yields a very strong, yet Fort Saskatchewan centric customer base, the reality is that Fort Saskatchewan has established itself as a regional draw for communities from as much as a 2 hour drive away.

Similar recent studies conducted for outlying communities such as Lac La Biche and Vegreville (by Key Planning Strategies/MDB Insight) have highlighted the fact that residents in these communities do take advantage of Fort Saskatchewan's retail, largely because of relative proximity, convenience and the fact that they do not wish to drive into more chaotic Edmonton areas. The exception is when these regional segments are seeking out specific destination retail uses, such as Costco or high performing enclosed malls where big brands may be located.

As a result of Fort Saskatchewan's evolution as a retail market, the new and updated 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 communities that fall predominantly within a 45-minute drive time to the north, northeast and east and includes communities such as Gibbons, Redwater, Bruderheim, Lamont and Radway.

**Secondary Trade Area West (STA North )** includes the residents in smaller communities such as Egremont, Smoky Lake, Waskateneau, Thorhild and Newbrook.

**Secondary Trade Area East (STA East)** is represented by the smaller towns located east and northeast of the PTA and includes towns such as Mundare, Two Hills, Ashmont, Andrew and Chipman.

The study also recognizes the **Miscellaneous Inflow** that results from residents in communities like Lac La Biche, Athabasca, St. Paul or Vegreville who may be more infrequent but will nonetheless be patrons of Fort Saskatchewan's services and retail businesses. This miscellaneous inflow also accounts for the part time residents for whom Fort Saskatchewan is a temporary home while they work in the Oil & Gas Industry. Although not quantified as part of the full-time trade area they are still part of a miscellaneous inflow factor for the City.

# 97,837 BY 2028

TOTAL TRADE AREA POPULATION

4.2
## POPULATION PROJECTIONS

Using data sources that include the City of Fort Saskatchewan, which recently completed a Municipal Census (2019), Statistics Canada, and Manifold Data Mining Inc., population estimates and growth forecasts were tabulated for each of the identified trade areas and further indexed to the City of Edmonton.

The current data presented in Table 4.1 illustrates the population estimates and forecasts, as obtained through Manifold Data Mining Inc. It is worth noting that the City of Fort Saskatchewan in its recently released Municipal Census released in June 2019 lists the City's population at 26,942 (compared to the 27,603 figure listed in Table 4.1). This difference is acknowledged and for the purposes of future demand forecasting, the City's Municipal Census figure is used.

**Table 4.1** 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, based on the updated trade area boundaries (PTA + STA N + STA E) population is now estimated to be just over 75,000 in 2018. This population is forecast to exceed 86,000 by 2023 and 97,000 by 2028.

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 approximately 27,000 and is projected to surpass 43,000 by 2028.

Thus, it can be seen the PTA's future population growth, which is estimated at approximately 2.7% per annum (**Figure 4.2**) will be comprised of more than 52% by the City of Fort Saskatchewan itself.

The revised trade area and updated population estimates clearly reveal a retail market that could approach 100,000 towards the end of the next decade.

Over the period 2011 to 2019 (using the City of Fort Saskatchewan's 2019 Municipal Census and the Federal Census, the City of Fort Saskatchewan grew from 19,800 to 26,942 residents, an average annual growth rate of 3.

**Figure 4.2** illustrates the healthy and favourable growth forecasts for the Primary Trade Area, as driven by the City of Fort Saskatchewan.

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.



CITY OF FORT SASKATCHEWAN

Table 4.1

## TRADE AREA POPULATION PROJECTIONS SUMMARY 2018 TO 2028

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)

| Attribute | Benchmark Edmonton (CSD,AB) | | Fort Sask PTA | | | Fort Sask STA North | | | Fort Sask STA East | | | Fort Sask Total Trade Area | | | Fort Saskatchewan (CSD,AB) | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | value | percent | value | percent | index | value | percent | index | value | percent | index | value | percent | index | value | percent | index |
| **PROJECTIONS** | | | | | | | | | | | | | | | | | |
| Annual population growth in the period: 2018 to 2023 | | 2.7% | | 2.6% | 97 | | 0.5% | 19 | | 2.1% | 79 | | 2.4% | 91 | | 4.6% | 172 |
| Annual household growth in the period: 2018 to 2023 | | 2.1% | | 2.6% | 125 | | 0.4% | 17 | | 0.9% | 44 | | 2.3% | 110 | | 4.3% | 209 |
| Annual family growth in the period: 2018 to 2023 | | 1.8% | | 2.1% | 115 | | 2.5% | 135 | | 0.6% | 32 | | 2.0% | 107 | | 3.6% | 198 |
| Annual population growth in the period: 2023 to 2028 | | 2.6% | | 2.7% | 102 | | 0.5% | 20 | | 2.3% | 88 | | 2.5% | 97 | | 4.5% | 172 |
| Annual household growth in the period: 2023 to 2028 | | 2.0% | | 2.6% | 130 | | 0.4% | 19 | | 1.0% | 50 | | 2.3% | 115 | | 4.2% | 207 |
| Annual family growth in the period: 2023 to 2028 | | 1.8% | | 2.2% | 121 | | 0.9% | 48 | | 0.7% | 39 | | 1.9% | 108 | | 3.4% | 189 |
| **POPULATION GROWTH** | | | | | | | | | | | | | | | | | |
| 2018 Total population | 1,024,770 | | 63,032 | | | 3,743 | | | 9,170 | | | 75,945 | | | 27,603 | | |
| 2023 Total population | 1,172,600 | | 71,936 | | | 3,840 | | | 10,242 | | | 86,019 | | | 34,722 | | |
| 2028 Total population | 1,337,050 | | 82,355 | | | 3,945 | | | 11,537 | | | 97,837 | | | 43,358 | | |
| **HOUSEHOLD GROWTH** | | | | | | | | | | | | | | | | | |
| 2018 Total number of households | 391,370 | | 23,194 | | | 1,553 | | | 3,383 | | | 28,130 | | | 10,504 | | |
| 2023 Total number of households | 433,998 | | 26,418 | | | 1,582 | | | 3,550 | | | 31,550 | | | 12,980 | | |
| 2028 Total number of households | 480,219 | | 30,133 | | | 1,614 | | | 3,739 | | | 35,486 | | | 15,945 | | |
| **FAMILY GROWTH** | | | | | | | | | | | | | | | | | |
| 2018 Total number of census families | 266,666 | | 18,080 | | | 1,112 | | | 2,396 | | | 21,587 | | | 7,789 | | |
| 2023 Total number of census families | 292,715 | | 20,141 | | | 1,257 | | | 2,473 | | | 23,871 | | | 9,330 | | |
| 2028 Total number of census families | 320,195 | | 22,444 | | | 1,313 | | | 2,566 | | | 26,322 | | | 11,023 | | |
| **HOUSEHOLD INCOME GROWTH** | | | | | | | | | | | | | | | | | |
| 2018 Average household income | $123,821 | | $135,331 | | 109 | $100,860 | | 81 | $94,343 | | 76 | $128,499 | | 104 | $140,283 | | 113 |
| 2023 Average household income | $150,007 | | $159,409 | | 106 | $124,085 | | 83 | $105,516 | | 70 | $151,574 | | 101 | $157,361 | | 105 |
| 2028 Average household income | $186,279 | | $191,499 | | 103 | $159,528 | | 86 | $120,856 | | 65 | $182,601 | | 98 | $178,276 | | 96 |

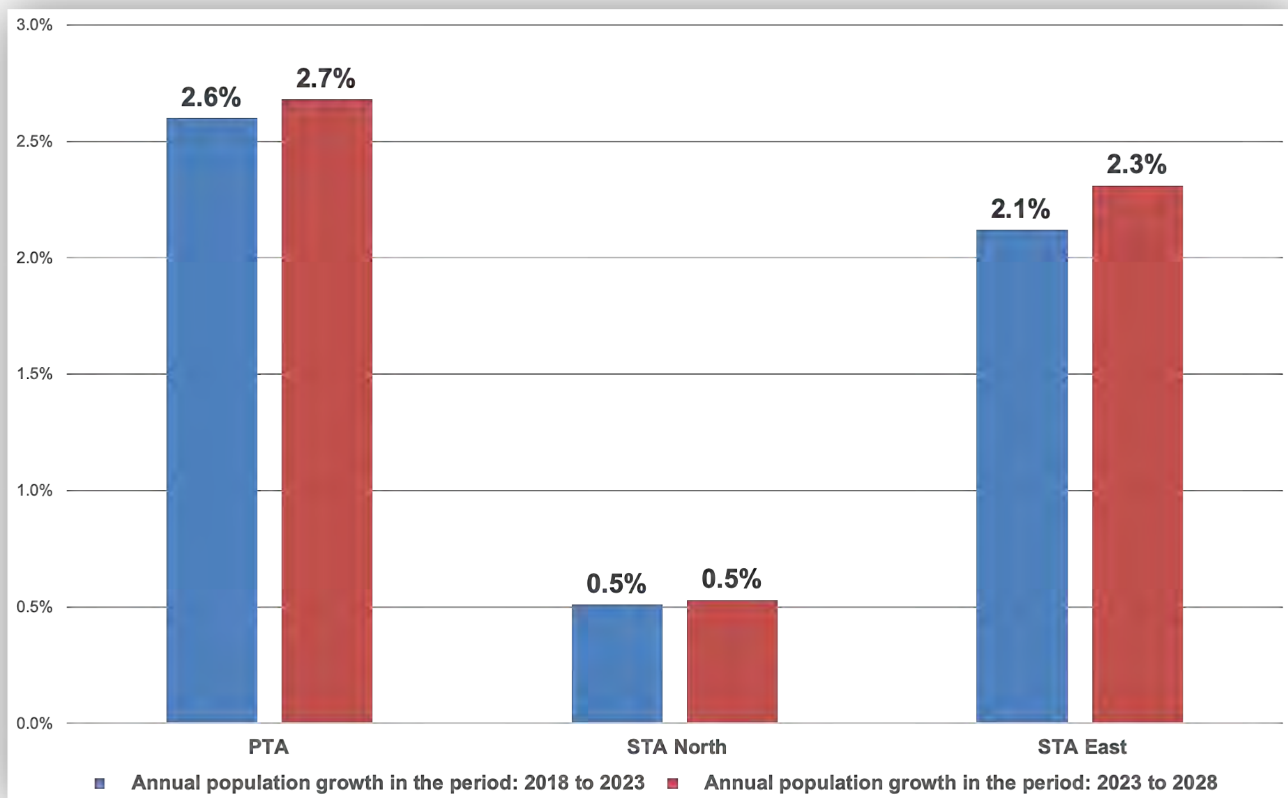
| INDEX | DESCRIPTION |
|---|---|
| >= 180 | Extremely High |
| >= 110 and > 180 | High |
| >= 90 and < 110 | Similar |
| >= 50 and < 90 | Lower |
| < 50 | Extremely Low |

*Data Source: Manifold Data Mining Inc. 2019*
*This report is based on consumer demographic and behavior data products at the 6-digit postal code level. No confidential information about an individual, household, organization or business has been obtained from Statistics Canada or Numeris.*

Figure 4.2

## TRADE AREA POPULATION GROWTH RATES

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)



# 36.6

AVERAGE AGE IN CITY OF FORT SASKATCHEWAN

(38.0 CITY OF EDMONTON AVERAGE)

4.3

## AGE PROFILE

A summary of the current age profile, as documented in **Table 4.2 & Figure 4.3** reveal a very strong family profile with a significant segment in the 0 - 14 year age cohort and young adults entering their high income earning years, with an average age in the City of Fort Saskatchewan of 36.6 years of age.

**Table 4.2** reveals that 30% 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.

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 Station) or Westpark, which continues to evolve rapidly as a local destination for conveniences and food services.

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

Fort Saskatchewan at its core has long been and continues to largely be 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.

However, the emergence of Fort Saskatchewan as a growing regional hub, combined with increasing traffic to the previously noted retail locations suggests that Fort Saskatchewan and its 75,000 person trade area may well be ready to accommodate brands located in Northeast Edmonton that previously may have thought of Fort Saskatchewan as part of their trade area and not a trade area in and of itself. Fort Saskatchewan could be perceived more like Okotoks south of Calgary.

Table 4.2

## TRADE AREA POPULATION AGE BREAKDOWN

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)

| Attribute | Benchmark Edmonton (CSD,AB) | | Fort Sask PTA | | | Fort Sask STA North | | | Fort Sask STA East | | | Fort Sask Total Trade Area | | | Fort Saskatchewan (CSD,AB) | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | value | percent | value | percent | index | value | percent | index | value | percent | index | value | percent | index | value | percent | index |
| **POPULATION AGE GROUP** | | | | | | | | | | | | | | | | | |
| Total population by age groups | 1,024,770 | | 63,033 | | | 3,743 | | | 9,170 | | | 75,945 | | | 27,603 | | |
| 0-14 | 181,825 | 17.74% | 12,399 | 19.67% | 111 | 539 | 14.41% | 81 | 1,741 | 18.98% | 107 | 14,679 | 19.33% | 109 | 5,633 | 20.41% | 115 |
| 0-4 | 65,495 | 6.39% | 4,172 | 6.62% | 104 | 153 | 4.09% | 64 | 535 | 5.83% | 91 | 4,860 | 6.40% | 100 | 2,012 | 7.29% | 114 |
| 5-9 | 61,434 | 6.00% | 4,277 | 6.79% | 113 | 190 | 5.06% | 84 | 634 | 6.92% | 115 | 5,101 | 6.72% | 112 | 1,936 | 7.01% | 117 |
| 10-14 | 54,895 | 5.36% | 3,950 | 6.27% | 117 | 197 | 5.25% | 98 | 572 | 6.23% | 116 | 4,718 | 6.21% | 116 | 1,686 | 6.11% | 114 |
| 15-64 | 720,835 | 70.34% | 42,796 | 67.90% | 97 | 2,240 | 59.84% | 85 | 5,487 | 59.84% | 85 | 50,523 | 66.53% | 95 | 18,951 | 68.66% | 98 |
| 15-19 | 53,543 | 5.23% | 3,680 | 5.84% | 112 | 174 | 4.64% | 89 | 563 | 6.14% | 117 | 4,417 | 5.82% | 111 | 1,512 | 5.48% | 105 |
| 20-24 | 68,050 | 6.64% | 3,811 | 6.05% | 91 | 163 | 4.36% | 66 | 556 | 6.07% | 91 | 4,530 | 5.97% | 90 | 1,711 | 6.20% | 93 |
| 25-29 | 88,253 | 8.61% | 4,547 | 7.21% | 84 | 161 | 4.31% | 50 | 471 | 5.13% | 60 | 5,179 | 6.82% | 79 | 2,291 | 8.30% | 96 |
| 30-34 | 93,251 | 9.10% | 5,082 | 8.06% | 89 | 184 | 4.92% | 54 | 440 | 4.80% | 53 | 5,706 | 7.51% | 83 | 2,565 | 9.29% | 102 |
| 35-39 | 86,150 | 8.41% | 4,900 | 7.77% | 92 | 183 | 4.88% | 58 | 459 | 5.00% | 59 | 5,541 | 7.30% | 87 | 2,330 | 8.44% | 100 |
| 40-44 | 73,009 | 7.12% | 4,223 | 6.70% | 94 | 192 | 5.14% | 72 | 435 | 4.74% | 67 | 4,850 | 6.39% | 90 | 1,923 | 6.97% | 98 |
| 45-49 | 66,716 | 6.51% | 4,009 | 6.36% | 98 | 228 | 6.08% | 93 | 486 | 5.30% | 81 | 4,723 | 6.22% | 96 | 1,749 | 6.34% | 97 |
| 50-54 | 65,925 | 6.43% | 4,263 | 6.76% | 105 | 272 | 7.26% | 113 | 603 | 6.58% | 102 | 5,138 | 6.77% | 105 | 1,718 | 6.23% | 97 |
| 55-59 | 67,109 | 6.55% | 4,452 | 7.06% | 108 | 328 | 8.77% | 134 | 747 | 8.15% | 124 | 5,527 | 7.28% | 111 | 1,718 | 6.22% | 95 |
| 60-64 | 58,828 | 5.74% | 3,831 | 6.08% | 106 | 355 | 9.47% | 165 | 726 | 7.92% | 138 | 4,911 | 6.47% | 113 | 1,434 | 5.20% | 91 |
| 65 and over | 122,112 | 11.92% | 7,837 | 12.43% | 104 | 964 | 25.75% | 216 | 1,942 | 21.18% | 178 | 10,743 | 14.15% | 119 | 3,018 | 10.94% | 92 |
| 65-69 | 39,184 | 3.82% | 2,621 | 4.16% | 109 | 269 | 7.20% | 188 | 617 | 6.73% | 176 | 3,507 | 4.62% | 121 | 950 | 3.44% | 90 |
| 70-74 | 28,717 | 2.80% | 1,948 | 3.09% | 110 | 231 | 6.16% | 220 | 528 | 5.76% | 206 | 2,707 | 3.56% | 127 | 729 | 2.64% | 94 |
| 75-79 | 20,091 | 1.96% | 1,285 | 2.04% | 104 | 176 | 4.71% | 240 | 374 | 4.08% | 208 | 1,835 | 2.42% | 123 | 522 | 1.89% | 96 |
| 80-84 | 15,523 | 1.52% | 920 | 1.46% | 96 | 132 | 3.52% | 232 | 226 | 2.46% | 162 | 1,277 | 1.68% | 111 | 387 | 1.40% | 92 |
| 85 and over | 18,596 | 1.82% | 1,064 | 1.69% | 93 | 155 | 4.15% | 228 | 197 | 2.15% | 118 | 1,417 | 1.87% | 103 | 431 | 1.56% | 86 |
| 85-89 | 11,341 | 1.11% | 608 | 0.96% | 86 | 73 | 1.96% | 177 | 117 | 1.27% | 114 | 798 | 1.05% | 95 | 237 | 0.86% | 77 |
| 90-94 | 5,549 | 0.54% | 323 | 0.51% | 94 | 53 | 1.41% | 261 | 63 | 0.69% | 128 | 439 | 0.58% | 107 | 146 | 0.53% | 98 |
| 95-99 | 1,502 | 0.15% | 118 | 0.19% | 127 | 23 | 0.62% | 413 | 14 | 0.16% | 107 | 156 | 0.20% | 133 | 47 | 0.17% | 113 |
| 100 and over | 204 | 0.02% | 15 | 0.02% | 100 | 6 | 0.16% | 800 | 3 | 0.04% | 200 | 25 | 0.03% | 150 | 1 | 0.00% | 0 |
| Average age of total population | 38.00 | | **38.00** | | 100 | **47.00** | | 124 | **42.20** | | 111 | 38.90 | | 102 | **36.60** | | 96 |
| Median age of total population | 36.60 | | 38.40 | | 105 | 50.80 | | 139 | 43.30 | | 118 | 39.60 | | 108 | 32.50 | | 89 |

| INDEX | DESCRIPTION |
|---|---|
| >= 180 | Extremely High |
| >= 110 and > 180 | High |
| >= 90 and < 110 | Similar |
| >= 50 and < 90 | Lower |
| < 50 | Extremely Low |

*Data Source: Manifold Data Mining Inc. 2019*

*This report is based on consumer demographic and behavior data products at the 6-digit postal code level. No confidential information about an individual, household, organization or business has been obtained from Statistics Canada or Numeris*

Figure 4.3

## TRADE AREA POPULATION AGE BREAKDOWN

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)

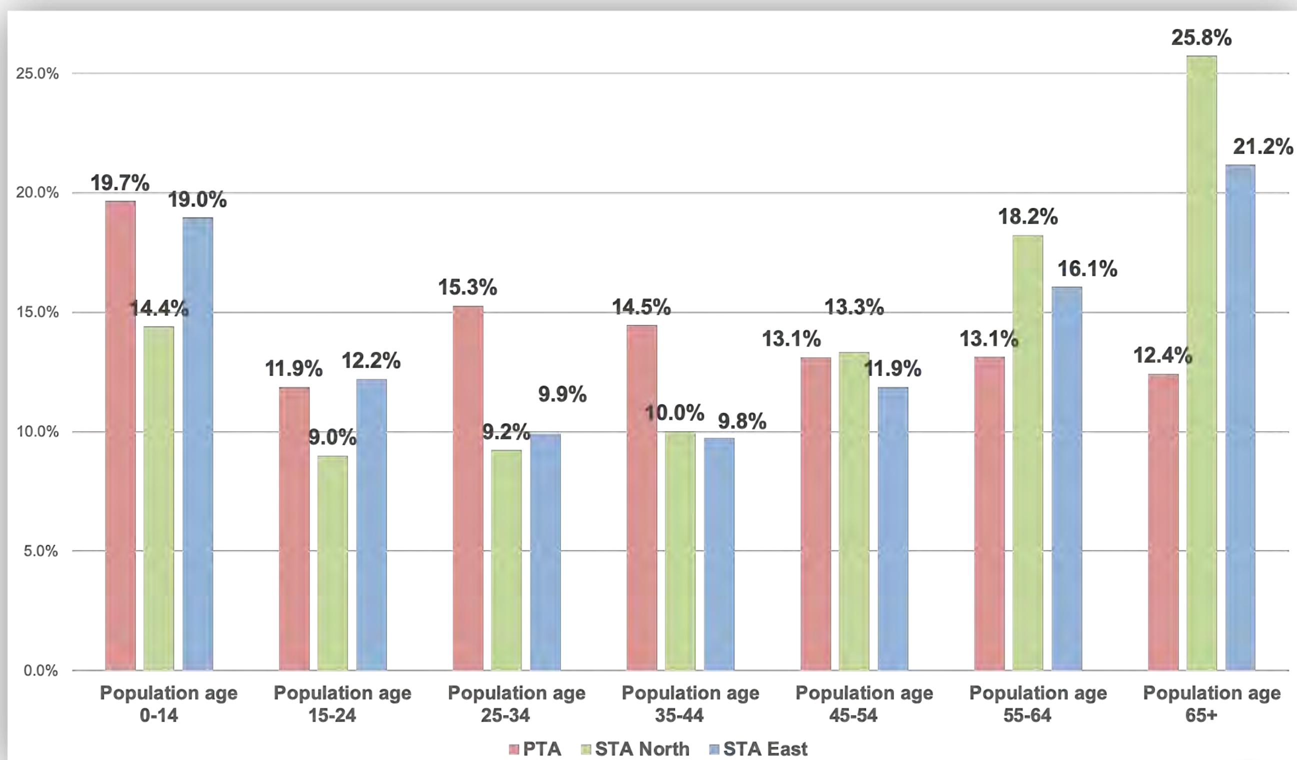


Table 4.3

## TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)

| Attribute | Benchmark Edmonton (CSD,AB) | | Fort Sask PTA | | | Fort Sask STA North | | | Fort Sask STA East | | | Fort Sask Total Trade Area | | | Fort Saskatchewan (CSD,AB) | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | value | percent | value | percent | index | value | percent | index | value | percent | index | value | percent | index | value | percent | index |
| **HOUSEHOLD INCOME** | | | | | | | | | | | | | | | | | |
| **Total number of households** | **391,370** | | **23,194** | | | **1,553** | | | **3,383** | | | **28,130** | | | **10,504** | | |
| **Average household income $** | **$123,821** | | **$135,331** | | **109** | **$100,860** | | **81** | **$94,343** | | **76** | **$128,498** | | **104** | **$140,283** | | **113** |
| **Median houshold income $** | **$95,208** | | **$117,343** | | **123** | **$78,920** | | **83** | **$75,753** | | **80** | **$110,220** | | **116** | **$130,050** | | **137** |
| Household with income under $5,000 | 4,933 | 1.26% | 168 | 0.72% | 57 | 5 | 0.30% | 24 | 32 | 0.93% | 74 | 204 | 0.73% | 58 | 73 | 0.70% | 56 |
| Household with income $5,000 to $9,999 | 4,525 | 1.16% | 174 | 0.75% | 65 | 12 | 0.77% | 66 | 35 | 1.04% | 90 | 221 | 0.79% | 68 | 68 | 0.65% | 56 |
| Household with income $10,000 to $14,999 | 5,344 | 1.37% | 184 | 0.79% | 58 | 9 | 0.55% | 40 | 61 | 1.82% | 133 | 254 | 0.90% | 66 | 63 | 0.60% | 44 |
| Household with income $15,000 to $19,999 | 8,481 | 2.17% | 300 | 1.29% | 59 | 34 | 2.20% | 101 | 95 | 2.81% | 129 | 429 | 1.53% | 71 | 120 | 1.14% | 53 |
| Household with income $20,000 to $24,999 | 12,531 | 3.20% | 444 | 1.91% | 60 | 80 | 5.14% | 161 | 162 | 4.78% | 149 | 685 | 2.44% | 76 | 170 | 1.61% | 50 |
| Household with income $25,000 to $29,999 | 11,485 | 2.94% | 532 | 2.29% | 78 | 99 | 6.34% | 216 | 157 | 4.63% | 157 | 787 | 2.80% | 95 | 205 | 1.95% | 66 |
| Household with income $30,000 to $34,999 | 11,460 | 2.93% | 566 | 2.44% | 83 | 79 | 5.08% | 173 | 154 | 4.54% | 155 | 799 | 2.84% | 97 | 225 | 2.15% | 73 |
| Household with income $35,000 to $39,999 | 12,440 | 3.18% | 611 | 2.63% | 83 | 71 | 4.56% | 143 | 153 | 4.52% | 142 | 835 | 2.97% | 93 | 235 | 2.24% | 70 |
| Household with income $40,000 to $44,999 | 12,682 | 3.24% | 605 | 2.61% | 81 | 73 | 4.71% | 145 | 157 | 4.64% | 143 | 835 | 2.97% | 92 | 235 | 2.24% | 69 |
| Household with income $45,000 to $49,999 | 13,047 | 3.33% | 598 | 2.58% | 77 | 75 | 4.86% | 146 | 166 | 4.90% | 147 | 839 | 2.98% | 89 | 209 | 1.99% | 60 |
| Household with income $50,000 to $59,999 | 23,565 | 6.02% | 1,017 | 4.39% | 73 | 83 | 5.31% | 88 | 226 | 6.69% | 111 | 1,326 | 4.71% | 78 | 455 | 4.34% | 72 |
| Household with income $60,000 to $69,999 | 26,169 | 6.69% | 1,220 | 5.26% | 79 | 104 | 6.68% | 100 | 244 | 7.22% | 108 | 1,568 | 5.57% | 83 | 531 | 5.05% | 75 |
| Household with income $70,000 to $79,999 | 25,518 | 6.52% | 1,314 | 5.67% | 87 | 100 | 6.46% | 99 | 240 | 7.10% | 109 | 1,654 | 5.88% | 90 | 536 | 5.10% | 78 |
| Household with income $80,000 to $89,999 | 23,976 | 6.13% | 1,307 | 5.63% | 92 | 92 | 5.94% | 97 | 198 | 5.84% | 95 | 1,596 | 5.68% | 93 | 554 | 5.27% | 86 |
| Household with income $90,000 to $99,999 | 23,322 | 5.96% | 1,341 | 5.78% | 97 | 80 | 5.12% | 86 | 203 | 5.99% | 101 | 1,624 | 5.77% | 97 | 564 | 5.37% | 90 |
| Household with income $100,000 and over | 167,676 | 42.84% | 12,639 | 54.49% | 127 | 522 | 33.62% | 78 | 1,061 | 31.37% | 73 | 14,222 | 50.56% | 118 | 6,204 | 59.06% | 138 |
| Household with income $100,000 to $124,999 | 43,546 | 11.13% | 2,482 | 10.70% | 96 | 102 | 6.56% | 59 | 232 | 6.86% | 62 | 2,816 | 10.01% | 90 | 1,279 | 12.18% | 109 |
| Household with income $125,000 to $149,999 | 38,285 | 9.78% | 2,711 | 11.69% | 120 | 121 | 7.77% | 79 | 239 | 7.06% | 72 | 3,070 | 10.92% | 112 | 1,287 | 12.26% | 125 |
| Household with income $150,000 to $199,999 | 43,392 | 11.09% | 3,286 | 14.17% | 128 | 123 | 7.92% | 71 | 253 | 7.48% | 67 | 3,662 | 13.02% | 117 | 1,699 | 16.17% | 146 |
| Household with income $200,000 and over | 46,670 | 11.93% | 4,335 | 18.69% | 157 | 213 | 13.72% | 115 | 377 | 11.15% | 93 | 4,925 | 17.51% | 147 | 1,996 | 19.00% | 159 |

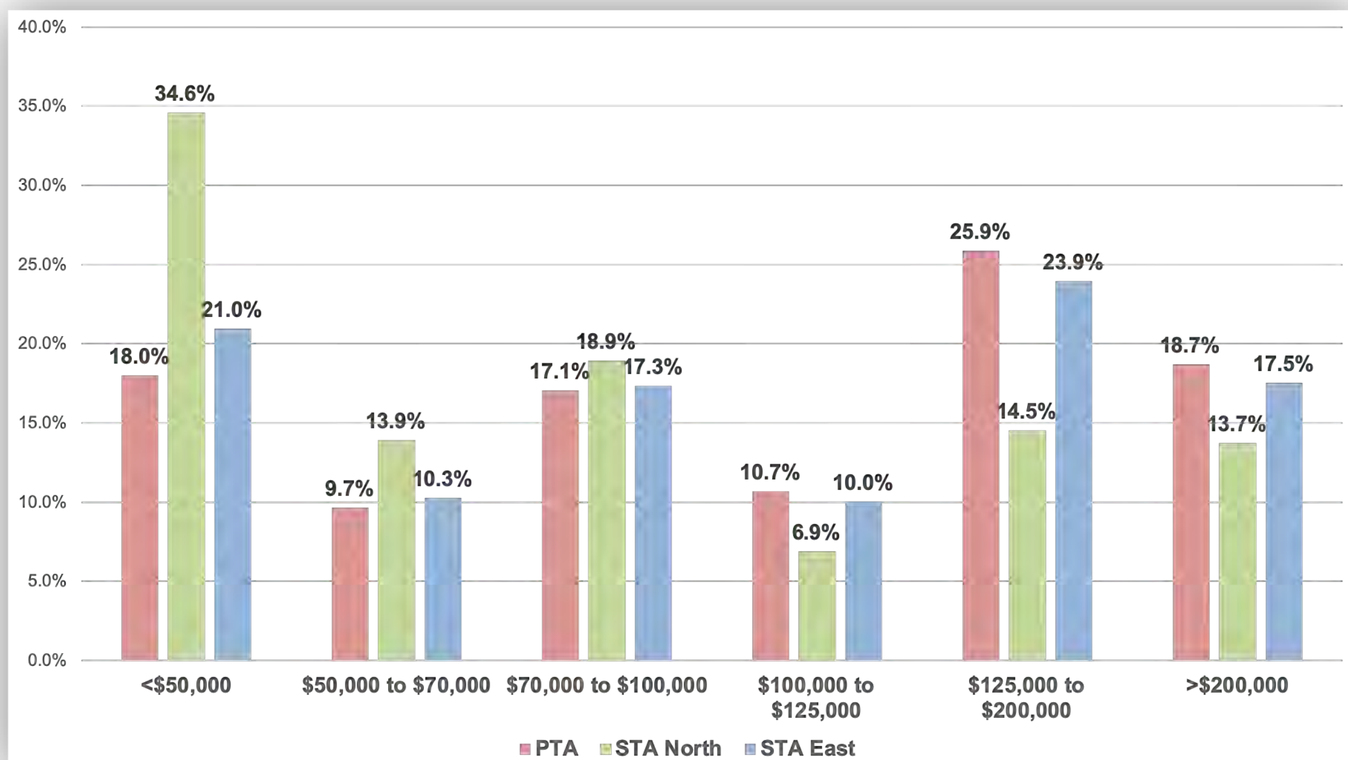
| INDEX | DESCRIPTION |
|---|---|
| >= 180 | Extremely High |
| >= 110 and > 180 | High |
| >= 90 and < 110 | Similar |
| >= 50 and < 90 | Lower |
| < 50 | Extremely Low |

*Data Source: Manifold Data Mining Inc. 2019*
*This report is based on consumer demographic and behavior data products at the 6-digit postal code level. No confidential information about an individual, household, organization or business has been obtained from Statistics Canada or Numeris.*

Figure 4.4

## TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)



47%

PERCENTAGE OF CITY'S HOUSEHOLDS EARNING OVER $125,000 PER YEAR (2018 ESTIMATES)

(33% CITY OF EDMONTON AVERAGE)

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.

## 4.4 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 4.3 and Figure 4.4** reveals an average Household Income in 2018 estimated at over $128,000 in the City of Fort Saskatchewan and $135,000 in the total Primary Trade Area, which is higher than the City of Edmonton average of $123,000.

To supplement this Statistics Canada figure, the Consumer Intercept Survey (refer to **Section 7.0**) documented a similar trend whereby over 27% of all respondents indicated a household income of higher than $125,000 per annum.

**Figure 4.4** shows the former trend whereby 47% of the PTA households earn over $125,000, which is higher than the rest of the Trade Area and the City of Edmonton.

According to Manifold Data Mining Inc**,** Household Income in the City of Fort Saskatchewan is forecast to grow at an average annual rate of 4.3% per annum, over the 10-year period 2018 to 2028.

Similarly, the PTA is forecast to increase at an average annual rate of 4.7% over this same 10-year time frame. These represents significant income and growth rates that are very favourable for retail opportunities.

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.

## 4.5 RETAIL SPENDING PROFILE

Building upon the City's 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 in 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)?

# $1.2 Billion

## TOTAL TRADE AREA RETAIL SPENDING IN 2018 (YEAR END ESTIMATE)

Detailed information of retail spending within the Trade Area was collected from Manifold Data Mining Inc, 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 understanding how each of the delineated Trade Area residents spend their shopping and leisure dollars on a per capita basis for each of 22 spending categories.

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 Manifold Data Mining Inc.

As illustrated in **Table 4.4**, the Total Trade Area for the City of Fort Saskatchewan is estimated at $1.2 Billion (2018 year end estimate).

As noted previously Fort Saskatchewan has grown over the past 5 years to become from a locally serving to a more regional-serving retail destination.

As such, 85% of the total spending in the market is from the PTA, and almost 48% of that spending potential comes from Fort Saskatchewan residents.

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, continue to limit the ability of Fort Saskatchewan to tap into spending further south, but this has not stopped the City from continuing to be attractive to retailers who wish to set up shop in Fort Saskatchewan.

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. In the past, many of the larger retailers were likely to look at Emerald Hills and Manning Town Centre before Fort Saskatchewan, and while this is still a factor, these same retailers may now be enticed to looking at Fort Saskatchewan as part of their own expanded store network strategy whereby Fort Saskatchewan and its strong population growth, income growth and regional draw could be seen as appealing.

[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 Accessories, Furniture and Other Stores.*

Table 4.4

## TRADE AREA RETAIL SPENDING 2018 Y/E

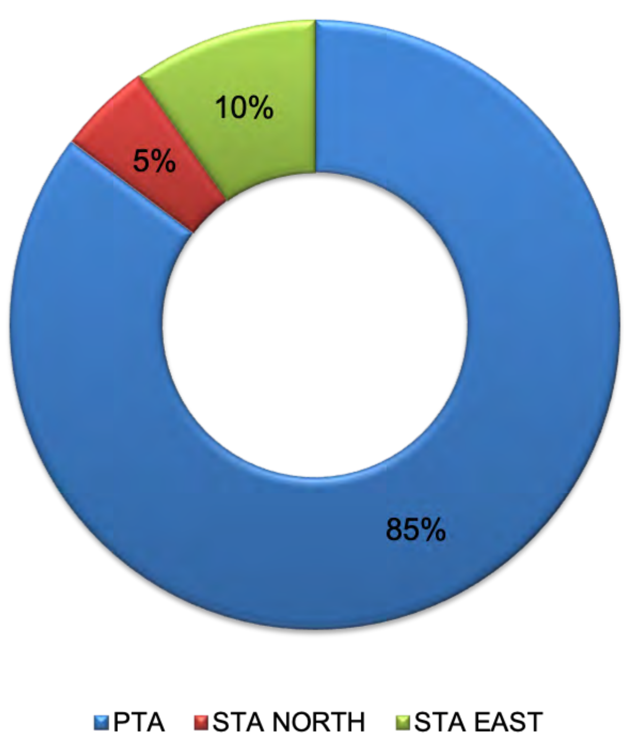
(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)

| Retail Spending by Merchandise Category | 2018 PTA Including Fort Saskatchewan Household Retail Spending | PTA Including Fort Saskatchewan Aggregate Retail Spending | 2018 STA North Household Retail Spending | STA North Aggregate Retail Spending | 2018 STA East Household Retail Spending | STA East Trade Area Aggregate Retail Spending | TOTAL Trade Area Aggregate Retail Spending |
|---|---|---|---|---|---|---|---|
| Grocery & Specialty Foods | $10,416 | $241,588,704 | $10,016 | $15,554,848 | $9,323 | $31,539,709 | $288,683,261 |
| Pharmacy | $818 | $18,972,692 | $781 | $1,212,893 | $830 | $2,807,890 | $22,993,475 |
| Alcohol & Tobacco | $1,607 | $37,272,758 | $1,327 | $2,060,831 | $1,228 | $4,154,324 | $43,487,913 |
| Personal Services | $1,631 | $37,829,414 | $1,390 | $2,158,670 | $1,252 | $4,235,516 | $44,223,600 |
| Clothing & Apparel | $2,576 | $59,747,744 | $1,911 | $2,967,783 | $1,781 | $6,025,123 | $68,740,650 |
| Footwear | $881 | $20,433,914 | $652 | $1,012,556 | $607 | $2,053,481 | $23,499,951 |
| Jewelry & Accessories | $482 | $11,179,508 | $359 | $557,527 | $336 | $1,136,688 | $12,873,723 |
| Health & Beauty | $966 | $22,405,404 | $781 | $1,212,893 | $718 | $2,428,994 | $26,047,291 |
| Home Furniture & Décor | $1,372 | $31,822,168 | $1,269 | $1,970,757 | $1,030 | $3,484,490 | $37,277,415 |
| Home Electronics & Appliances | $4,975 | $115,390,150 | $4,061 | $6,306,733 | $3,890 | $13,159,870 | $134,856,753 |
| Home Improvement & Gardening | $1,571 | $36,437,774 | $1,605 | $2,492,565 | $1,446 | $4,891,818 | $43,822,157 |
| Books & Media | $1,528 | $35,440,432 | $1,111 | $1,725,383 | $759 | $2,567,697 | $39,733,512 |
| Sporting Goods | $384 | $8,906,496 | $297 | $461,241 | $241 | $815,303 | $10,183,040 |
| Toys & Hobbies | $370 | $8,581,780 | $305 | $473,665 | $284 | $960,772 | $10,016,217 |
| Specialty Retail | $633 | $14,681,802 | $632 | $981,496 | $556 | $1,880,948 | $17,544,246 |
| Quick Service F&B | $445 | $10,321,330 | $375 | $582,375 | $349 | $1,180,667 | $12,084,372 |
| Full Service Restaurants | $2,738 | $63,505,172 | $2,235 | $3,470,955 | $2,093 | $7,080,619 | $74,056,746 |
| Arts & Entertainment | $1,187 | $27,531,278 | $1,037 | $1,610,461 | $941 | $3,183,403 | $32,325,142 |
| Drinking Establishments | $251 | $5,821,694 | $200 | $310,600 | $185 | $625,855 | $6,758,149 |
| Fitness & Leisure | $539 | $12,501,566 | $430 | $667,790 | $394 | $1,332,902 | $14,502,258 |
| Auto Parts & Accessories | $763 | $17,697,022 | $638 | $990,814 | $580 | $1,962,140 | $20,649,976 |
| Auto/RV/Motorsports Dealerships | $8,229 | $190,863,426 | $6,922 | $10,749,866 | $6,184 | $20,920,472 | $222,533,764 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$44,362** | **$1,028,932,228** | **$38,334** | **$59,532,702** | **$35,007** | **$118,428,681** | **$1,206,893,611** |

Figure 4.5

## TRADE AREA RETAIL SPENDING BY TRADE AREA SEGMENT

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)




# ~85%

PTA RESIDENTS' SHARE OF TOTAL TRADE AREA SPENDING

Figure 4.6

## TRADE AREA RETAIL SPENDING SUMMARY 2018 Y/E

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)

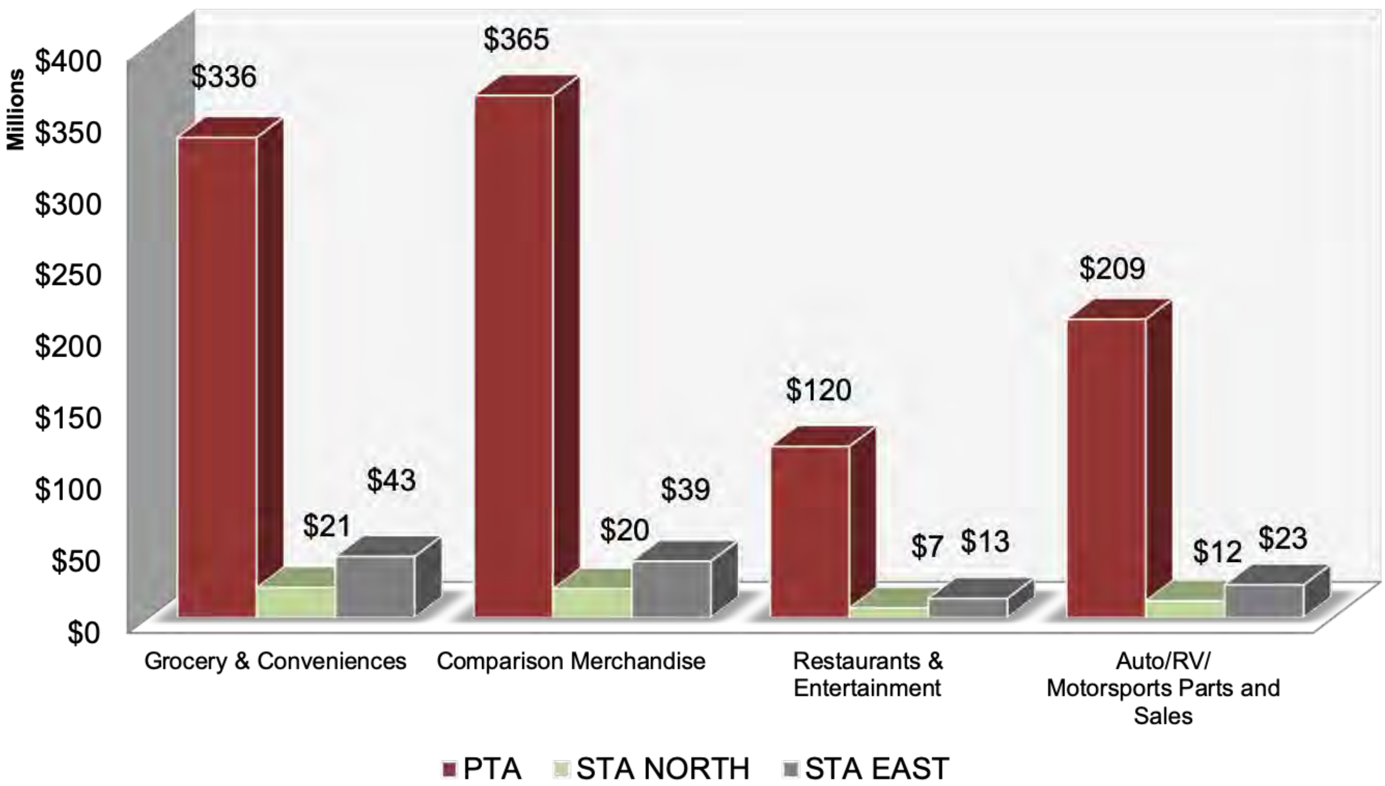
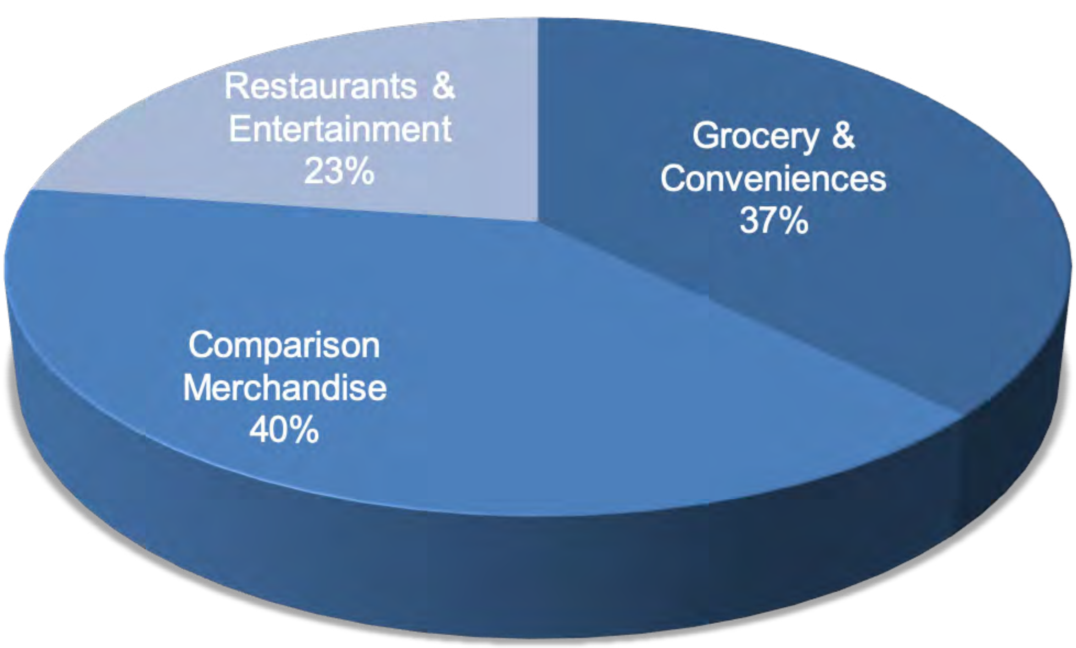



Figure 4.7

## TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

(Source: Manifold Data Mining Inc, and Key Planning Strategies 2019)



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

1. *Grocery & Specialty Foods - $288.7 Million*
2. *Auto/RV/Motorsport - $222.5 Million*
3. *Home Electronics & Appliances - $134.9 Million*
4. *Full & Quick Service Restaurants - $106.4 Million*
5. *Clothing/Footwear/Accessories - $105.1 Million*

4.6
## SUMMARY & IMPLICATIONS

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

Fort Saskatchewan has proven itself over the past 5 years as a major retail location where businesses can be attracted and succeed.

Specifically, in conjunction withe the continued population growth of the City, the successful attraction of retail over the past 5 years has rapidly evolved the City from a local-serving destination to a regional-serving hub that caters to many communities to the north and east while at the same time has competed well against the emerging retail nodes in northeast Edmonton and Strathcona County.

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 necessity-based merchandise, while not discounting the need for more essential comparison items.

Fort Saskatchewan has shown a maturity in its retail growth that has enabled it to first and foremost retain a larger share of local spending, thus curbing retail sales outflow. This initial step must continue, but this strong retention is what has justified more regional attraction.

The Trade Area Demographic Profile illustrates a growing regional trade area that is forecast to increase from over 63,000 in 2018 to in excess of 97,000 over the next decade.

Fort Saskatchewan's strengths lie in its demographics, which are substantiated by a significant household income and population growth, well above the City of Edmonton average.

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 $1.2 Billion retail market (2018 Y/E estimates) in which categories such as Grocery, Automotive/RV, Home Electronics & Appliances, Clothing/Footwear/Accessories 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.



CITY OF FORT SASKATCHEWAN

# Overview of Fort Sask PTA

## Population

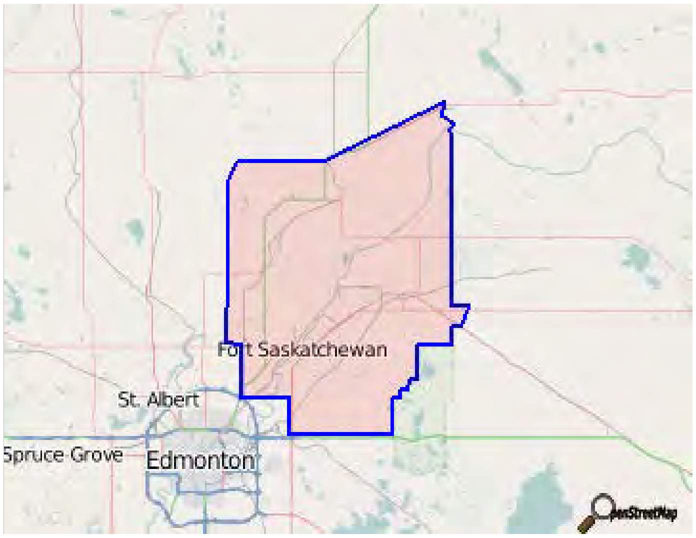
| | |
|---|---|
| Total Population | 63,032 |
| Population with age 0-14 | 19.67% |
| Population with age 15-24 | 11.88% |
| Population with age 25-34 | 15.28% |
| Population with age 35-44 | 14.47% |
| Population with age 45-54 | 13.12% |
| Population with age 55-64 | 13.14% |
| Population with age 65+ | 12.43% |

## Household

| | |
|---|---|
| Total number of households | 23,194 |
| Household size | 2.64 |

## Dwelling

| | |
|---|---|
| Percent: owners | 78.73% |
| Percent: tenants | 21.24% |




## Top Lifestyles

**Cluster D - NEST BUILDERS** **24.84%**

- Renovators
- White Collar Families
- Little Luxuries
- Home & Garden

Typical, middle, urban Canadians who prefer to invest in and renovate (1.3X average) their homes. Average income: $113,935; house value $623,660, and household size 2.76. They are slightly above average in education, working in natural and applied sciences, management, business, finance and administration, social science, education, government service and religion. They have 20% above average of British, Polish and Ukrainian heritages and more like to live in Edmonton, Calgary and Ottawa. Besides home renovation, they read about business, mystery, sports and gardening. Except Golf (24% more) they engage in sports like average Canadian. More entertaining at home. Person's career is not necessarily their first priority. They shop more often than average at Costco.

**Cluster G - UP THE LADDER** **22.50%**

- Young Families
- New Suburbanites
- Kids, Dogs & Station Wagons
- Dynamic Careers

Middle class households in busy life-stage. Income ($89,819) and home value ($502,163) are slightly below the Canadian average. Household size is 2.56. 25% are French and many of them work in the trades, transport and operators. More suburban dwellers with children age under 14, they spend high on healthcare supplies, mortgage and life insurance premiums, childcare. In their precious leisure time, they read more about relationships, interior decorating, work on organic gardening and woodworking. Occasionally they ski. They think an important part of their life and activities is dressing smartly. Enjoy being extravagant, but think no-name products are as good as nationally advertised brands. Like both to go out with friend and entertain at home. Consider career as their first priority.

**Cluster H - HIGH TRADES** **14.30%**

- Skilled Trades
- Secondary Education
- Hardworking
- Family Oriented

# Overview of Fort Sask STA North

## Population

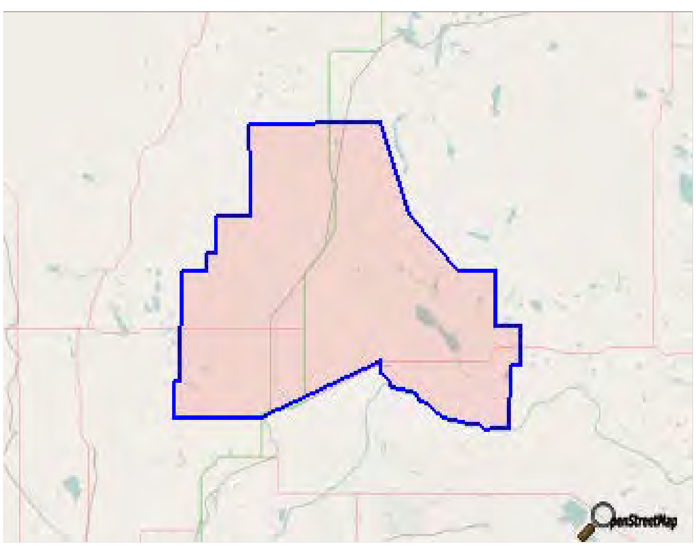
| | |
|---|---|
| Total Population | 3,743 |
| Population with age 0-14 | 14.41% |
| Population with age 15-24 | 9.00% |
| Population with age 25-34 | 9.23% |
| Population with age 35-44 | 10.02% |
| Population with age 45-54 | 13.34% |
| Population with age 55-64 | 18.24% |
| Population with age 65+ | 25.75% |

## Household

| | |
|---|---|
| Total number of households | 1,553 |
| Household size | 2.21 |

## Dwelling

| | |
|---|---|
| Percent: owners | 81.63% |
| Percent: tenants | 18.37% |



## Top Lifestyles

**Cluster I - URBAN LIFE IN SMALL TOWN** **50.75%**

- Service Industry
- Spend On Basics
- Single Parents
- Home & Community

Anglophones in small towns, many in the Atlantic, Prairie, and BC provinces, they tend to work in trades, transportation, heavy equipment and forestry operations, mining, oil and gas extraction and fishing. Many without a fixed work place. Income $86,719, home value $438,285, household size 2.45. They spend more on healthcare supplies, bingos, casinos, slot machines, video lottery terminals and pet, driving to work. They enjoy gardening, playing bingo and the lotteries, and reading history and the Bible. Average on sports, less skiing. Many think young people are too sexually active. Prefer to go shopping at Giant Tiger and discount or online stores. Price is more important than convenience.

**Cluster J - JOYFUL COUNTRY** **38.27%**

- Skilled Trades & Services
- Spend On Basics
- Some Post-Secondary
- Outdoorsy / Crafty / Pickup Trucks

Rural households with large share of Francophone, many reside in Quebec, Maritimes, Manitoba, and Saskatchewan. Income $82,258, home value $366,784, household size 2.47. They spend more than average on house, gardening, recreation vehicles and insurance premiums, gasoline and fuels, medicine, pet and bingo. They give 40% above average to non-religious charitable organizations. They work at home, in primary industry, the trades, transportation and heavy equipment operations. They hunt and fish more than average. When they make a purchase, they often spend more than they thought they would. Like shopping at Giant Tiger, but also online shopping. Looking for convenience, not price. Prefer to postpone a purchase than buy on credit and do more entertaining at home.

**Cluster K - RURAL HANDYMEN** **5.80%**

- Blue Collar
- Larger Common Law Family
- Some Secondary
- Older Homes / Pickup Trucks

# Demographics - Overview Report

## Overview of Fort Sask STA East

### Population

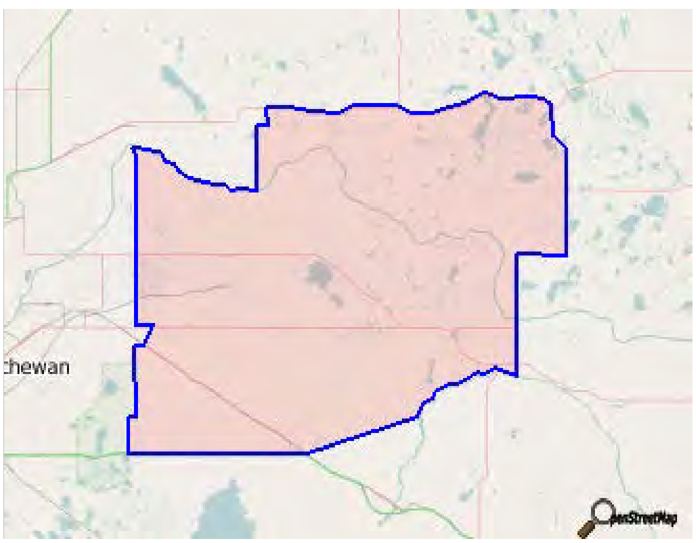
| | |
|---|---|
| Total Population | 9,170 |
| Population with age 0-14 | 18.98% |
| Population with age 15-24 | 12.21% |
| Population with age 25-34 | 9.93% |
| Population with age 35-44 | 9.75% |
| Population with age 45-54 | 11.88% |
| Population with age 55-64 | 16.06% |
| Population with age 65+ | 21.18% |

### Household

| | |
|---|---|
| Total number of households | 3,383 |
| Household size | 2.64 |

### Dwelling

| | |
|---|---|
| Percent: owners | 85.00% |
| Percent: tenants | 15.00% |




### Top Lifestyles

**Cluster K - RURAL HANDYMEN** **51.15%**

- Blue Collar
- Larger Common Law Family
- Some Secondary
- Older Homes / Pickup Trucks

Rural, of French ancestry, they work in the trades, transportation and heavy equipment operations, agriculture, mining, farming, fishing and forestry. Income $75,506, home value $282,100, household size 2.42. More 55+ years old live in old or new large houses, giving a lot to others. They bingo, hunt and fish. Many are farmers in Maritimes, Manitoba and Saskatchewan. When they buy products they look more likely than average for convenience, not price. Shopping more often at Giant Tiger and other community department stores. Often buy more than thought. Prefer to postpone a purchase than buy on credit. Treat no-name products as good as brands. Like to work on community projects. Television is main primary source of entertainment. Rather spend a quiet evening at home than go out to a party.

**Cluster G - UP THE LADDER** **24.61%**

- Young Families
- New Suburbanites
- Kids, Dogs & Station Wagons
- Dynamic Careers

Middle class households in busy life-stage. Income ($89,819) and home value ($502,163) are slightly below the Canadian average. Household size is 2.56. 25% are French and many of them work in the trades, transport and operators. More suburban dwellers with children age under 14, they spend high on healthcare supplies, mortgage and life insurance premiums, childcare. In their precious leisure time, they read more about relationships, interior decorating, work on organic gardening and woodworking. Occasionally they ski. They think an important part of their life and activities is dressing smartly. Enjoy being extravagant, but think no-name products are as good as nationally advertised brands. Like both to go out with friend and entertain at home. Consider career as their first priority.

**Cluster J - JOYFUL COUNTRY** **17.76%**

- Skilled Trades & Services
- Spend On Basics
- Some Post-Secondary
- Outdoorsy / Crafty / Pickup Trucks

# Overview of Fort Saskatchewan (CSD,AB)

## Population

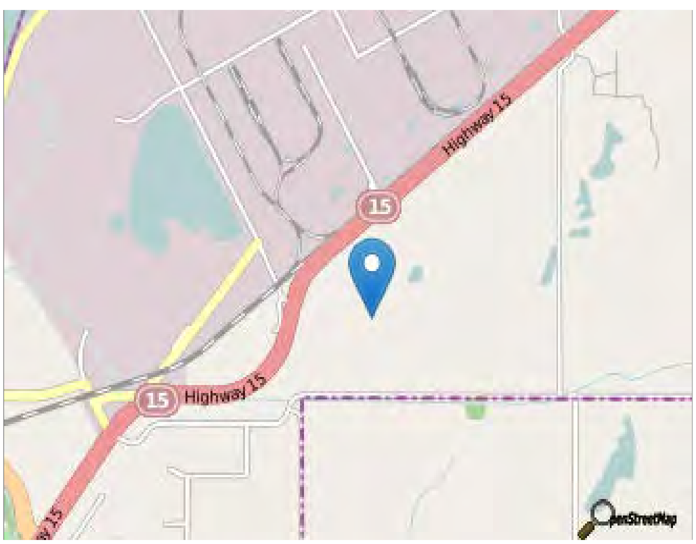
| | |
|---|---|
| Total Population | 27,603 |
| Population with age 0-14 | 20.41% |
| Population with age 15-24 | 11.68% |
| Population with age 25-34 | 17.59% |
| Population with age 35-44 | 15.41% |
| Population with age 45-54 | 12.56% |
| Population with age 55-64 | 11.42% |
| Population with age 65+ | 10.94% |

## Household

| | |
|---|---|
| Total number of households | 10,504 |
| Household size | 2.59 |

## Dwelling

| | |
|---|---|
| Percent: owners | 75.66% |
| Percent: tenants | 24.34% |




## Top Lifestyles

**Cluster D - NEST BUILDERS** **31.73%**

- Renovators
- White Collar Families
- Little Luxuries
- Home & Garden

Typical, middle, urban Canadians who prefer to invest in and renovate (1.3X average) their homes. Average income: $113,935; house value $623,660, and household size 2.76. They are slightly above average in education, working in natural and applied sciences, management, business, finance and administration, social science, education, government service and religion. They have 20% above average of British, Polish and Ukrainian heritages and more like to live in Edmonton, Calgary and Ottawa. Besides home renovation, they read about business, mystery, sports and gardening. Except Golf (24% more) they engage in sports like average Canadian. More entertaining at home. Person's career is not necessarily their first priority. They shop more often than average at Costco.

**Cluster E - BUY ME A NEW HOME** **18.38%**

- Double Earners
- Young Families
- Home Buyers
- Home & Garden

Double earners working hard for their homes (avg. value $629,598), they have income of $112,820. Household size 2.82, they have children aged 0-14, 6 or more persons in household (1.4X ). 15% higher than average having university education, they are white collar workers likely residing in major cities, working in large companies, and are more than 1.5X likely to be Chinese, Portuguese or Greek. Besides paying off their mortgage, they spend more than average on their children's education, some mutual fund and stock, and some travel. They read about home improvement, business, best sellers and sports. Their participation rate in skiing and golf is 20% higher than the average. Like to go out with friends and feel easily being persuaded. Shopping more often than average at the Bay and Costco.

**Cluster B - ELITE PROFESSIONALS** **14.40%**

- Highly Educated
- Techno Savvy
- Urban Families
- Graying Boomers

Photo credit: Kieron Hunt

# 5 retail market supply

## 5.1 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.

## 5.2 REGIONAL RETAIL 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 in the range of 2.5 million sq. ft. of retail space, though at buildout this figure could increase to over 3.0 million sq. ft. Referring to **Figure 5.1**, these include the following:

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

Manning Town Centre is a new regional retail node located approximately 20 kilometers (about 15-20 minute drive) southwest of Fort Saskatchewan and at buildout will have over 1 million sq. ft. of retail. Major retailers in this node include Cabela's, Costco, Sport Chek, Cineplex, and Marshalls. This area also includes the Londonderry Mall.

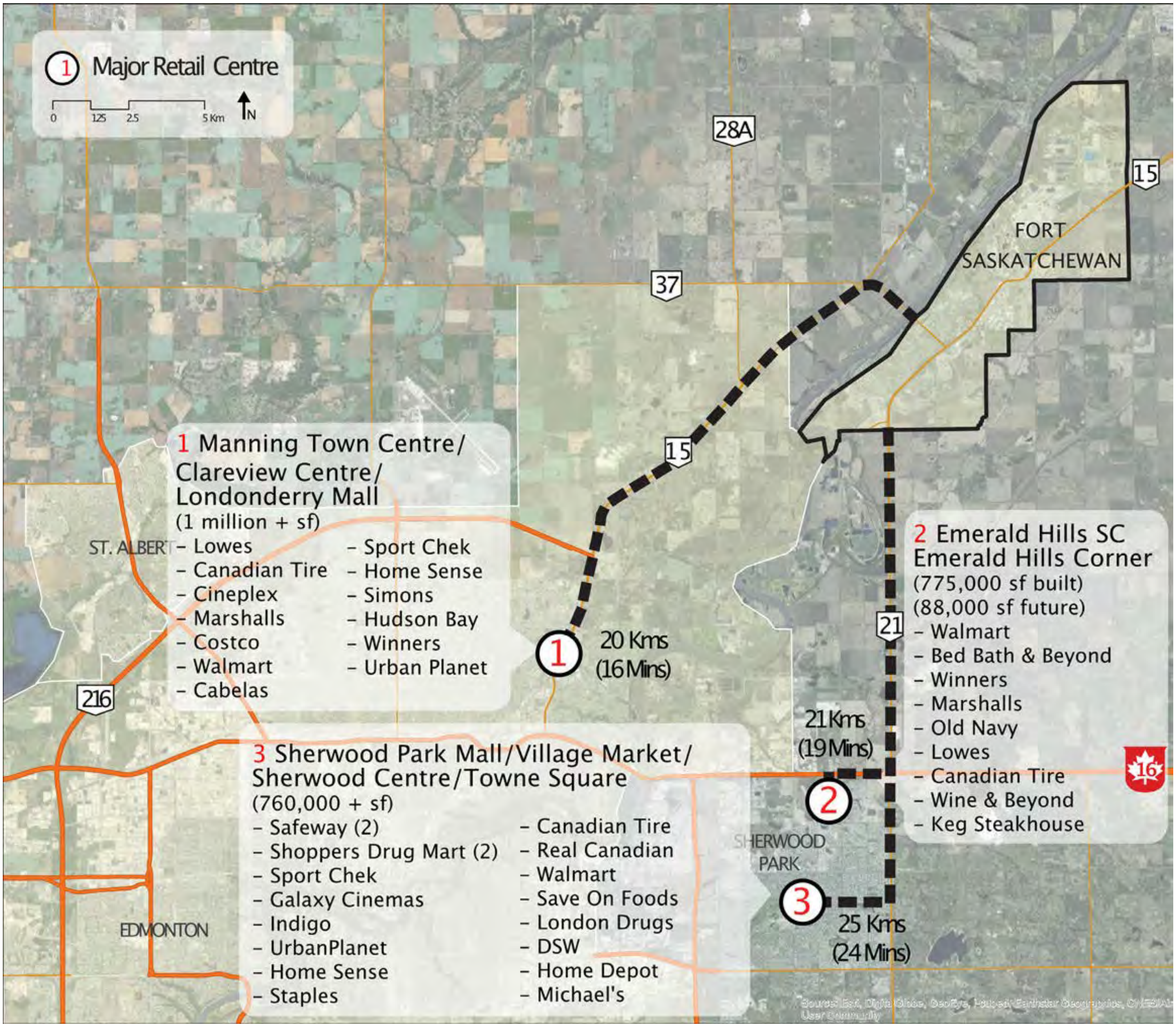
**2. Emerald Hills Centre**

At 21 kilometers away, Emerald Hills Centre is another regional retail node and about 15-20 minute drive time from the City of Fort Saskatchewan. Lowes, Bed Bath & Beyond, Winners, PetSmart, Wine & Beyond and Old Navy are major tenants. Emerald Hills is estimated to be approximately 850,000 sq. ft. at buildout.

Since the 2014 Retail Study for the City of Fort Saskatchewan, Emerald Hills has emerged as the most cited retail node for Fort Saskatchewan residents seeking Comparison merchandise. The Consumer Survey undertaken in this study (refer to Section 8.0) revealed that Emerald Hills garnered 18% of respondents as their "primary comparison shopping centre, behind only Cornerstone Centre in Fort Saskatchewan at 29.0%.

Figure 5.1

## FORT SASKATCHEWAN REGIONAL RETAIL MARKET CONTEXT






CITY OF FORT SASKATCHEWAN

**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. Sherwood Park Mall is a regional enclosed centre located approximately 25 kilometers, or about 25-30 minutes drive from Fort Saskatchewan.

Since 2014, Sherwood Park Mall's prominence as a draw for Fort Saskatchewan residents has declined in favour of more local shopping nodes as well as Emerald Hills.

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.

## 5.3 RETAIL PROJECTS

**Figure 5.2** documents and highlights the major retail nodes and projects in the City of Fort Saskatchewan. This diagram also includes areas of future development.

**Figure 5.2** 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 recently re-developed/re-positioned retail node featuring a variety of local and branded tenants and franchises.

The Fort Mall was a vehicle-oriented suburban retail environment surrounded by lower density residential uses. Commencing in 2015, the redevelopment included the conversion of the formerly enclosed centre to an outward-facing externalized retail environment, with street facing retail units and 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. As of 2019, there is another phase of the site, yet to be redeveloped, but the project continues to progress towards completion.

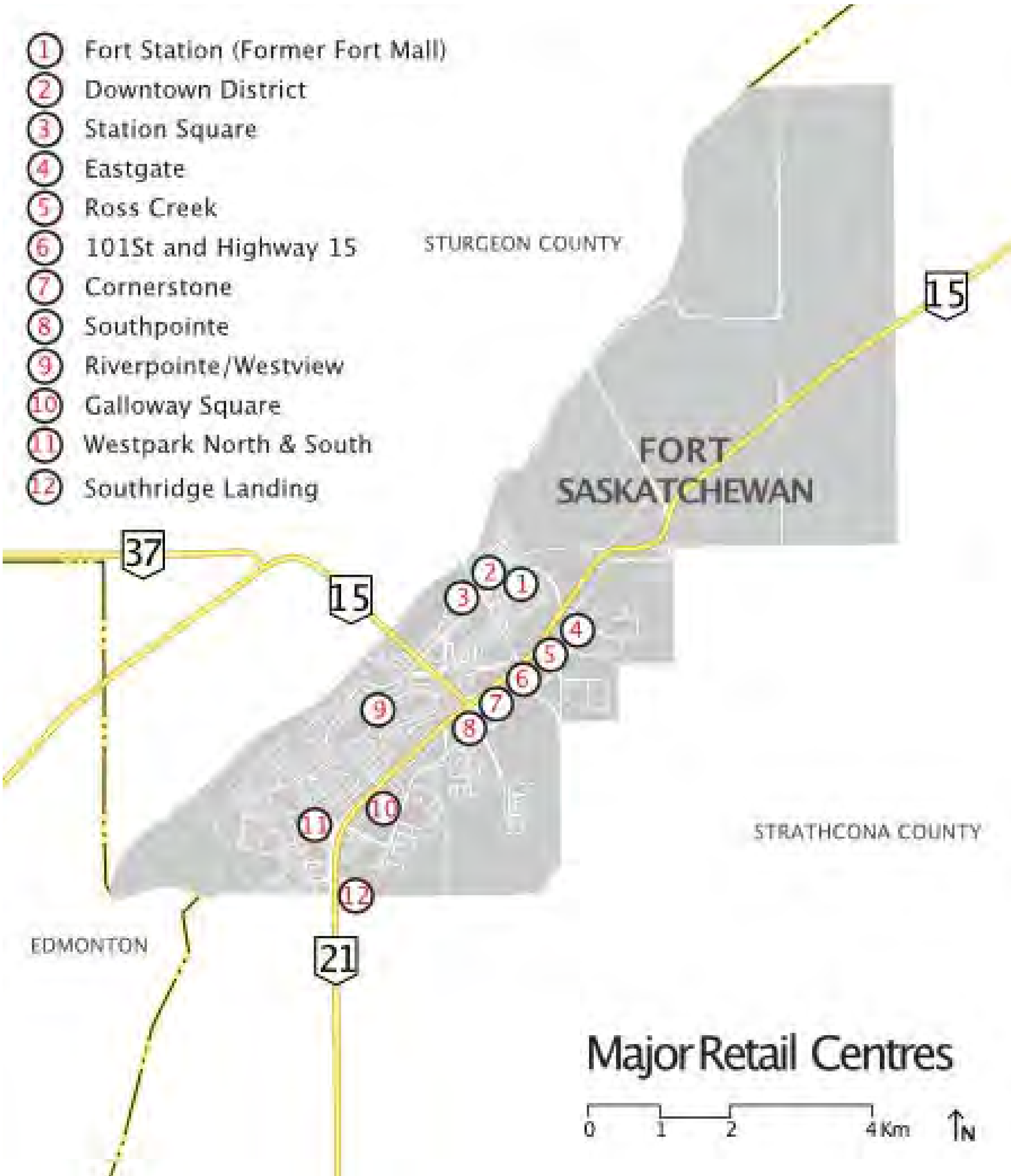
**Downtown District**

Downtown will be profiled in its own section (refer to Section 6.0) but for the purposes of the overall inventory, a summary is provided in the following.

Figure 5.2

## CITY OF FORT SASKATCHEWAN RETAIL INVENTORY & CENTRES

(Source: City of Fort Saskatchewan, Key Planning Strategies & Colliers International Consulting)



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 Redevelopment 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 incentivized 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 susceptible 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 Dollarama.

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 Guardian 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 49% of Consumer Survey respondents' responses.

## Southpointe

This 13.5 hectare (34 acre) development consists of about 197,000 sq. ft. of retail space with national and branded tenants, including Home Depot, Shoppers Drug Mart, Starbucks, Domino's Pizza, and Original Joe's.

Southpointe is one of the most prominent locations for future vehicle-oriented commercial shopping centre growth.

Recent notable retail additions to Southpointe include a 24,000 sq. ft. Goodlife Fitness and Scotia Bank as well as a number of branded smaller CRU tenants comprising predominantly quick-service food & beverage.

## 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.

## Galloway Square & Town Crest

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).

Immediately to the east of Galloway Square is a new retail centre; Town Crest that opened in 2017/2018 totaling approximately 22,000 sq. ft.

## 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. At build-out Westpark will be a mixture of neighbourhood-serving and community-scale retail tenants.

Notable tenants that have opened at Westpark in the last couple years include Shoppers Drug Mart, Canadian Brewhouse and Freson Bros. Grocery.

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.

# 1.30 million sf

## CITY OF FORT SASKATCHEWAN'S RETAIL INVENTORY

**Southridge Landing**

Located at the southern edge of town at the highly volume intersection of Hwy 21 and Southridge Blvd, this 6.5 ac retail node comprises a total of 56,000 sq. ft. of space at buildout.

On the opposite side of Hwy 21 to the Southridge Landing project is another 8.44 acre site currently under site construction and zoned C-2 for vehicle oriented retail and services.

5.4
## CITYWIDE RETAIL INVENTORY

To document the retail inventory for the City of Fort Saskatchewan, Key Planning & Colliers 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.

The inventory was categorized into the same merchandise categories that were profiled in the retail spending so that a direct comparison could be taken.

Table 5.1
### CITY OF FORT SASKATCHEWAN RETAIL INVENTORY

(Source: City of Fort Saskatchewan & Key Planning Strategies)

| | | |
|---|---|---|
| TOTAL | 1,508,889 | sq. ft. |
| TOTAL RETAIL ONLY | 1,305,121 | sq. ft. |
| VACANT NEW | 61,487 | sq. ft. |
| VACANT | 101,627 | sq. ft. |
| % VACANT (excluding VACANT NEW) | 4.1% | |
| % VACANT (ALL) | 10.8% | |

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 5.1 and 5.2**, the City of Fort Saskatchewan has an estimated retail floorspace of approximately 1.30 million sq. ft. (an increase from 1.19 million in 2016).

In this inventory, 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. 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 City of Fort Saskatchewan in both inventory and trade area demographics 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. The City has optimal lands in the Southridge and Southpointe areas that would be well-suited to attract new-to-market retailers.



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# 5.3%

## CITY OF FORT SASKATCHEWAN'S RETAIL VACANCY WHEN EXCLUDING NEW RETAIL SPACE UNDER CONSTRUCTION

5.5
## RETAIL INVENTORY BY NODE

Based on fieldwork and inventory, Fort Saskatchewan's Retail environment was allocated into four nodes as shown in **Figure 5.3**. 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 1.30 million sq. ft. of traditional retail including vacancy:

- CENTRAL 709,944 sf
- DOWNTOWN 304,011 sf
- SOUTH 254,502 sf
- WEST 36,664 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 5.2, Figures 5.3 and 5.4** provide a breakdown of the 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.

Table 5.2
## RETAIL INVENTORY BY CATEGORY & NODE

(Source: City of Fort Saskatchewan, Key Planning Strategies)

| Merchandise Category | Existing Inventory (SF) | Existing Inventory (%) | CENTRAL | DOWNTOWN | SOUTH | WEST |
|---|---|---|---|---|---|---|
| Grocery & Specialty Foods | 206,967 | 13.7% | 119,591 | 40,480 | 46,897 | 0 |
| Convenience Store | 23,255 | 1.5% | 3,732 | 6,647 | 8,734 | 4,142 |
| Alcohol & Tobacco | 39,722 | 2.6% | 16,713 | 6,004 | 11,575 | 5,431 |
| Pharmacy | 61,159 | 4.1% | 23,495 | 7,233 | 28,732 | 1,700 |
| Personal Services | 50,802 | 3.4% | 10,526 | 27,253 | 6,257 | 6,766 |
| Clothing & Apparel | 79,891 | 5.3% | 61,552 | 18,339 | 0 | 0 |
| Footwear | 2,500 | 0.2% | 2,500 | 0 | 0 | 0 |
| Jewelry & Accessories | 6,019 | 0.4% | 2,000 | 4,019 | 0 | 0 |
| Health & Beauty | 11,199 | 0.7% | 4,000 | 1,500 | 2,175 | 3,524 |
| Home Electronics & Appliances | 20,744 | 1.4% | 16,455 | 4,289 | 0 | 0 |
| Home Furnishings & Accessories | 33,507 | 2.2% | 28,757 | 4,750 | 0 | 0 |
| Home Improvement & Gardening | 131,567 | 8.7% | 127,695 | 3,872 | 0 | 0 |
| Books & Multi-Media | 1,000 | 0.1% | 1,000 | 0 | 0 | 0 |
| Sporting Goods & Outdoor Recreation | 21,976 | 1.5% | 21,976 | 0 | 0 | 0 |
| Toys & Hobbies | 12,698 | 0.8% | 12,000 | 698 | 0 | 0 |
| Specialty Retail | 88,472 | 5.9% | 49,186 | 34,030 | 4,301 | 955 |
| Full Service F&B | 65,878 | 4.4% | 25,190 | 18,385 | 18,484 | 3,818 |
| Limited Service F&B | 68,610 | 4.5% | 35,926 | 8,384 | 21,417 | 2,883 |
| Drinking Establishment | 15,691 | 1.0% | 2,176 | 6,925 | 6,590 | 0 |
| Arts & Entertainment | 23,210 | 1.5% | 4,618 | 18,592 | 0 | 0 |
| Fitness & Leisure | 46,300 | 3.1% | 25,000 | 10,500 | 4,800 | 6,000 |
| Auto Parts & Accessories | 60,243 | 4.0% | 49,969 | 10,274 | 0 | 0 |
| Auto/RV/Motorsports Dealership | 60,764 | 4.0% | 36,635 | 0 | 24,129 | 0 |
| Auto Service | 9,833 | 0.7% | 1,375 | 6,947 | 1,510 | 0 |
| Professional Services | 158,876 | 10.5% | 41,848 | 100,871 | 9,300 | 6,856 |
| Child Care Services | 34,142 | 2.3% | 0 | 21,307 | 9,835 | 3,000 |
| Public Service | 4,250 | 0.3% | 0 | 4,250 | 0 | 0 |
| Institutional | 6,500 | 0.4% | 3,000 | 3,500 | 0 | 0 |
| **VACANT NEW** | 61,487 | 4.1% | 5,000 | 0 | 56,487 | 0 |
| **VACANT** | 101,627 | 6.7% | 22,876 | 64,890 | 12,414 | 1,446 |
| **TOTAL ALL STREET LEVEL** | **1,508,889** | **100.0%** | **754,792** | **433,940** | **273,637** | **46,520** |
| **TOTAL RETAIL ONLY** | **1,305,121** | | **709,944** | **304,011** | **254,502** | **36,664** |
| | | | **50.0%** | **28.8%** | **18.1%** | **3.1%** |



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Figure 5.3
RETAIL NODES
(Source: Key Planning Strategies)

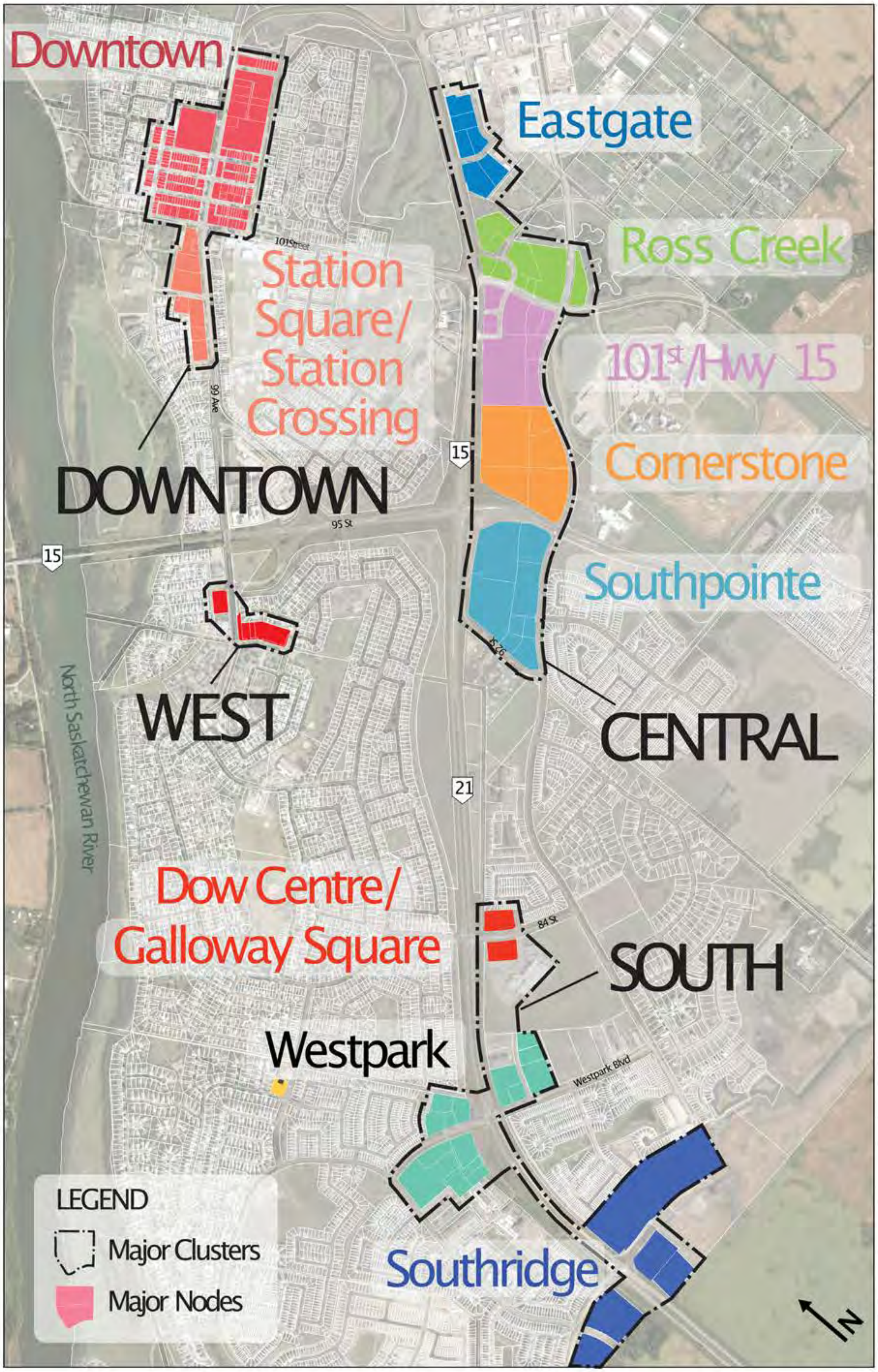

Figure 5.4

## RETAIL NODES - INVENTORY "BUBBLE" SUMMARY

(Source: Key Planning Strategies)

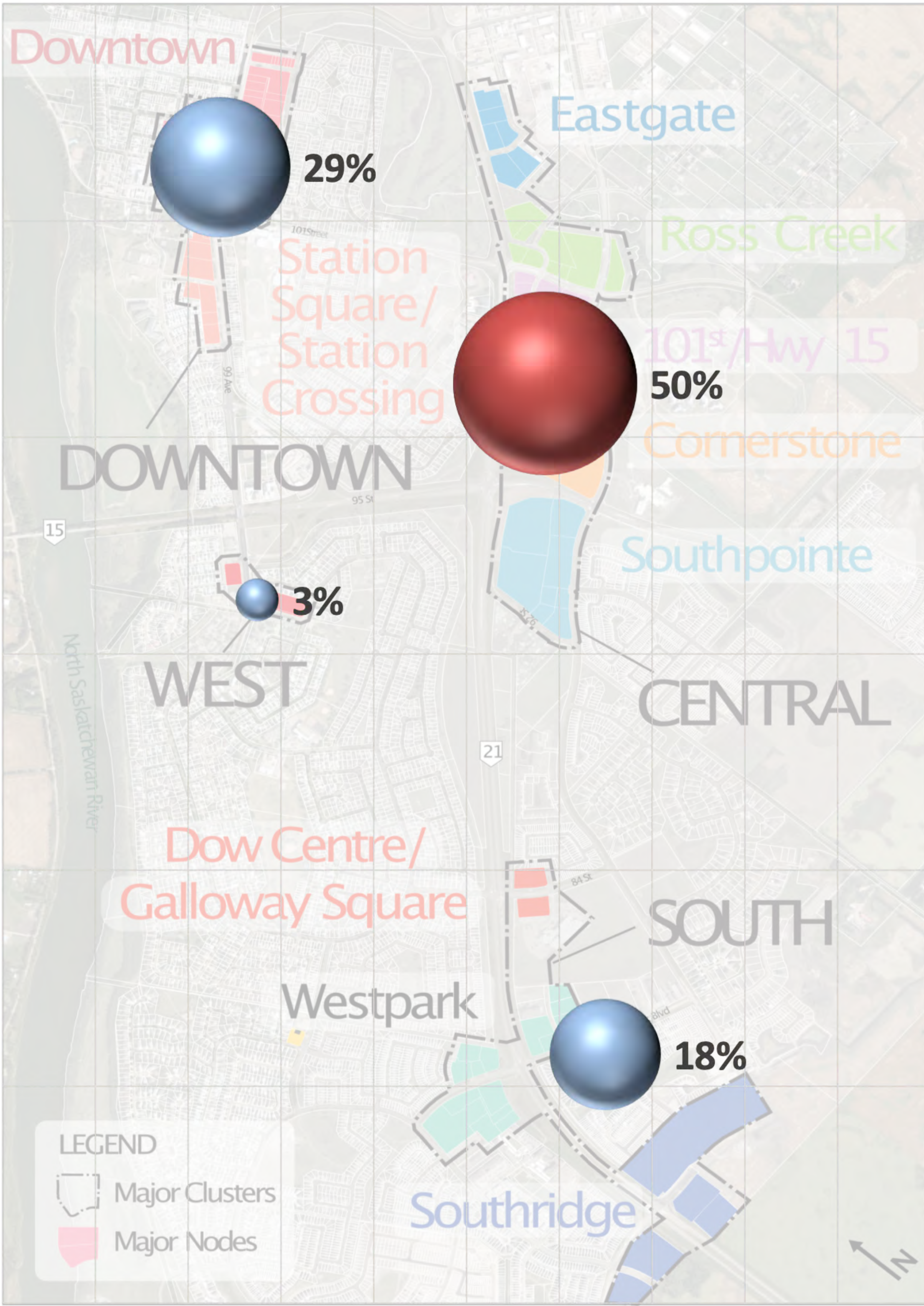

Figure 5.5

## REPRESENTATIVE CITY RETAIL IMAGERY

(Source: Key Planning Strategies)

# 291,300 sf

## AMOUNT OF GROCERY/PHARMACY FLOORSPACE IN CITY

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 almost 120,000 sq. ft. or 16% of the total Central node floorspace. This is further validation as to why Consumer Survey respondents see this area as their Primary Convenience node and recently has become, other than Emerald Hills, the primary Comparison shopping node for DSTM goods.

The **Downtown** node's largest retail category is Personal Services which currently accounts for 23% 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.

The **South** retail node continues to see notable growth. New developments include Freson Bros. Market, Shoppers Drug Mart, Canadian Brewhouse and Wendy's in the WestPark Centre. 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, new or recently completed space actively being leased represents a significant amount of the inventory. Being located on the heavily-trafficked southern entrance to the City creates a highly desirable location for these uses.

With the number of new developments either under construction or proposed in the City and in the south specifically, an increase in new, 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.

5.6
## RETAIL INVENTORY BY CATEGORY

Categories of retail were also incorporated into the overall inventory list as shown in **Figures 5.6**. 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.

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

1. *Grocery & Specialty Foods* *230,222 sf*
2. *Home Improvement* *131,567 sf*
3. *Specialty Retail* *89,972 sf*
4. *Clothing and Apparel* *79,891 sf*
5. *Full Service Restaurants* *65,878 sf*

Newer developments/redevelopments such as those identified in **Figure 5.2** (e.g. Cornerstone/ Southpointe, Westpark) have the potential to create a better foundation for success for both local and branded tenants.



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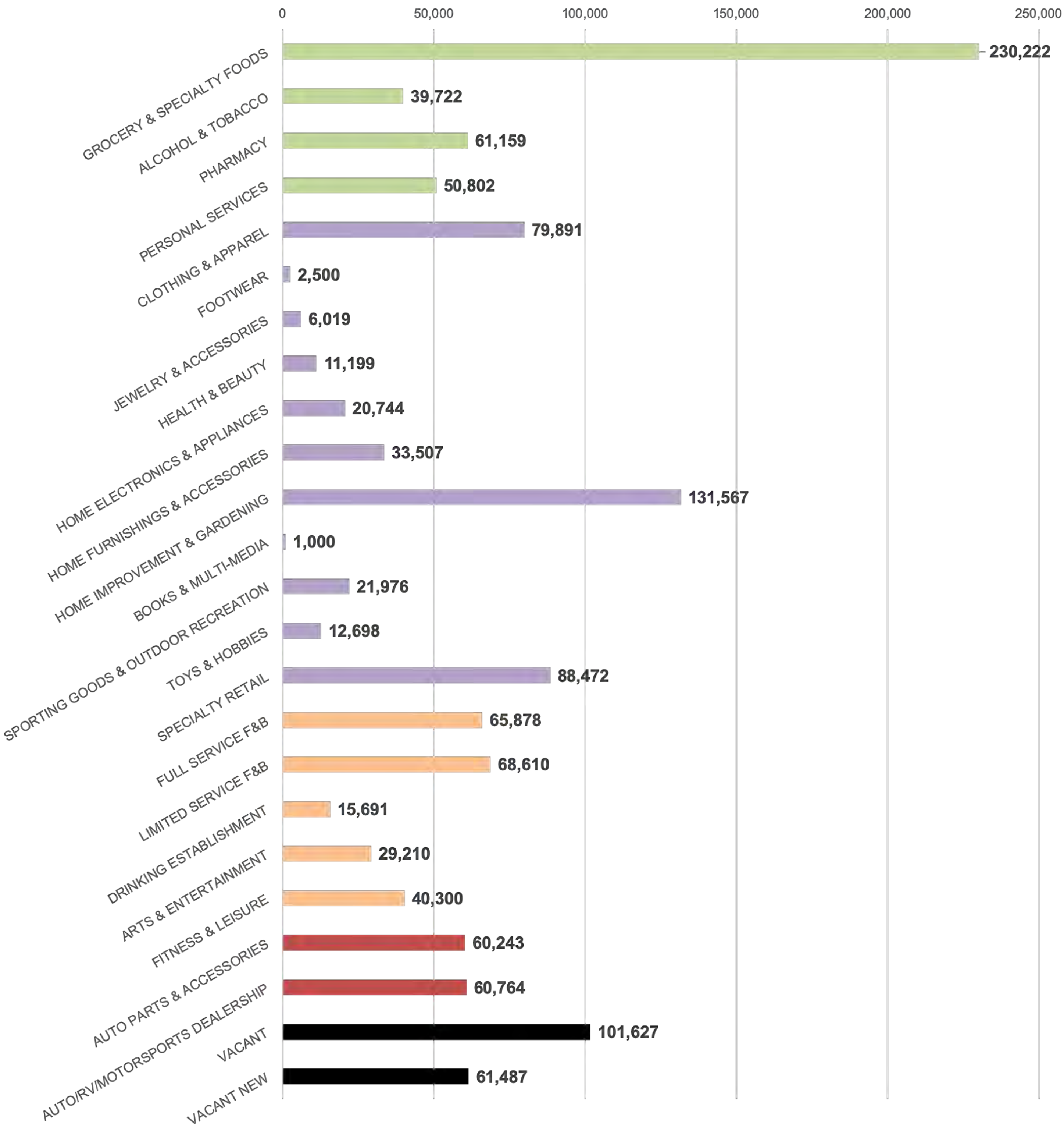
Figure 5.6

## CITY OF FORT SASKATCHEWAN RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Key Planning Strategies)



# 754,792 sf

## AMOUNT OF SQUARE FOOTAGE IN CENTRAL AREA "PRIMARY CONVENIENCE & COMPARISON SHOPPING AREA"

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. Fort Saskatchewan is proving that it can compete with other regional nodes like those in Strathcona, although Emerald Hills is the strongest competition at the moment against which Fort Saskatchewan must work to position itself.

The majority of categories which show a low level of inventory include Jewelry & Accessories (6,019 sq. ft.), Footwear (2,500 sq. ft.) and Books & Media (1,000 sq. ft.). Together these three categories make up less than 1.0% (0.6%) 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.

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, which has undergone 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.

5.7

## 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).

Table 5.3

## RETAIL INVENTORY SUMMARY BY NODE & VACANCY

(Source: Key Planning Strategies)

| Node/Neighbourhood | Existing Inventory (SF) | Existing Inventory (%) | Existing Vacancy (SF) | Existing Vacancy (%) |
|---|---|---|---|---|
| CENTRAL | 754,792 | 50% | 27,876 | 3.7% |
| DOWNTOWN | 433,940 | 29% | 64,890 | 15.0% |
| SOUTH | 273,637 | 18% | 68,901 | 25.2% |
| WEST | 46,520 | 3% | 1,446 | 3.1% |
| | | | | |
| **TOTAL** | **1,508,889** | **100%** | **163,114** | **10.8%** |

Figure 5.7

## RETAIL NODES - VACANCY “BUBBLE” SUMMARY

(Source: Key Planning Strategies)

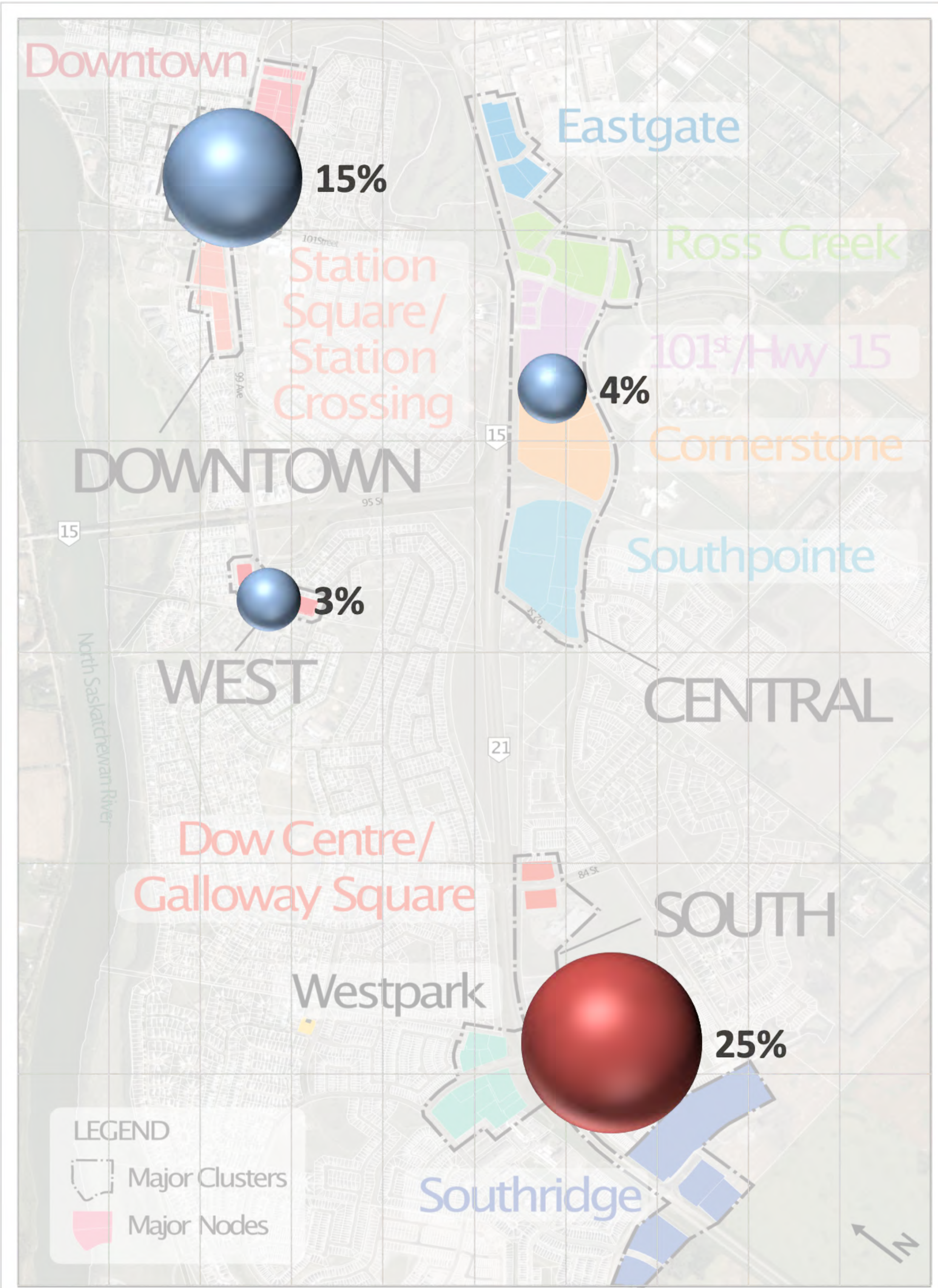





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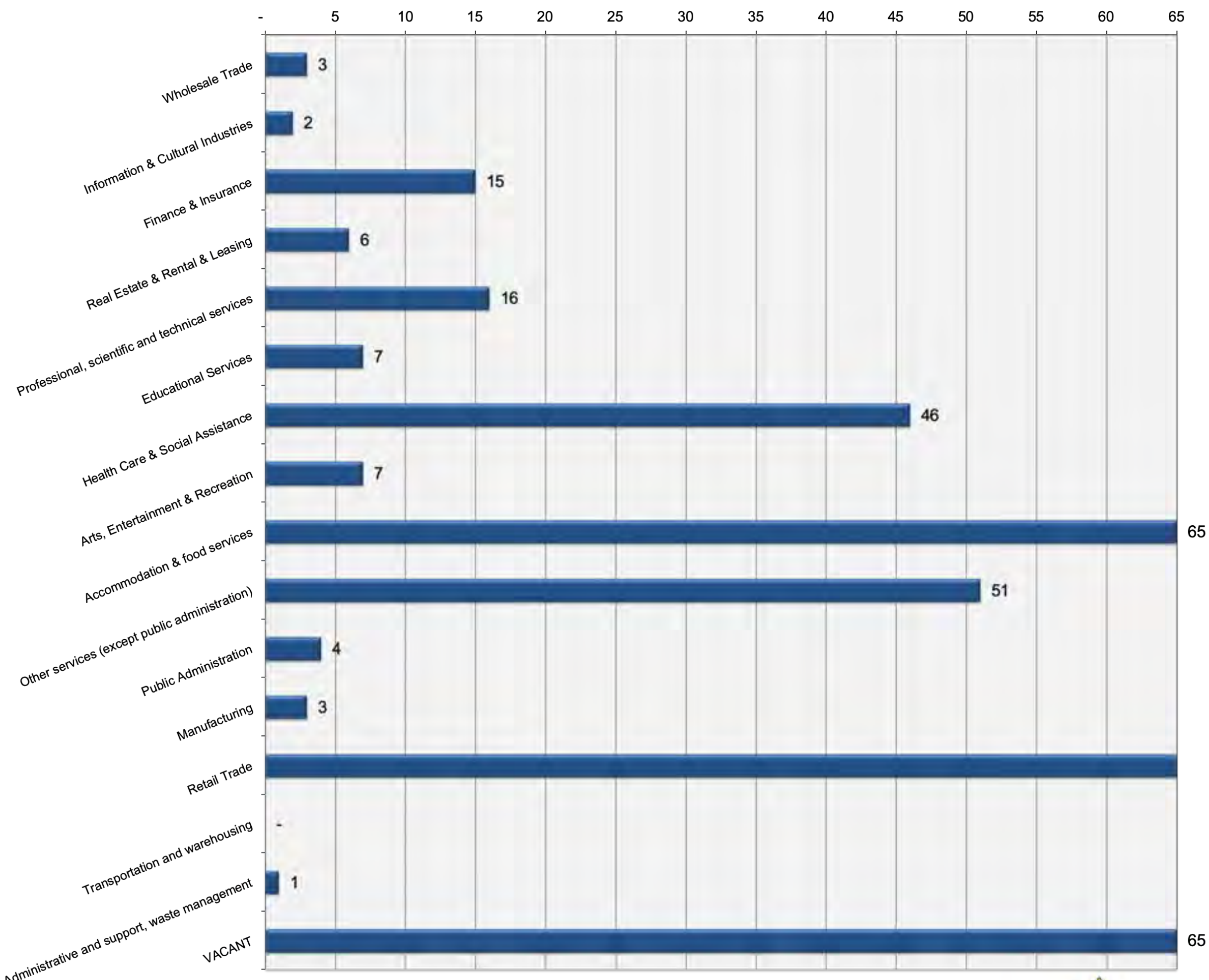
Figure5.8

## CITY OF FORT SASKATCHEWAN RETAIL INVENTORY BY NAICS CLASSIFICATION

(Source: Statistics Canada 2018 and Key Planning Strategies 2019)

| NAICS CLASSIFICATION | NAICS | Number of Businesses | Business Breakdown |
|---|---|---|---|
| Wholesale Trade | 41 | 3 | 0.8% |
| Information & Cultural Industries | 51 | 2 | 0.5% |
| Finance & Insurance | 52 | 15 | 3.9% |
| Real Estate & Rental & Leasing | 53 | 6 | 1.6% |
| Professional, scientific and technical services | 54 | 16 | 4.1% |
| Educational Services | 61 | 7 | 1.8% |
| Health Care & Social Assistance | 62 | 46 | 11.9% |
| Arts, Entertainment & Recreation | 71 | 7 | 1.8% |
| Accommodation & food services | 72 | 65 | 16.8% |
| Other services (except public administration) | 81 | 51 | 13.2% |
| Public Administration | 91 | 4 | 1.0% |
| Manufacturing | 31-33 | 3 | 0.8% |
| Retail Trade | 44-45 | 95 | 24.6% |
| Transportation and warehousing | 48-49 | - | 0.0% |
| Administrative and support, waste management | 56 | 1 | 0.3% |
| VACANT | n/a | 65 | 16.8% |
| | | | |
| **TOTAL** | | **386** | **100.0%** |



# 43 sf

## RATIO OF FLOORSPACE PER CAPITA IN CITY (including vacant space)

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 42.7, which suggests the City is well-positioned to grow as a regional market, but that growth should be cautious so as to avoid becoming over-retailed.

This figure includes vacancies, 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.

5.8
## 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 1 hour drive, primarily north, northeast 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 1.30 million sq. ft. and a vacancy of just over 4.0% (excluding new space actively being leased or under construction) which suggests a relatively 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 biggest threat to Fort Saskatchewan's retail outlook is the newer developing projects at Emerald Hills and Manning Town Centre, which survey respondents have indicated is their primary comparison shopping locale.

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.

Fort Saskatchewan is at a point in its growth where tenants should be targeted for quality over quantity and thus target very specific and desired tenants that match the gaps and demographic profile.

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.



CITY OF FORT SASKATCHEWAN

Photo credit: Kieron Hunt

# 6 RETAIL DEMAND & GAP ANALYSIS

## 6.1
## 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.

## 6.2
## RETAIL FLOORSPACE DEMAND BY TRADE AREA SEGMENT

**Tables 6.1 through 6.7** 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 large 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 and "online". 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.

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

Starting with **Table 6.1**, the City of Fort Saskatchewan Primary trade area is quantified to determine, based on expenditure and market shares, just how much retail space the PTA's 63,032 residents could reasonably justify, not taking into account inflow of any kind.

**Table 6.1** illustrates the demand resulting from the Primary Trade Area, which includes the City of Fort Saskatchewan, and other neighbouring residents as delineated in the Primary Trade Area. The figures reveal demand for approximately 1.32 million sq. ft. of retail at a retained market share of approximately 50%.

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 50% of total City of Fort Saskatchewan resident spending is retained in the City of Fort Saskatchewan. The remaining 60% is considered outflow and spent elsewhere in Sherwood Park, Strathcona County, or the City of Edmonton or through online purchases such as Amazon, Wayfair or through specific omni-channel retailers.



CITY OF FORT SASKATCHEWAN

TABLE 6.1

## PTA RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2018 | | | |
|---|---|---|---|---|
| | PTA Incl Fort Sask Retail Sales Productivity ($psf) | Inflow & Retained Market Share | Inflow & Retained Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $550 | 76% | $184,573,770 | 335,589 |
| Pharmacy | $550 | 80% | $15,140,208 | 27,528 |
| Alcohol & Tobacco | $500 | 83% | $30,824,571 | 61,649 |
| Personal Services | $200 | 68% | $25,572,684 | 127,863 |
| Clothing & Apparel | $275 | 28% | $16,609,873 | 60,400 |
| Footwear | $275 | 28% | $5,680,628 | 20,657 |
| Jewelry & Accessories | $500 | 35% | $3,868,110 | 7,736 |
| Health & Beauty | $450 | 74% | $16,579,999 | 36,844 |
| Home Furniture & Décor | $275 | 30% | $9,610,295 | 34,947 |
| Home Electronics & Appliances | $450 | 31% | $36,117,117 | 80,260 |
| Home Improvement & Gardening | $225 | 75% | $27,291,893 | 121,297 |
| Books & Media | $200 | 9% | $3,189,639 | 15,948 |
| Sporting Goods | $250 | 40% | $3,535,879 | 14,144 |
| Toys & Hobbies | $250 | 40% | $3,406,967 | 13,628 |
| Specialty Retail | $250 | 42% | $6,092,948 | 24,372 |
| Quick Service F&B | $550 | 77% | $7,926,781 | 14,412 |
| Full Service Restaurants | $450 | 50% | $32,006,607 | 71,126 |
| Arts & Entertainment | $175 | 40% | $10,957,449 | 62,614 |
| Drinking Establishments | $500 | 40% | $2,317,034 | 4,634 |
| Fitness & Leisure | $200 | 59% | $7,325,918 | 36,630 |
| Auto Parts & Accessories | $375 | 59% | $10,370,455 | 27,655 |
| Auto/RV/Motorsports Dealerships | $450 | 29% | $56,113,847 | 124,697 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$389** | **50.1%** | **$515,112,670** | **1,324,629** |

TABLE 6.2

## STA NORTH RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2018 | | | |
|---|---|---|---|---|
| | STA NORTH Retail Sales Productivity ($psf) | Inflow Market Share | Inflow Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $550 | 69% | $10,695,513 | 19,446 |
| Pharmacy | $550 | 72% | $871,100 | 1,584 |
| Alcohol & Tobacco | $500 | 74% | $1,533,877 | 3,068 |
| Personal Services | $200 | 61% | $1,313,335 | 6,567 |
| Clothing & Apparel | $275 | 25% | $742,539 | 2,700 |
| Footwear | $275 | 25% | $253,342 | 921 |
| Jewelry & Accessories | $500 | 31% | $173,614 | 347 |
| Health & Beauty | $450 | 67% | $807,787 | 1,795 |
| Home Furniture & Décor | $275 | 27% | $535,652 | 1,948 |
| Home Electronics & Appliances | $450 | 28% | $1,776,607 | 3,948 |
| Home Improvement & Gardening | $225 | 67% | $1,680,238 | 7,468 |
| Books & Media | $200 | 8% | $139,756 | 699 |
| Sporting Goods | $250 | 36% | $164,801 | 659 |
| Toys & Hobbies | $250 | 36% | $169,241 | 677 |
| Specialty Retail | $250 | 37% | $366,589 | 1,466 |
| Quick Service F&B | $550 | 69% | $402,538 | 732 |
| Full Service Restaurants | $450 | 45% | $1,574,425 | 3,499 |
| Arts & Entertainment | $175 | 36% | $576,867 | 3,296 |
| Drinking Establishments | $500 | 36% | $111,257 | 223 |
| Fitness & Leisure | $200 | 53% | $352,192 | 1,761 |
| Auto Parts & Accessories | $375 | 53% | $522,555 | 1,393 |
| Auto/RV/Motorsports Dealerships | $450 | 26% | $2,844,415 | 6,321 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$392** | **46.4%** | **$27,608,238** | **70,518** |

TABLE 6.3

## STA EAST RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2018 | | | |
|---|---|---|---|---|
| | STA EAST Retail Sales Productivity ($psf) | Inflow Market Share | Inflow Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $550 | 61% | $19,277,070 | 35,049 |
| Pharmacy | $550 | 64% | $1,792,557 | 3,259 |
| Alcohol & Tobacco | $500 | 66% | $2,748,501 | 5,497 |
| Personal Services | $200 | 54% | $2,290,567 | 11,453 |
| Clothing & Apparel | $275 | 22% | $1,339,987 | 4,873 |
| Footwear | $275 | 22% | $456,694 | 1,661 |
| Jewelry & Accessories | $500 | 28% | $314,635 | 629 |
| Health & Beauty | $450 | 59% | $1,437,964 | 3,195 |
| Home Furniture & Décor | $275 | 24% | $841,853 | 3,061 |
| Home Electronics & Appliances | $450 | 25% | $3,295,231 | 7,323 |
| Home Improvement & Gardening | $225 | 60% | $2,931,177 | 13,027 |
| Books & Media | $200 | 7% | $184,874 | 924 |
| Sporting Goods | $250 | 32% | $258,940 | 1,036 |
| Toys & Hobbies | $250 | 32% | $305,141 | 1,221 |
| Specialty Retail | $250 | 33% | $624,475 | 2,498 |
| Quick Service F&B | $550 | 61% | $725,402 | 1,319 |
| Full Service Restaurants | $450 | 40% | $2,854,906 | 6,344 |
| Arts & Entertainment | $175 | 32% | $1,013,596 | 5,792 |
| Drinking Establishments | $500 | 32% | $199,272 | 399 |
| Fitness & Leisure | $200 | 47% | $624,864 | 3,124 |
| Auto Parts & Accessories | $375 | 47% | $919,851 | 2,453 |
| Auto/RV/Motorsports Dealerships | $450 | 24% | $4,920,495 | 10,934 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$395** | **41.7%** | **$49,358,054** | **125,072** |

TABLE 6.4

## MISCELLANEOUS SEGMENTS RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2018 | | | |
|---|---|---|---|---|
| | MISCELLANEOUS | Inflow Market Share | Inflow Sales $ | Floorspace Demand (sf) |
| Grocery & Specialty Foods | $550 | 10% | $21,454,635 | 39,008 |
| Pharmacy | $550 | 5% | $890,193 | 1,619 |
| Alcohol & Tobacco | $500 | 2% | $702,139 | 1,404 |
| Personal Services | $200 | 5% | $1,458,829 | 7,294 |
| Clothing & Apparel | $275 | 5% | $934,620 | 3,399 |
| Footwear | $275 | 2% | $127,813 | 465 |
| Jewelry & Accessories | $500 | 2% | $87,127 | 174 |
| Health & Beauty | $450 | 2% | $376,515 | 837 |
| Home Furniture & Décor | $275 | 2% | $219,756 | 799 |
| Home Electronics & Appliances | $450 | 2% | $823,779 | 1,831 |
| Home Improvement & Gardening | $225 | 2% | $638,066 | 2,836 |
| Books & Media | $200 | 0% | $0 | 0 |
| Sporting Goods | $250 | 2% | $79,192 | 317 |
| Toys & Hobbies | $250 | 2% | $77,627 | 311 |
| Specialty Retail | $250 | 5% | $354,201 | 1,417 |
| Quick Service F&B | $550 | 10% | $905,472 | 1,646 |
| Full Service Restaurants | $450 | 2% | $728,719 | 1,619 |
| Arts & Entertainment | $175 | 2% | $250,958 | 1,434 |
| Drinking Establishments | $500 | 0% | $0 | 0 |
| Fitness & Leisure | $200 | 0% | $0 | 0 |
| Auto Parts & Accessories | $375 | 5% | $590,643 | 1,575 |
| Auto/RV/Motorsports Dealerships | $450 | 2% | $1,277,575 | 2,839 |
| **TOTAL RETAIL CATEGORIES ONLY** | **$452** | **5.4%** | **$31,977,861** | **70,823** |

TABLE 6.5

## TOTAL TRADE AREA RETAIL FLOORSPACE DEMAND

| Retail Spending by Merchandise Category | 2018 Total Floorspace Demand (sf) | Current City Retail Inventory (sf) | Total Residual Demand (sf) |
|---|---|---|---|
| Grocery & Specialty Foods | 429,093 | 230,222 | -198,871 |
| Pharmacy | 33,989 | 61,159 | 27,170 |
| Alcohol & Tobacco | 71,618 | 39,722 | -31,896 |
| Personal Services | 153,177 | 50,802 | -102,375 |
| Clothing & Apparel | 71,371 | 79,891 | 8,520 |
| Footwear | 23,704 | 2,500 | -21,204 |
| Jewelry & Accessories | 8,887 | 6,019 | -2,868 |
| Health & Beauty | 42,672 | 11,199 | -31,473 |
| Home Furniture & Décor | 40,755 | 33,507 | -7,247 |
| Home Electronics & Appliances | 93,362 | 20,744 | -72,617 |
| Home Improvement & Gardening | 144,628 | 131,567 | -13,061 |
| Books & Media | 17,571 | 1,000 | -16,571 |
| Sporting Goods | 16,155 | 21,976 | 5,820 |
| Toys & Hobbies | 15,836 | 12,698 | -3,138 |
| Specialty Retail | 29,753 | 89,972 | 60,219 |
| Quick Service F&B | 18,109 | 68,610 | 50,501 |
| Full Service Restaurants | 82,588 | 65,878 | -16,711 |
| Arts & Entertainment | 73,136 | 23,210 | -49,926 |
| Drinking Establishments | 5,255 | 15,691 | 10,436 |
| Fitness & Leisure | 41,515 | 62,300 | 20,785 |
| Auto Parts & Accessories | 33,076 | 60,243 | 27,167 |
| Auto/RV/Motorsports Dealerships | 144,792 | 60,764 | -84,027 |
| **TOTAL RETAIL CATEGORIES ONLY** | **1,591,042** | **1,149,674** | **-441,369** |
| | **Including Vacant space** | **146,914** | **-294,455** |



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The resulting figures in **Table 6.1** depict a market that retains strong market share for conveniences and necessity goods with market shares in excess of 70%, but much of the DSTM or Comparison Goods purchases continue to be made outside of Fort Saskatchewan, as evidenced by the market shares that tend to average in the 25% to 35% range.

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 has 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.

To account for spending inflow originating outside of the City of Fort Saskatchewan, Key Planning also quantified the Secondary Trade Areas, which are less populated, but still provide somewhat regular and loyal patronage to the City.

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 North 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, although the market share remains quite strong. 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 6.2** reveals the demand for floorspace in the City of Fort Saskatchewan attributable to residents in the STA North at approximately 70,518 sq. ft. at a market share of 46.4%.

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

**Table 6.3** reveals the demand for floorspace in the City of Fort Saskatchewan attributable to residents in the STA East at approximately 125,072 sq. ft. at a market share of 41.7%.

The STA East also has a relatively high market share because much of the consumer base from the STA East often has to pass through the City of Fort Saskatchewan and thus can be intercepted or more conveniently accommodated by the City's shops and services. Fort Saskatchewan has also continued to increase its retail offering whereby now even residents further out in the STA East can access Fort Saskatchewan more easily for goods and services without having to go into Edmonton or Sherwood Park, except for larger ticket or bulk items.

***Miscellaneous Inflow Supply - Demand***

As noted in the Demographic Section, Fort Saskatchewan also benefits from miscellaneous sources of business by way of commuter workforce, temporary residents, passing motorists as well as less frequent consumers from areas outside of the defined STAs like Athabasca, Lac La Biche, St Paul or Vegreville.

Accordingly, and based on an estimated miscellaneous inflow of 5.4 % market share of their total spending, **Table 6.4** reveals that part time residents could justify demand for approximately 70,823 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 Trade Area Supply - Demand*

**Table 6.5** aggregates the total demand for floorspace in the City of Fort Saskatchewan attributable to residents of the Primary and Secondary Trade Areas and Miscellaneous Inflow at approximately 1,591,042 sq. ft.

When compared against the current city's occupied retail inventory or supply at 1,149,674 sq. ft., the difference between demand and supply equates to almost 441,369 sq. ft. of retail space. In other words, the City has in the range of 450,000 sq. ft. unmet retail demand or space.

If one factors into the equation forecasted population growth in the Primary Trade Area of approximately 19,323 over the next decade to 2028 (the majority of which will be in the City of Fort Saskatchewan), then estimated future floorspace demand could grow by approximately 386,460 sq. ft. (if applying a conservative per capita ratio of 20 sf per capita). This estimate is based on growth in retail consistent levels of retail spending and market share of **total** spending at 50%.

Thus in total, when considering residual demand plus future demand over the next decade, the City of Fort Saskatchewan could grow by as much as 828,229 sq. ft. (441,369 sq. ft. + 386,460 sq. ft.) of new retail space.

When factoring future growth against the current 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.

As the City continues to grow and expand its market area penetration, the progression of retail will correspondingly create opportunities for retailers that may already have locations in areas like Emerald Hills, but for whom Fort Saskatchewan will now be seen as truly its own regional or quasi-regional retail market.

## 6.3 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 6.6 and Figure 6.1** illustrate the Retail Gap Analysis on a category-by-category basis for the City of Fort Saskatchewan.

Given the average rate of market shares (at 50%), it is not surprising that Fort Saskatchewan still exhibits a high degree of retail sales leakage (outflow) of spending dollars, particularly for bigger ticket items or DSTM type merchandise, namely fashion and home decor/furniture.

## 6.4 RETAIL INFLOW & OUTFLOW

Key Planning 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 as shown in **Figure 6.1 and Table 6.6**.



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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, meaning the City of Fort Saskatchewan.

Inflow (also referred to as Surplus) represents a condition whereby the supply exceeds the areas demand and where retailers are attracting shoppers that reside outside the City.

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

**Table 6.6** reveals a pattern of spending that again clearly substantiates the idea that the City of Fort Saskatchewan is evolving into a self-serving regional Retail Trade Area whereby the City has done a good job of curbing outflow for convenience and day-to-day necessities, but still exhibits patterns of outflow on DSTM type merchandise. The evolved and growing Primary Trade Area will help to stem this tide and create a framework for attracting the necessary retailers to retaining more spending in the City.

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 6.6 and Figure 6.1** 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 (made more accessible by the Anthony Henday highway), which brings into play a wide array of projects that even includes South Edmonton Common and West Edmonton Mall.

The comparison of supply to demand comparing the City's inventory to total spending shows a relatively balanced market. This however doesn't take into account the larger regional draw that Fort Saskatchewan has become over the past 5+ years.

Cross-referencing the City's retail spending against the actual retail sales estimated for its current inventory yields an estimated total net sales outflow of $37 million dollars, which means the City must provide the necessary retail that corresponds with its growth locally and regionally as a growing retail and service hub.

The results of the inflow/outflow analysis show a clear pattern whereby bigger ticket purchases like Auto/RV, Home Furnishings and Fashion have the potential to be added to Fort Saskatchewan over the next decade particularly since those categories represent voids or gaps in the trade area where leakage is occurring.

Alternatively, categories like Food & Beverage benefit from strong inflow as do Sporting Goods, Home Improvement and Auto Parts. These all represent categories that are established yet could be opportunistic for the right tenants to tap into proven and established spending inflow.

TABLE 6.6

## RETAIL INFLOW / OUTFLOW ESTIMATES

| MERCHANDISE CATEGORY | INVENTORY SQ. FT. | CURRENT ANNUAL RETAIL SALES (SUPPLY) | 2018 CITY OF FORT SASKATCHEWAN RETAIL EXPENDITURE (DEMAND) | (OUTFLOW) INFLOW SALES | FLOORSPACE DEMAND SQ. FT. | FLOORSPACE DIFFERENTIAL SQ. FT. (supply minus demand) | OUTFLOW INFLOW FACTOR (based on sales vs spending demand) |
|---|---|---|---|---|---|---|---|
| GROCERY & SPECIALTY FOODS | 230,222 | 113,860,463 | $109,184,760 | $4,675,703 | 220,768 | 9,454 | 2.1 |
| ALCOHOL & TOBACCO | 39,722 | 15,327,666 | $18,159,390 | ($2,831,724) | 47,061 | (7,339) | (8.5) |
| PHARMACY | 61,159 | 38,432,198 | $8,954,064 | $29,478,134 | 14,249 | 46,910 | 62.2 |
| PERSONAL SERVICES | 50,802 | 8,525,055 | $17,679,708 | ($9,154,653) | 105,355 | (54,553) | (34.9) |
| CLOTHING & APPAREL | 79,891 | 25,597,932 | $28,621,026 | ($3,023,094) | 89,326 | (9,435) | (5.6) |
| FOOTWEAR | 2,500 | 825,000 | $9,787,797 | ($8,962,797) | 29,660 | (27,160) | (84.5) |
| JEWELRY & ACCESSORIES | 6,019 | 3,468,713 | $5,367,870 | ($1,899,158) | 9,314 | (3,295) | (21.5) |
| HEALTH & BEAUTY | 11,199 | 4,239,408 | $10,724,319 | ($6,484,911) | 28,330 | (17,131) | (43.3) |
| HOME ELECTRONICS & APPLIANCES | 20,744 | 10,089,934 | $15,486,876 | ($5,396,942) | 31,840 | (11,096) | (21.1) |
| HOME FURNISHINGS & ACCESSORIES | 33,507 | 10,159,806 | $54,775,116 | ($44,615,310) | 180,649 | (147,142) | (68.7) |
| HOME IMPROVEMENT & GARDENING | 131,567 | 43,169,201 | $16,366,293 | $26,802,908 | 49,880 | 81,687 | 45.0 |
| BOOKS & MULTI-MEDIA | 1,000 | 250,000 | $16,594,713 | ($16,344,713) | 66,379 | (65,379) | (97.0) |
| SPORTING GOODS & OUTDOOR RECREATION | 21,976 | 6,243,900 | $4,020,192 | $2,223,708 | 14,149 | 7,826 | 21.7 |
| TOYS & HOBBIES | 12,698 | 3,880,847 | $4,180,086 | ($299,239) | 13,677 | (979) | (3.7) |
| SPECIALTY RETAIL | 88,472 | 22,625,163 | $6,635,601 | $15,989,562 | 25,947 | 62,525 | 54.6 |
| FULL SERVICE F&B | 65,878 | 24,647,610 | $30,699,648 | ($6,052,038) | 82,053 | (16,176) | (10.9) |
| LIMITED SERVICE F&B | 68,610 | 37,580,833 | $5,048,082 | $32,532,751 | 9,216 | 59,394 | 76.3 |
| DRINKING ESTABLISHMENT | 15,691 | 8,669,225 | $2,843,829 | $5,825,396 | 5,147 | 10,544 | 50.6 |
| ARTS & ENTERTAINMENT | 23,210 | 6,527,841 | $12,997,098 | ($6,469,257) | 46,212 | (23,002) | (33.1) |
| FITNESS & LEISURE | 46,300 | 10,297,500 | $5,836,131 | $4,461,369 | 26,241 | 20,059 | 27.7 |
| AUTO PARTS & ACCESSORIES | 60,243 | 24,747,281 | $8,154,594 | $16,592,687 | 19,851 | 40,392 | 50.4 |
| AUTO/RV/MOTORSPORTS DEALERSHIP | 60,764 | 29,777,237 | $97,204,131 | ($67,426,894) | 198,358 | (137,594) | (53.1) |
| VACANT | 101,627 | | | | | | |
| VACANT NEW | 61,487 | | | | | | |
| **TOTAL** | **1,295,288** | **$448,942,811** | **$489,321,324** | **-$40,378,513** | **1,313,662** | **-18,374** | **(4.3)** |

*** Grocery & Specialty Foods Includes Convenience Stores



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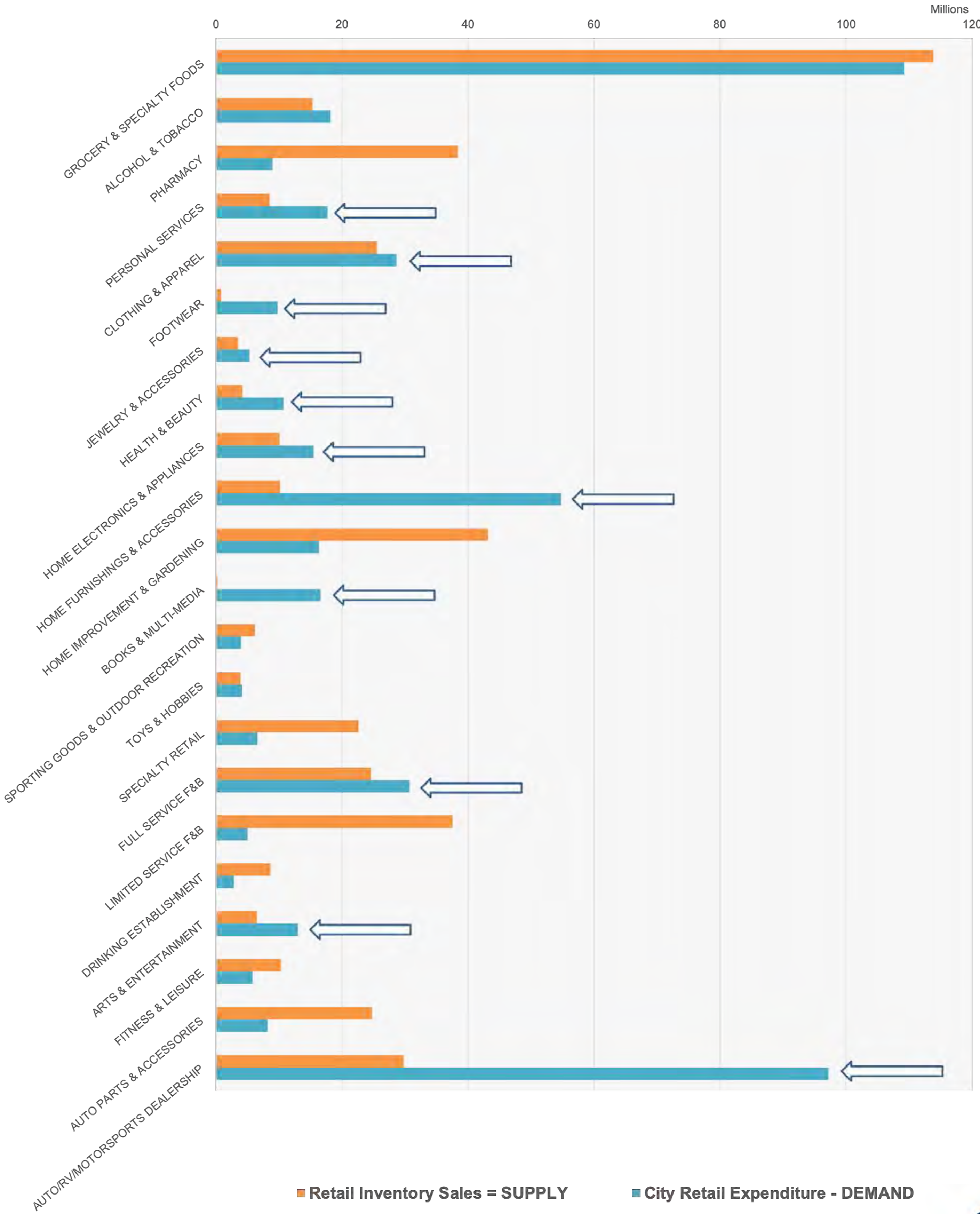
FIGURE 6.1

## CITY OF FORT SASKATCHEWAN RETAIL SPENDING SUPPLY AND DEMAND



# 7 downtown profile & analysis

7.1
## INTRODUCTION

Key Planning and Colliers International Consulting conducted a comprehensive inventory of Downtown Fort Saskatchewan's retail supply in the Spring of 2019 as part of the City's Economic Development Strategy.

In any community, the success can most be observed by the fabric of the Downtown core. Downtown is the one neighbourhood that is shared by the community. Cafés, restaurants, shops, activities, events and festivals, make downtown a destination for celebrating and socializing outside of a home or workplace.

Retail is often referred to as the "face of the place" and a successful downtown can often become the true identity of a community.

In 2009, the City undertook Downtown Area Redevelopment Plan in 2009 and most recently the City's Economic Development Department began developing an Economic Development Strategy specifically for the City's downtown. The intent of the original ARP was stated as follows:

***To provide direction to ensure that Downtown Fort Saskatchewan is the vibrant heart of the community - the location of choice for business and people, that provides a unique range of residential, commercial, entertainment, cultural, and recreational opportunities, a place where people choose to live, work, and play.***

This intent remains true today, although as the City has continued to grow and provide the services and shops that local and regional residents have sought, the Downtown's fragility as a core shopping, working or leisure destination has been challenged.

This profile analysis therefore provides a detailed inventory snapshot as well as a supplemental consumer survey to identify where the strengths of the Downtown lie, but also where the weaknesses and limitations exist.

7.2
## BUSINESS & PROPERTY OWNER CONSULTATION (2017)

In 2017, the City engaged Downey Norris & Associates to conduct a Downtown Business & Property Owner Consultation to identify issues and actions for creating a vibrant downtown.

The study noted that almost 40 percent of respondents indicated they own a business and property, while nearly 60 percent indicated they own a business only. One respondent was a property owner only. Nearly 40 percent of respondents have owned a business/property in downtown for more than 10 years. Some key findings included the following:

1. The majority of respondents (60%) have owned/operated a business in downtown for less than 10 years.
2. The availability of space and convenience of location are top reasons for choosing downtown.
3. If making the decision again today, almost half (19) indicated they would not or were unsure they would choose to locate downtown.
4. Twenty-five percent of respondents feel lease rates for property downtown are generally lower than for business property in other locations in Fort Saskatchewan.
5. 48% of respondents indicated it is important that downtown be open for business evenings and weekends.

6. 21% of respondents with retail business who are not open evenings and weekends indicate there is not enough foot traffic to justify the cost of having extended hours.
7. 51% of respondents do not agree that City has a clear, compelling vision for the future of downtown (28% agree, 21% don't know).
8. Majority of respondents (70%) are supportive of the City's efforts to develop downtown.

As a result of the survey, the following actions were identified by the respondents as being important to the success or reinvigoration of the Downtown:

1. Attract more retail businesses & shopping – 72%
2. Attract unique boutique retail outlets – 62%
3. Recognize and differentiate the needs of small family owned business versus large businesses and corporations – 56%
4. Increase the number of people living downtown – 54%
5. Add more parking – 52%

## 7.3 DOWNTOWN INVENTORY

As documented in the following bar charts as well as **Figure 7.1** and based on in depth analysis and fieldwork, we have broken up the downtown area into four sub-areas; Downtown Core, Downtown West, Midtown, and Uptown. Each of these areas differ in terms of their retail mix and performance metrics. Within Downtown West, the true focal point of retail and centre piece of the Downtown was identified at the corner of 100 Avenue and 103 Street.

**DOWNTOWN CORE**

Total GLA: 167,246 sf

Vacancy: 12.1%

Local Stores: 85%

Branded Stores: 15%

Although the Downtown Core is envisioned as the heart of the City, it currently suffers from the highest vacancy rate at 12.1% with a high amount of tenant turnover and troublesome vacancies near the focal point intersection and along both 100 Avenue and 103 Street.

The majority of tenants within downtown offer Professional Services (35.6%), followed by Specialty Retail (8.1%), Personal Services (7.1%), and Full-Service Restaurants (6.7%). There is a notable lack of Limited Service Restaurants (0.8%) which are crucial for facilitating social gathering spots and an active downtown environment.

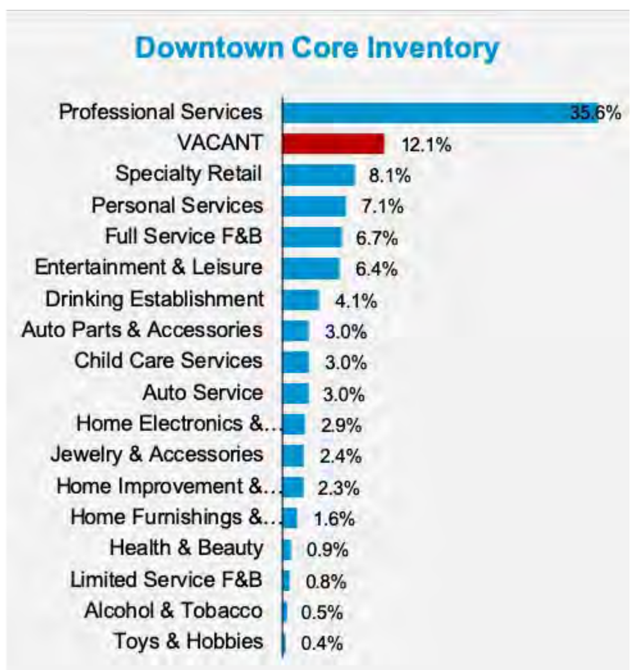
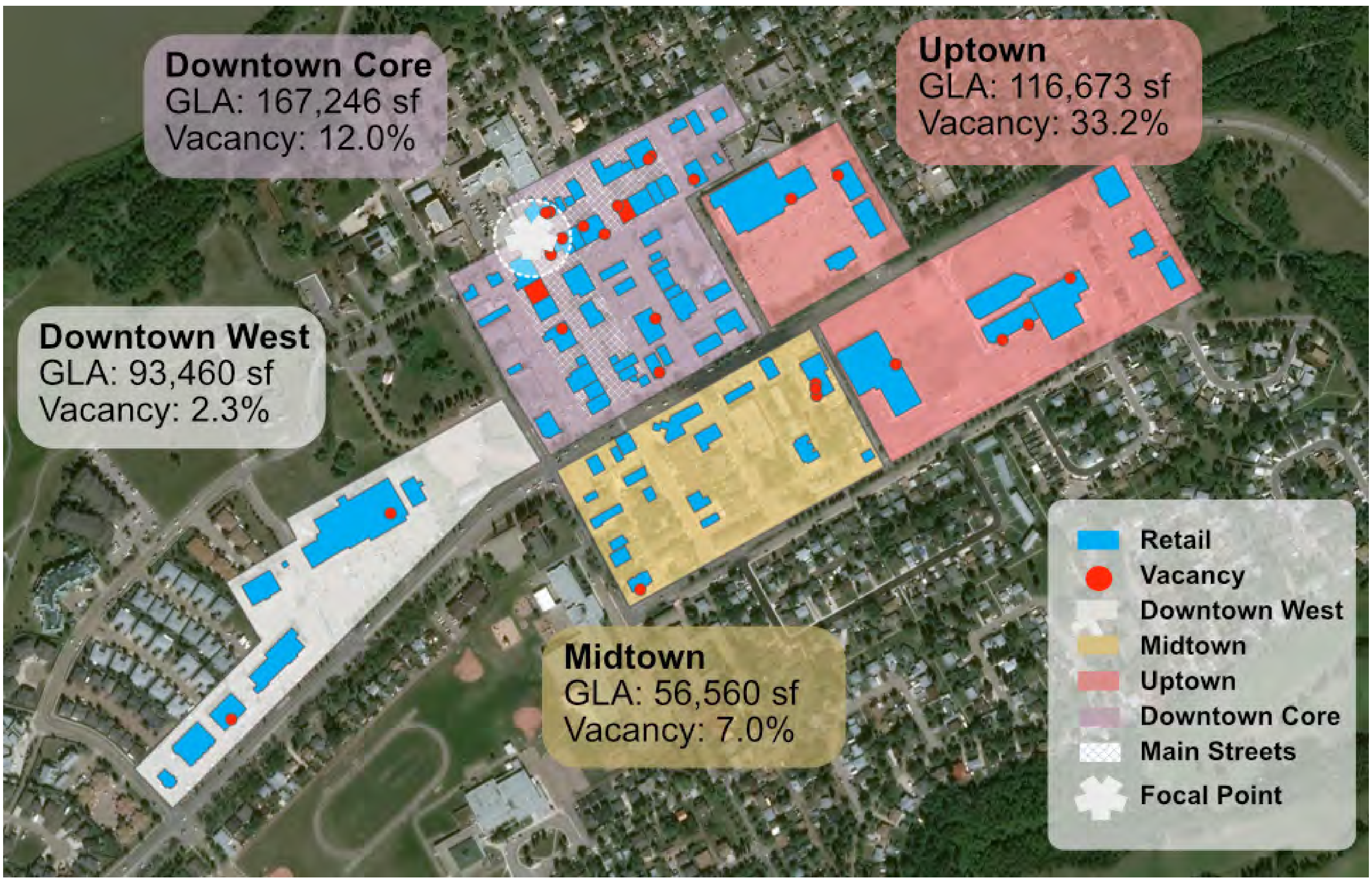


FIGURE 7.1

## FORT SASKATCHEWAN DOWNTOWN RETAIL NODES SUMMARY



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**DOWNTOWN WEST**

Total GLA: 93,460 sf

Vacancy: 2.3%

Local Stores: 50%

Branded Stores: 50%

Downtown West is perhaps the healthiest sub-area, with a vacancy rate of only 2.3%. This is the lowest among all Downtown sub-areas.

Due to the Co-op grocery store and theatre, the largest floorspace occupants are Grocery & Specialty Foods (43.3%) and Entertainment and Leisure (19.2%). Downtown West also has a healthy amount of Professional Services (17.4%).


**MIDTOWN**

Total GLA: 56,560 sf

Vacancy: 7.0%

Local Stores: 84%

Branded Stores: 16%

Midtown consists primarily of locally serving Personal and Professional Services, accounting for a total of 29.4% and 23.7% of total floorspace, respectively.

Approximately 84% of the stores within Midtown are locally owned and operated, whereas 16% are national chains entirely located along 99 Avenue.

Despite a relatively healthy vacancy rate of 7.0%, the retail offering within Midtown is relatively poor quality and unlikely to attract significant regional footfall.

**UPTOWN**

Total GLA: 116,673 sf

Vacancy: 33.2%

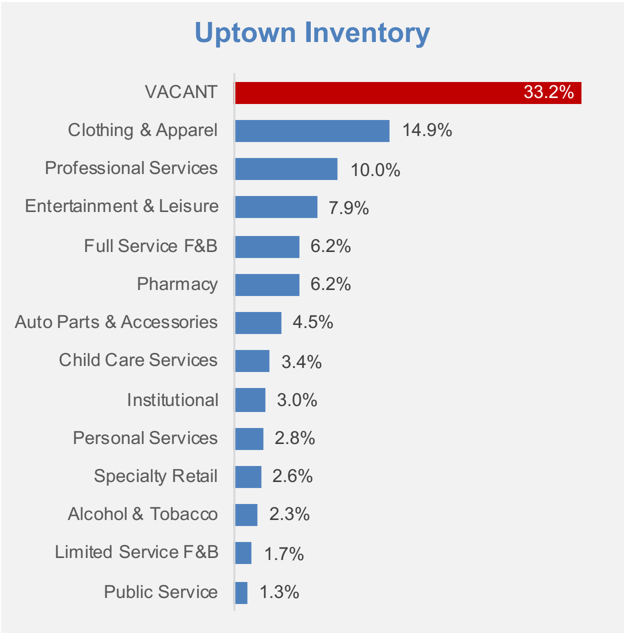
Local Stores: 62%

Branded Stores: 38%

Uptown consists of Fort Station and Market Square, with a vacancy rate of 33.2% and the strongest concentration of national stores at 38%.

Clothing and Apparel take up the largest amount of floorspace (14.9%), followed by Professional Services (10.0%), Entertainment and Leisure (7.9%), and Full-Service Food and Beverage (6.2%).

This auto-oriented area of Downtown is the most underutilized based on its future potential for infill development and a dynamic pedestrian-oriented retail environment that could be supported by increased residential density.




## 7.4 CONSUMER SURVEY RESULTS

In conjunction with the Business and Property Owner survey conducted in 2017 for the Downtown, Key Planning and Colliers in collaboration with Keyfax Market Research undertook an in-person survey of consumers in the Downtown at multiple locations over multiple days and at various times of the day. Additionally, the project team held one-on-one casual conversations with identified stakeholders to get their opinions and views on what makes the Downtown tick or could be improved. The full responses are provided in the appendix to this report

As part of the consumer survey, respondents were asked numerous questions regarding their Downtown shopping habits. Overall, only 15% of respondents indicated that they visit Downtown daily, 29.5% visit weekly, 38.5% visit monthly,12.0% visit yearly, and 5.0% never enter Downtown. For respondents that indicated they visit yearly or less, 64.7% said it was because there was nothing that they need Downtown that they can't get elsewhere in the City.

Consumers that do venture into Downtown generally don't spend much time before leaving as 36.5% of respondents spend less than an hour and 48.5% spend between 1-2 hours. The primary reason that residents do go Downtown is for shopping (32.3%) and services (26.8%). For comparison shopping purposes, only 7% of respondents indicated that Downtown would be their primary destination, with shopping patterns depending on the desire to shop at a specific store (22.8%), a strong selection of stores (21.3%), prices (21.3%), and proximity to home (17.3%). When it comes to convenience shopping needs, only 15% of respondents travel Downtown.

# CITY OF FORT SASKATCHEWAN: DOWNTOWN CONSUMER INTERCEPT SURVEY - 2019

Survey results indicate that 15.0% of residents surveyed identify the Downtown as their primary Convenience Shopping Area, while 7.0% identify Downtown as their primary Comparison Shopping destination

## purpose of visit

Purpose of visits to downtown by those that visit on a monthly basis or more

Shopping 32.3%

Services 26.8%

Entertainment / Dining 19.7%

Walk / Browse 5.1%

Work 4.5%

## downtown visits

**83.0%**

Visit downtown on a monthly basis or more

Daily 15.0%

Weekly 29.5%

Monthly 38.5 %

Yearly 12.0 %

Never 5.0%

## duration of downtown visit

**85.0%**

Visit downtown for 2 hours or less

<1hr 36.5%

1hr - 2hr 48.5%

2hr - 3hr 10.5%

>3 hr 4.5%

Thriving downtown cores in cities with a similar trade area population to Fort Saskatchewan rely on a much stronger concentration of daily footfall and longer visits. Currently, Downtown Fort Saskatchewan suffers from a lack of variety and quality in its retail offerings to encourage consumers to visit rather than driving to the more convenient and accessible shopping nodes such as Cornerstone.

Additionally, once Downtown, there is a notable lack of retailers that encourage people to spend time and socialize such as coffee shops and quick service restaurants. When implemented correctly with high quality design, consistent store hours, and active storefronts with outdoor seating areas, these tenant types can be instrumental in generating streetfront activity and facilitating an engaging and attractive retail environment.

## 7.5 STAKEHOLDER INTERVIEWS

As part of the Downtown analysis, the project team interviewed a collection of business stakeholders comprising retail, office, professional and personal service sector, and administrative organizations. The list of individuals with whom one-on-one conversations were had included:

Fort Lanes Bowling: Jonathan Jacobs - Owner
Washland - Wayne Land  Owner
The Blue Poppie - Tina Prins - Owner
MOD Kitchen - Ken Bergmann, Owner
Tirecraft - Darcey Cannon, Owner
Chamber of Commerce - Tamara Dabels - Executive Director
Kjenner Financial - Randy Kjenner - Owner
The Brandt Hotel - Kam Choufi - Owner
Pinder Chiropractic- Kevin Pinder - Owner

Each of these interviews is summarized in Appendix C, but the key findings and common threads coming from the respondents, in not particular order of importance comprise the following:

1. Downtown Diner closure has had an impact along with high restaurant turnover in general.
2. Vacant lots need to be dealt with either as a strategy or penalty to stimulate activation of the space.
3. Downtown needs a coffee shop/cafe.
4. Markets and events must be consistently programmed year-round, even in winter.
5. The Downtown is in need of a functional and affordable Business Improvement Association.
6. For most Downtown businesses, 75% of their customer base is from Fort Saskatchewan.
7. The Facade Program was effective, but overall store frontages and poor signage remain an issue.
8. Downtown needs a social gathering spot that is central to the core of the Downtown itself.
9. Rental rates are considered too high and need to be examined for creative or alternative structures.
10. Retail store hours are inconsistent and need to be reviewed.

While the City can play a role in many of the above issues, the key to true success will be having a strong BIA established in which the business community can and should be the champion for the implementation of programs and strategies as assisted by City where possible.

## 7.6 SUMMARY & IMPLICATIONS

- It is essential to encourage the introduction of a few social gathering spots within Downtown. Currently people come to downtown for one reason and then leave. The introduction of a coffee shop, pub, or both, with a large patio and pleasant décor will go a long way in enhancing the overall retail activity within downtown with spinoff benefits for nearby retailers.
- Although the street festival was a good idea, it struggled due to the weather issues and a lack of participation from local retailers. This festival should continue moving forward with retailers encouraged to participate and made aware of the significant benefits that they may receive if they remain open during the festivities. The Easter Egg Crawl, Halloween Handy, and Canada Parade are all also helpful in attracting footfall from the surrounding area. It is recommended to plan numerous additional Downtown events throughout the year such as a winter festival with an outdoor skating rink.
- Downtown currently suffers from persistent vacant units and lots. The introduction of policies such as increased tax rates or fines for units and lots remaining vacant for too long may be helpful.
- Nearly all of the storefronts throughout Downtown are dated and inactive without any patio space. Part of the reason behind this is due to the permitting process to allow outdoor seating areas, and the lack of awareness of available grants such as the building façade program. Active, transparent storefronts are essential in facilitating a vibrant retail experience.
- Create a marketing theme for Downtown Fort Saskatchewan such as the "Historical Fort District", along with attractive signage along the highway with a directory of unique local businesses that may help encourage potential consumers to explore what downtown has to offer.
- Encourage residential infill and multi-family development in the downtown area which could help to increase population growth within Downtown while also attracting a younger, more pedestrian-oriented demographic that would be more prone to spend money at local restaurants, cafés, retailers, and services.

# 8 consumer intercept survey

8.1
## 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. This survey provides an update and thus will highlight changes in consumer patterns and behaviour between 2014 and 2019 .

Respondents were interviewed at strategic locations (Dow Centennial Centre, Cornerstone Centre, and Downtown) 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**.

8.2
## 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 8.1** illustrates the breakdown of Respondent residences for the Consumer Intercept Survey, revealing 72.5% of respondents currently live in the City of Fort Saskatchewan, with a further dispersed representation from surrounding counties and towns. The overall pattern of consumers is similar to 2014, although there is a noticed increase in representation from Strathcona County (3% in 2014 to 7.5% in 2019).

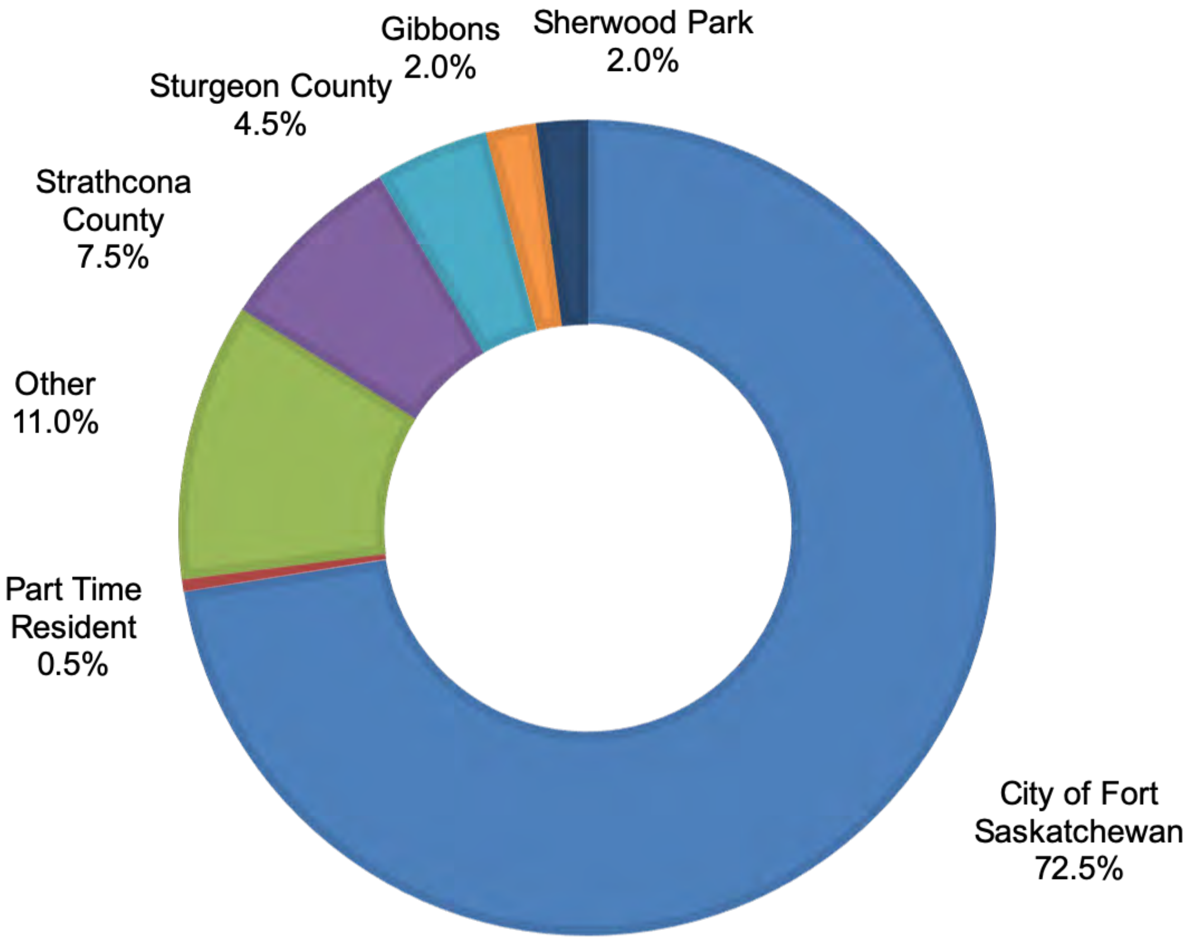
Furthermore, **Figure 8.2** illustrates a postal code "heat map" that shows density from which Survey Respondents originated using the 6 digit postal codes as provided by the respondents.

**Figure 8.2** clearly illustrates a relatively 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 north, northeast and east, with less dependence on populations to the south.

**Figures 8.3 and 8.4** 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 and 55-64 year old age cohort. Furthermore, 27% of the respondents have a household income of greater than $125,000 and just under 47% of respondents were above $100,000.

FIGURE 8.1

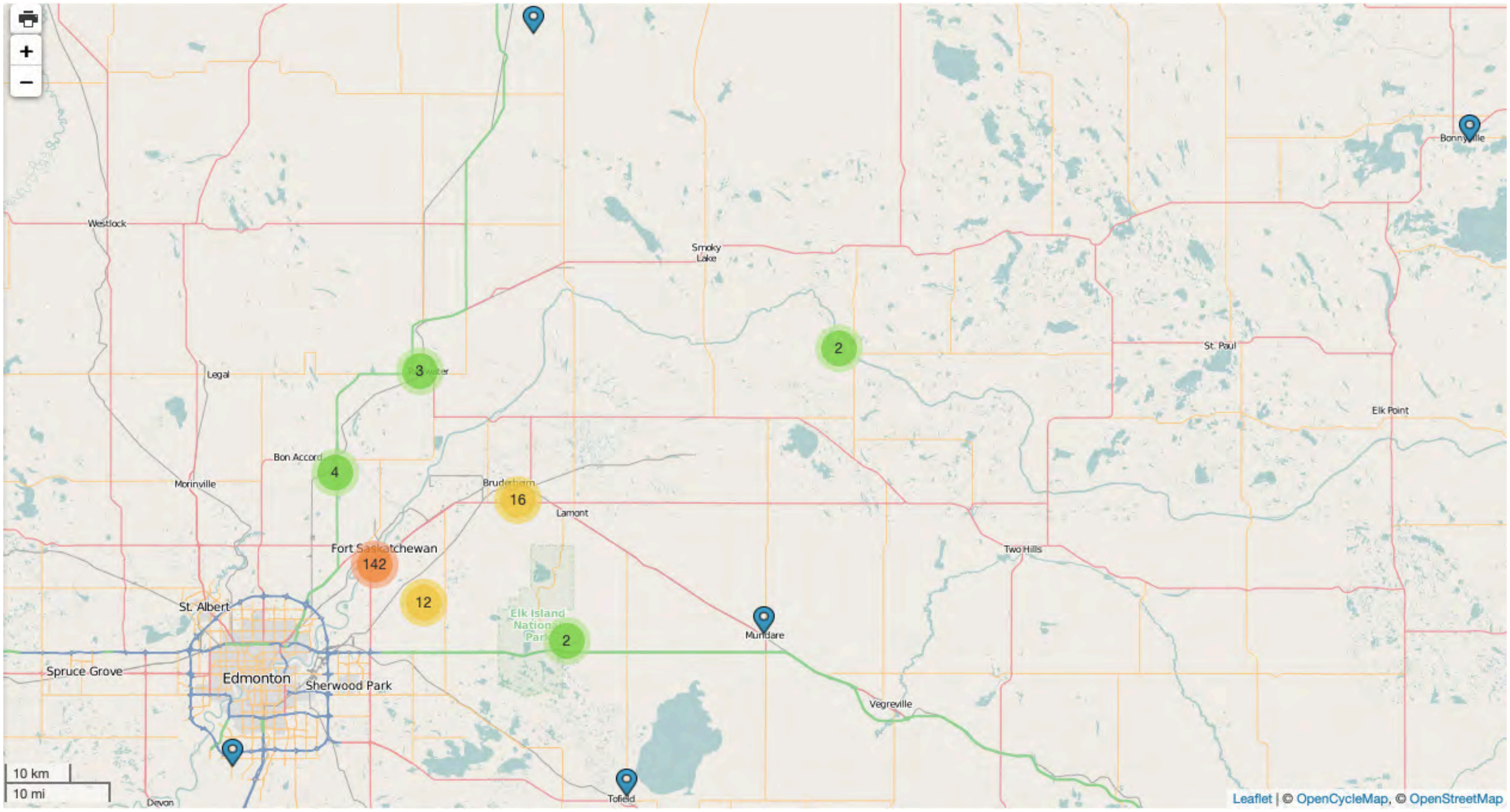
## CONSUMER SURVEY RESPONDENT BY ORIGIN (2019)




| Survey Respondent Residence | 2014 | 2014 (%) | 2019 | 2019 (%) |
|---|---|---|---|---|
| | | | | |
| City of Fort Saskatchewan | 125 | 62.5% | 145 | 72.5% |
| Part Time Resident | 30 | 15.0% | 1 | 0.5% |
| Other | 28 | 14.0% | 22 | 11.0% |
| Strathcona County | 6 | 3.0% | 15 | 7.5% |
| Sturgeon County | 5 | 2.5% | 9 | 4.5% |
| Gibbons | 3 | 1.5% | 4 | 2.0% |
| Sherwood Park | 3 | 1.5% | 4 | 2.0% |
| **TOTAL** | **200** | **100%** | **200** | **100%** |

FIGURE 8.2

## CONSUMER SURVEY RESPONDENT BY POSTAL CODE (BY 6-DIGIT POSTAL CODE)



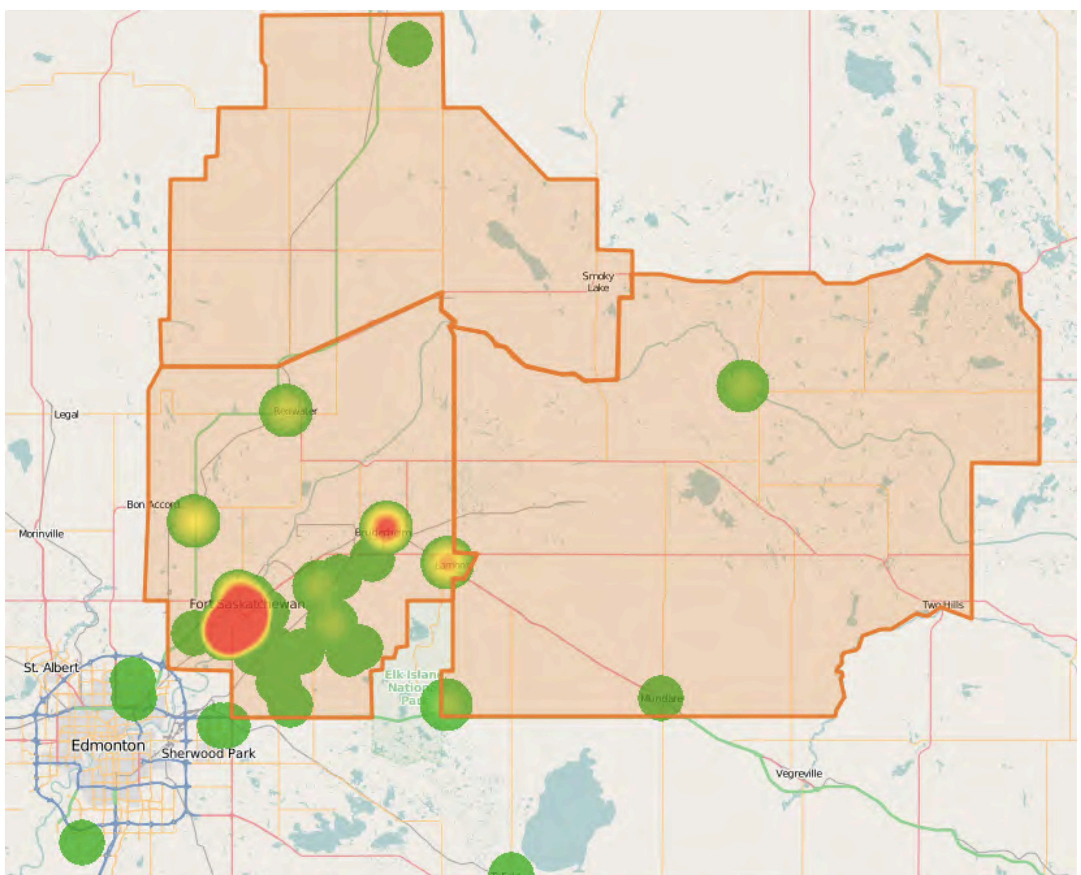






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FIGURE 8.3

## CONSUMER SURVEY AGE PROFILE ALL RESPONDENTS

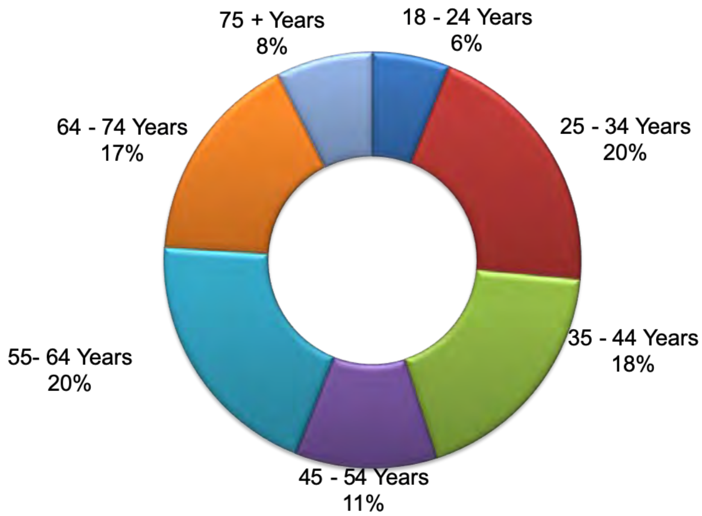
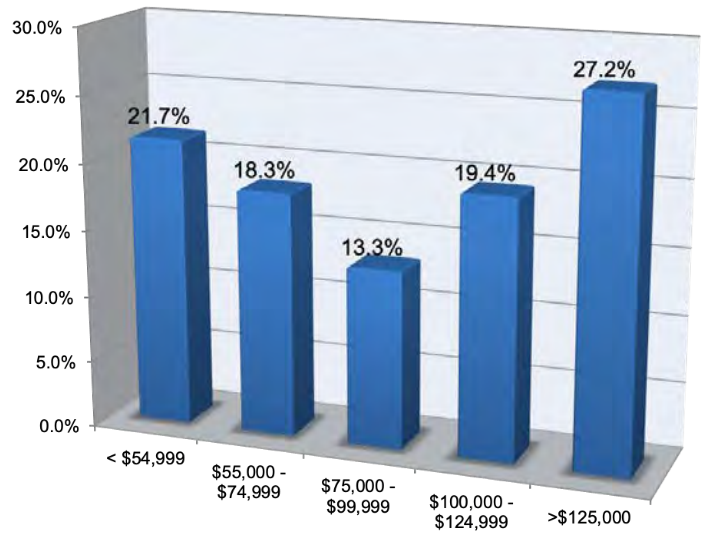



FIGURE 8.4

## CONSUMER SURVEY INCOME PROFILE ALL RESPONDENTS




8.3

## PREFERRED SHOPPING LOCATIONS

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

- 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 stores/services would increase your visits/spending in Fort Saskatchewan?

**Figures 8.5 to 8.10** 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 8.5 & 8.6** indicate that Cornerstone and Safeway continues to be 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. The survey also revealed an increase in the selection of products since 2014, which is a reflection of the continued new retail entrants in the market, mostly at the Southpointe/Cornerstone node.

However, since 2014 and in large part because of the opening of a new Freson Bros., the Westpark area has now become a new location.

Not to be outdone, the Downtown seems to have had a resurgence of customer patronage since 2014 with an increase of 9% of respondents saying that Downtown was there primary convenience shopping centre, which is driven in large part to the COOP and to a lesser degree the Giant Tiger.

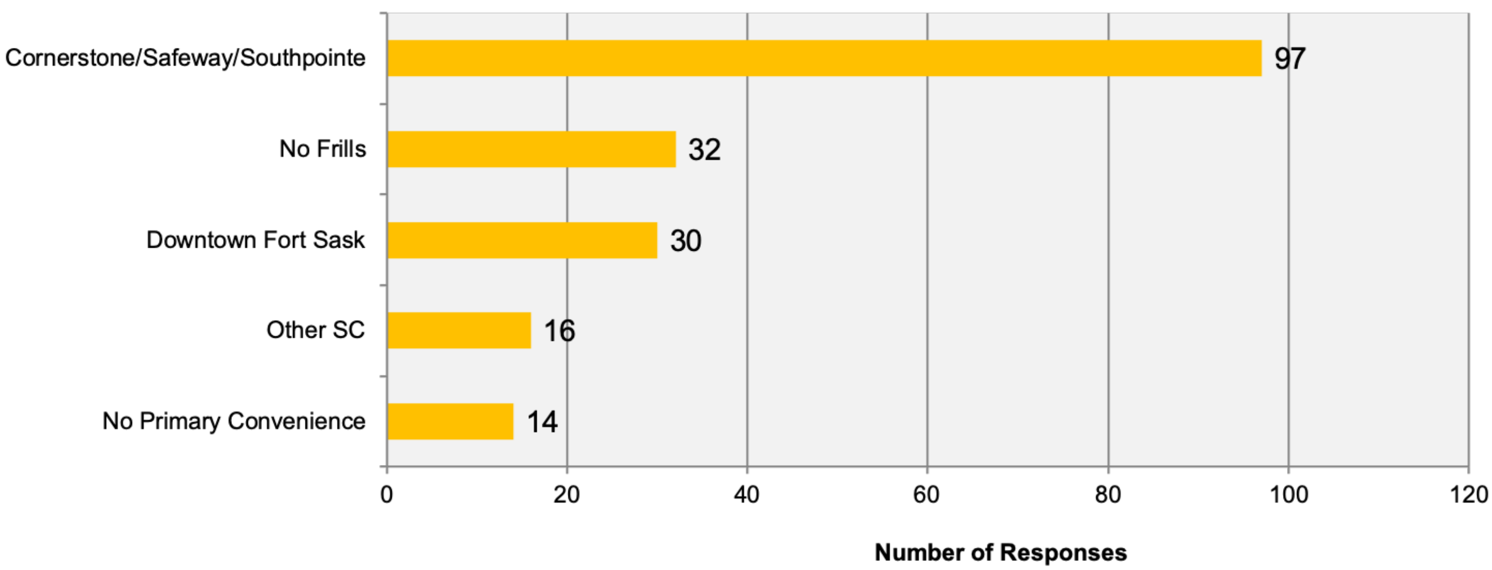
From a convenience perspective Costco, on the other hand still did not resonate as highly as expected, although it is singled out as a desired retailer by respondents. This would seem to represent a disconnect in consumers' needs vs. wants or more a factor that Costco is not located close enough to the current consumer base.

If Costco were to locate in the region (which is

FIGURE 8.5

## WHAT IS YOUR PRIMARY SHOPPING CENTRE FOR CONVENIENCE GOODS?

| **Q1A: Primay Convenience SC** | **2014** | | **2019** | |
|---|---|---|---|---|
| Cornerstone/Safeway/Southpointe | 129 | 65% | 97 | 49% |
| No Frills | 28 | 14% | 32 | 16% |
| Downtown Fort Sask | 12 | 6% | 30 | 15% |
| Other SC | 28 | 14% | 16 | 8% |
| No Primary Convenience | 1 | 1% | 14 | 7% |
| Westpark Southfort | | 0% | 9 | 5% |
| Costco NE Edmonton | 2 | 1% | 2 | 1% |
| **Total** | **200** | | **200** | |



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most likely a minimum of 5 to 10 years out), the survey results would likely change notably.

*Primary Comparison Shopping Centre*

**Figures 8.7 and 8.8** 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 which garnered 43 responses in 2014 now only garnered 7 responses suggesting that this once well-used retail node has given way to Emerald Hills, which had the second highest response rate at 36 responses in 2019 compared to only 3 in 2014. Also, though it seems that consumers are ever-mobile and prepared to shop at multiple locations as evidenced by a higher response in 2019 for no primary comparison location.

In terms of the reasons for shopping at an identified Comparison shopping location, prices are a common response, though most respondents note that they are seeking out a specific store or category which is not available in Fort Saskatchewan.

There has been a slight decline in the desire to shop at local stores, which is in direct correlation to the addition of new brands in the market and a stagnation of entrepreneurial activity in the Downtown coming out of an economic downturn.

The retail inflow and outflow identified previously does illustrate that consumers have a willingness to visit retail nodes outside of Fort Saskatchewan for both 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. The City's established and growing trade region is becoming strong enough to support new specifically targeted entrants. The motto for Fort Saskatchewan must be quality over quantity and not at the expense of the Downtown.

Given the price consciousness of respondents, Fort Saskatchewan could target price points and broader market appeal tenants. Tenants such as Real Canadian Superstore, Winners, Home Sense, Old Navy, Value Village or JYSK could be well-served by the opportunity, even if they may have a location in Northeast Edmonton.

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.

## 8.4 LIKES & DESIRES IN FORT SASKATCHEWAN

**Figures 8.9 and 8.10** highlight the "likes" and "desires" of the respondents as it relates to the current and future shopping opportunities in Fort Saskatchewan.

FIGURE 8.6

## WHAT IS YOUR REASON FOR CHOOSING THIS LOCATION?

| Q1B: Reasons for Primary Convenience SC | 2014 | | 2019 | |
|---|---|---|---|---|
| Prices | 83 | 19% | 82 | 21% |
| Close to home | 59 | 14% | 50 | 13% |
| Sales promotions | 24 | 5% | 32 | 8% |
| Shop specific store | 1 | 0% | 31 | 8% |
| Quality of products | 38 | 9% | 30 | 8% |
| Selection of products | 18 | 4% | 30 | 8% |
| One stop shop | 39 | 9% | 24 | 6% |
| Familiarity | 41 | 9% | 22 | 6% |
| Specfic brand item | 34 | 8% | 16 | 4% |
| Customer Service | 14 | 3% | 16 | 4% |
| Easy access | 14 | 3% | 15 | 4% |
| Support local | 12 | 3% | 8 | 2% |
| Buy in bulk | 5 | 1% | 7 | 2% |
| Meets needs | 10 | 2% | 6 | 2% |
| Close to work/hotel | 21 | 5% | 5 | 1% |
| Not crowded | 3 | 1% | 4 | 1% |
| In the area | 3 | 1% | 4 | 1% |
| Parking | 1 | 0% | 4 | 1% |
| Proximity to other areas | 4 | 1% | 3 | 1% |
| Selection of stores | 2 | 0% | 3 | 1% |
| Quality of stores | 1 | 0% | 3 | 1% |
| No Taxes | | 0% | 1 | 0% |
| Convenience items | 7 | 2% | | 0% |
| Hours of operation | 3 | 1% | | 0% |
| **Total** | **437** | | **396** | |

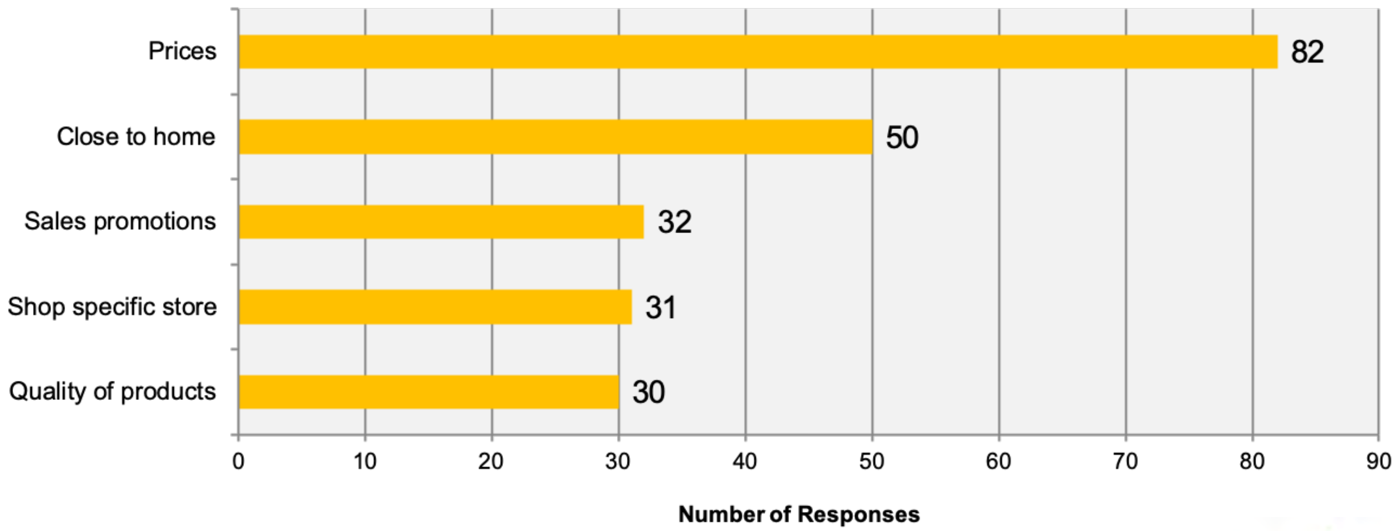

FIGURE 8.7

## WHAT IS YOUR PRIMARY SHOPPING CENTRE FOR COMPARISON GOODS?

| Q2A: Primary Comparison SC | 2014 | | 2019 | |
|---|---|---|---|---|
| Cornerstone Centre | 72 | 36% | 58 | 29% |
| Other SC | 68 | 34% | 49 | 25% |
| Emerald Hills | 3 | 2% | 36 | 18% |
| No primary comparison | 10 | 5% | 27 | 14% |
| Downtown Fort Sask | 2 | 1% | 14 | 7% |
| Sherwood Park Mall | 43 | 22% | 7 | 4% |
| Southpoint | | 0% | 7 | 4% |
| Costco NE Edmonton | 2 | 1% | 1 | 1% |
| Westpark Southfort | | 0% | 1 | 1% |
| **Total** | **200** | | **200** | |

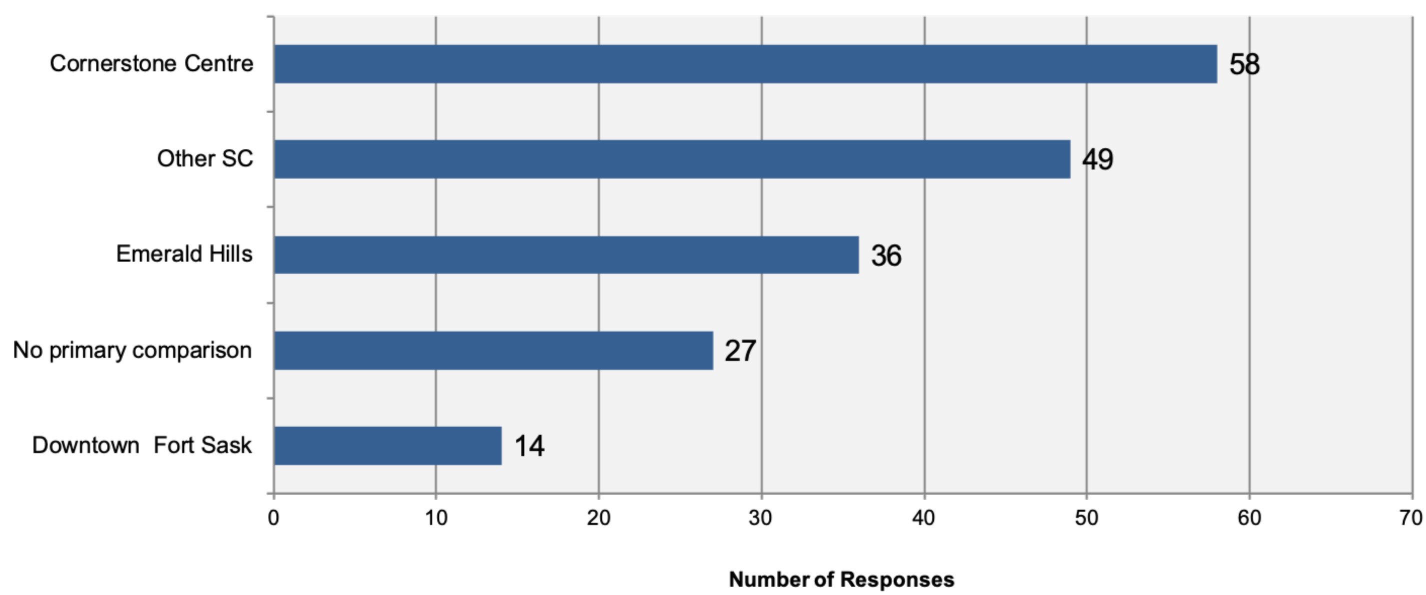

FIGURE 8.8

## WHAT IS YOUR REASON FOR CHOOSING THIS LOCATION?

| Q2B: Reasons for Primary Comparison SC | 2014 | | 2019 | |
|---|---|---|---|---|
| Shop specific store | 28 | 7% | 45 | 12% |
| Selection of stores | 78 | 18% | 42 | 11% |
| Prices | 57 | 13% | 42 | 11% |
| Close to home | 33 | 8% | 34 | 9% |
| Clothing | 28 | 7% | 30 | 8% |
| Selection of products | 29 | 7% | 29 | 7% |
| One stop shop | 44 | 10% | 25 | 6% |
| Meets neets | 18 | 4% | 25 | 6% |
| Specific brand item | 13 | 3% | 20 | 5% |
| Sales promotions | 9 | 2% | 15 | 4% |
| Easy access | 9 | 2% | 14 | 4% |
| Quality of products | 8 | 2% | 12 | 3% |
| Customer service | 7 | 2% | 10 | 3% |
| In the area | 5 | 1% | 10 | 3% |
| Close to work or hotel | 11 | 3% | 9 | 2% |
| Familiarity | 10 | 2% | 8 | 2% |
| Buy in Bulk | | 0% | 5 | 1% |
| Proximity to other areas | 2 | 0% | 4 | 1% |
| Support local | 10 | 2% | 3 | 1% |
| Quality of stores | 7 | 2% | 2 | 1% |
| Parking | 5 | 1% | 2 | 1% |
| Not crowded | 4 | 1% | 2 | 1% |
| Shoes | 3 | 1% | 1 | 0% |
| Comparison items | 1 | 0% | 1 | 0% |
| Department stores | 4 | 1% | | 0% |
| Day out / window shop | 2 | 0% | | 0% |
| No specific reason | 1 | 0% | | 0% |
| **Total** | **426** | | **390** | |

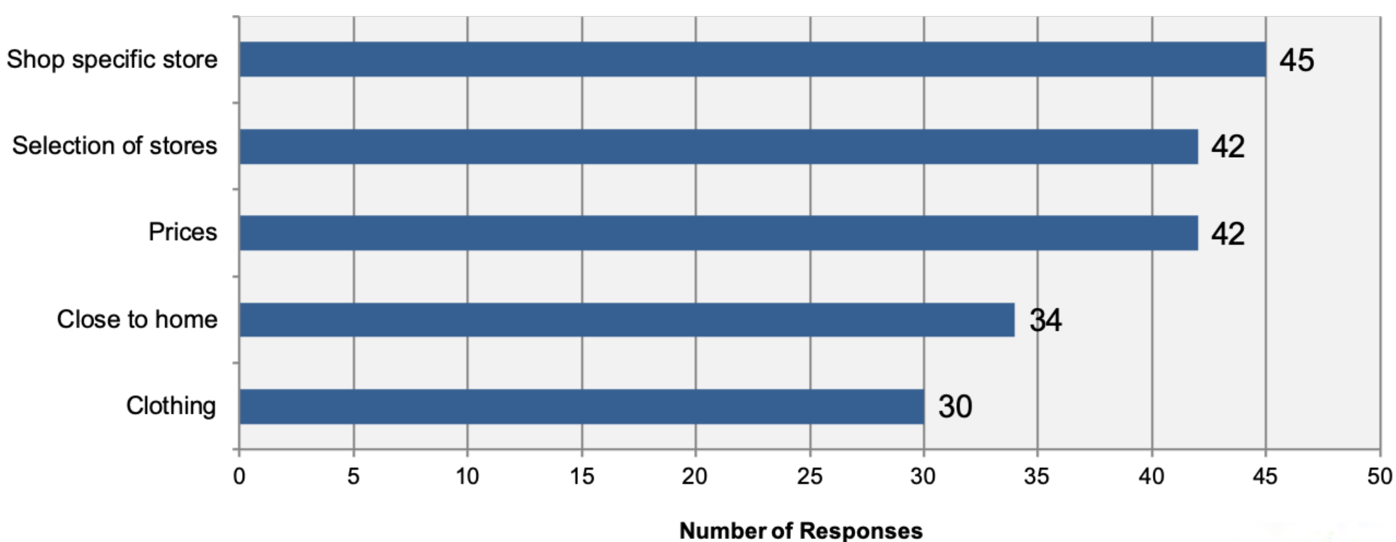




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FIGURE 8.9

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

| Q24: Like most about shopping opportunities in Fort Saskatchewan | 2014 | | 2019 | |
|---|---|---|---|---|
| Close to home | 68 | 15% | 63 | 17% |
| Meets needs | 74 | 17% | 56 | 15% |
| Like specific store | 14 | 3% | 34 | 9% |
| Selection of stores | 1 | 0% | 30 | 8% |
| Easy access | 38 | 9% | 24 | 7% |
| Support local | 41 | 9% | 20 | 5% |
| Nothing specific | 2 | 0% | 20 | 5% |
| Customer service | 31 | 7% | 15 | 4% |
| Prices and sales promotions | 9 | 2% | 14 | 4% |
| Small Town | | 0% | 14 | 4% |
| Proximity to other areas | 23 | 5% | 13 | 4% |
| Parking / traffic | 12 | 3% | 12 | 3% |
| Downtown Fort Sask | 40 | 9% | 10 | 3% |
| Not crowded | 9 | 2% | 7 | 2% |
| Quality of stores | 2 | 0% | 6 | 2% |
| Professional Services | | 0% | 5 | 1% |
| Farmer's Market | | 0% | 5 | 1% |
| One stop shop | 19 | 4% | 4 | 1% |
| Selection of restaurants | 2 | 0% | 4 | 1% |
| Familiarity | 8 | 2% | 3 | 1% |
| Activities & Attractions | 15 | 3% | 2 | 1% |
| Green Space | 6 | 1% | 2 | 1% |
| Like new stores | | 0% | 2 | 1% |
| Entertainment | | 0% | 2 | 1% |
| In stock | 1 | 0% | 1 | 0% |
| Close to work or hotel | 18 | 4% | | 0% |
| Selection of products | 4 | 1% | | 0% |
| Hours of operation | 3 | 1% | | 0% |
| **Total** | **440** | | **368** | |

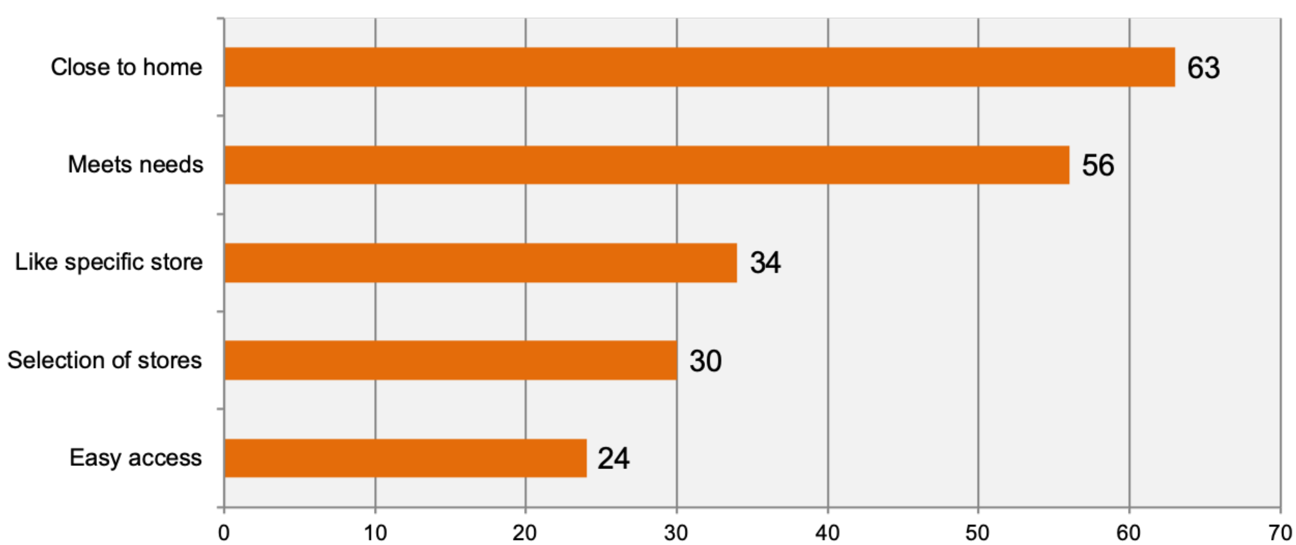
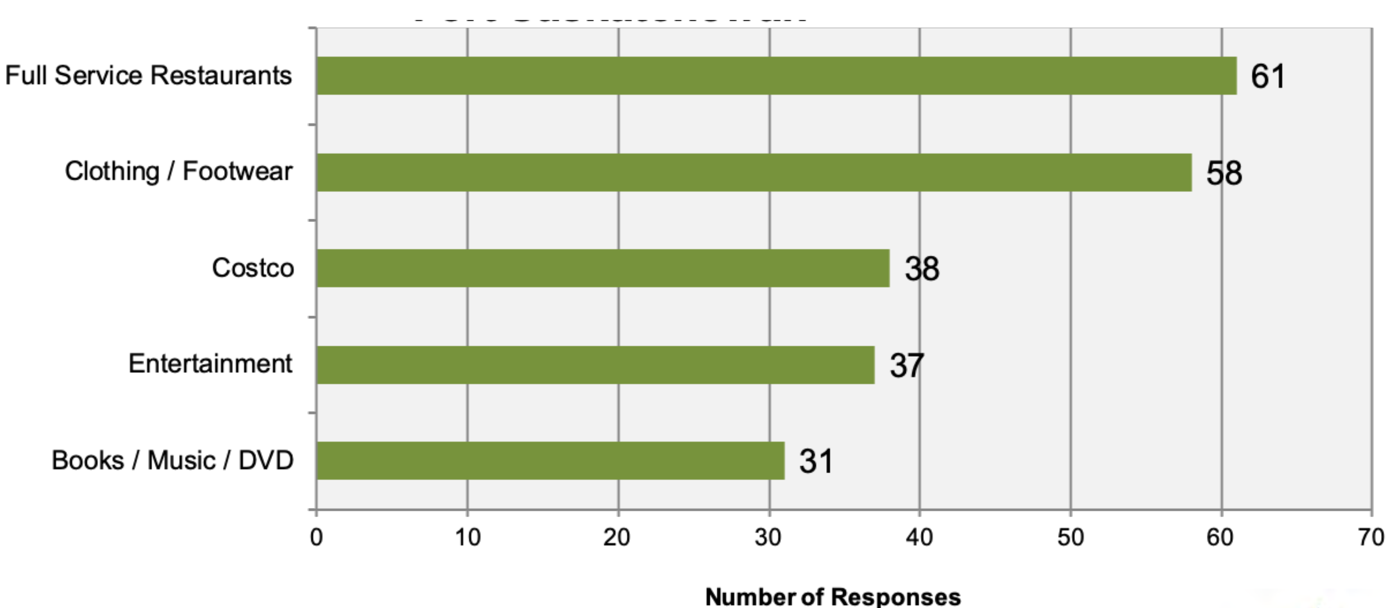


FIGURE 8.10

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

| Q25: New Stores or Services to Increase Spending/Visits in Fort Saskatchewan | 2014 | | 2019 | |
|---|---|---|---|---|
| Full Service Restaurants | 142 | 19% | 61 | 13% |
| Clothing / Footwear | 156 | 21% | 58 | 12% |
| Costco | 56 | 8% | 38 | 8% |
| Entertainment | 30 | 4% | 37 | 8% |
| Books / Music / DVD | 42 | 6% | 31 | 7% |
| Specialty Retail | 11 | 1% | 30 | 6% |
| Winners | 36 | 5% | 23 | 5% |
| Fitness Club / Day Spa | 7 | 1% | 23 | 5% |
| Grocery / Drug Store | 54 | 7% | 19 | 4% |
| Coffee Cafes / Fast Food | 44 | 6% | 19 | 4% |
| Sporting Goods | 31 | 4% | 19 | 4% |
| Toys / Hobbies / Crafts | 31 | 4% | 18 | 4% |
| Department store | 16 | 2% | 14 | 3% |
| Furnishings / Appliances | 16 | 2% | 13 | 3% |
| Nothing specific | 7 | 1% | 12 | 3% |
| Automotive | 6 | 1% | 11 | 2% |
| Electronics / Computers | 35 | 5% | 9 | 2% |
| Professional Financial services | 1 | 0% | 9 | 2% |
| A mall | 4 | 1% | 8 | 2% |
| Home Improvement & Garden | 7 | 1% | 5 | 1% |
| Personal Services | 3 | 0% | 5 | 1% |
| Transit | | 0% | 4 | 1% |
| Lower Prices | | 0% | 2 | 0% |
| Office Supply items | 6 | 1% | | 0% |
| Pet Supplies / Services | 5 | 1% | | 0% |
| **Total** | **746** | | **468** | |



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.

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.

Over the past 5 years, the City has been successful at adding retailers to the market that have been well-received by the consumers. At the same time a segment of the respondents also don't want to lose the "small town" charm that Fort Saskatchewan can offer and that is the true role that Downtown must play.

As Fort Saskatchewan continues to grow, it is to be expected that respondents will desire 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 6.10** which reveals overwhelming respondents' desires for the following:

1. Full Service Restaurants
2. Clothing & Footwear
3. Costco
4. Entertainment
5. Books & Media

Although not specifically probed in the 2019 Survey, respondents did identify categories for which specific tenants could be identified, as they were in 2014.

This specific list includes the following ten (10) branded retailers that could fulfill the categories noted previously and have the most impact on retaining spending in Fort Saskatchewan:

1. Costco (singled out by 8% of survey respondents)
2. Winners (singled out by 5% of respondents)
3. Indigo
4. Home Sense
5. Marshalls
6. Home Sense
7. Sport Chek
8. *The Keg*
9. *Earl's*
10. Brown's Social House

Many of these are likely to desire a location in high customer traffic and popular shopping areas such as Cornerstone or Westpark or perhaps the evolving Southridge area.

Cafes and coffee shops continue to be in high demand with optimal locations available throughout the City. The Downtown in particular is sought after for a cafe or coffee shop/specialty retail/bakery type of concept.

This suggests opportunities for more local independents, for whom areas in the Downtown core could be strong.

In downtowns like 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.

It is reasonable to assume that most recognized branded tenants, some of whom are already at Emerald Hills, such as Winners, Sport Chek etc may start to consider Fort Saskatchewan as part of their regional network strategy.

8.5
## SPENDING INSIDE VS OUTSIDE VS ONLINE

**Table 8.1 and Figures 8.11, 8.12& 8.13** summarize the average spending allocation by all consumer respondents by the estimated percentage of their spending that takes place inside Fort Saskatchewan, outside of Fort Saskatchewan or online.

Since 2014, the role of online spending and omni-channel retail has surged. However, while the fear that online retailing will usurp or be the death of physical bricks and mortar retail is often overstated, it is nonetheless a factor that retailers and communities must be aware of since it can affect retailers' locational and physical store network strategy.

Overall, survey respondents revealed that they spend an average of 51.4% of their spending inside Fort Saskatchewan, 41.6% outside of Fort Saskatchewan and 7.1% online.

Not unexpectedly, respondents spend most of their convenience purchases inside Fort Saskatchewan where proximity and price are paramount.

In general, most purchases made outside of Fort Saskatchewan continue to be in the DSTM or Comparison segments.

Of note however is the significant amount of online spending that occurs in the categories of:

1. Books & Media - 55.1%
2. Home & Personal Electronics 13.6%
3. Jewelry & Accessories - 11.9%
4. Specialty Retail - 9.6%
5. Clothing & Footwear - 9.1% each

A retailer like Indigo would be a prime target for Fort Saskatchewan that could fulfill the role of a physical presence and online presence, but also tick off many other boxes in the above noted online spending categories.

TABLE 8.1

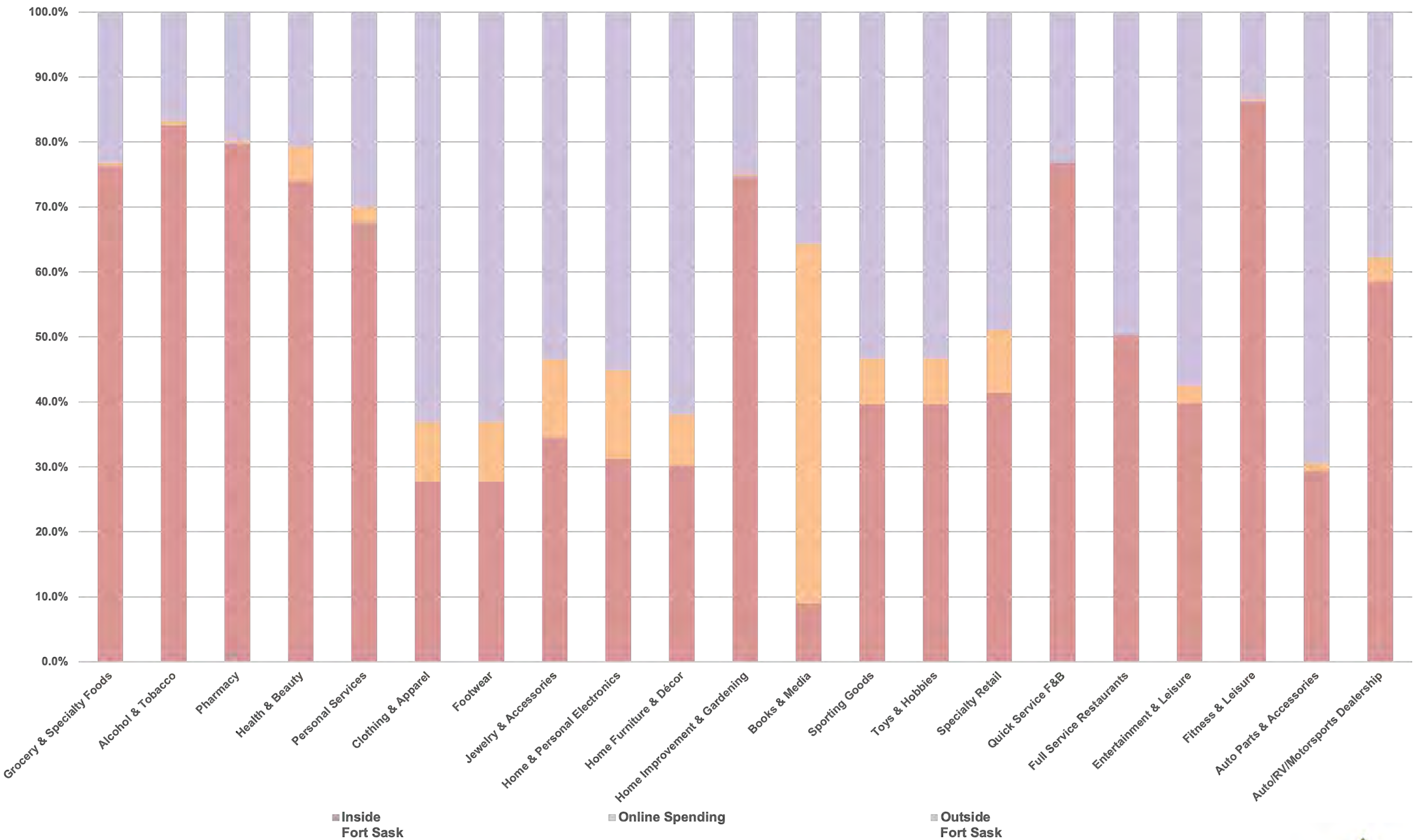
## SPENDING ALLOCATION - INSIDE - ONLINE - OUTSIDE FORT SASKATCHEWAN

| Retail Merchandise & Spending Category (INTERCEPT SURVEY) | Inside Fort Sask | Online Spending | Outside Fort Sask |
|---|---|---|---|
| Grocery/specialty foods/floral | 76.4% | 0.5% | 23.2% |
| Alcohol & Tobacco | 82.7% | 0.6% | 16.7% |
| Pharmacy (prescription and over-the-counter) | 79.8% | 0.4% | 19.8% |
| Health and beauty (fitness, barber, beauty salon, spa) | 74.0% | 5.4% | 20.6% |
| Personal/household services (eye glasses/lens, travel agent, post office/courier, dry cleaning/laundry, veterinarian, plumber, etc.) | 67.6% | 2.4% | 30.0% |
| Clothing, Apparel | 27.8% | 9.1% | 63.1% |
| Footwear | 27.8% | 9.1% | 63.1% |
| Jewellery and accessories | 34.6% | 11.9% | 53.5% |
| Home & Personal electronics/appliances | 31.3% | 13.6% | 55.1% |
| Home furnishings/accessories | 30.2% | 7.9% | 61.9% |
| Home Improvement & Gardening | 74.9% | 0.2% | 24.9% |
| Books and multimedia | 9.0% | 55.4% | 35.6% |
| Sporting Goods | 39.7% | 7.0% | 53.3% |
| Toys & Hobbies | 39.7% | 7.0% | 53.3% |
| Specialty Retail | 41.5% | 9.6% | 48.9% |
| Fast food restaurants & cafes (provide examples such as Subway, Tim Hortons, Starbucks, etc.) | 76.8% | 0.0% | 23.2% |
| Full service restaurants (provide examples such as Brown's Social House, Original Joes etc.) | 50.4% | 0.0% | 49.6% |
| Family entertainment & leisure (provide examples such as movie theatres, bowling alleys, etc.) | 39.8% | 2.8% | 57.4% |
| Fitness & Day Spa | 86.3% | 0.4% | 13.3% |
| Auto, RV & Motorsports Dealerships | 29.4% | 1.2% | 69.4% |
| Auto Parts, Maintenance & Accessories | 58.6% | 3.8% | 37.7% |
| | **51.4%** | **7.1%** | **41.6%** |



CITY OF FORT SASKATCHEWAN

FIGURE 8.11
## SPENDING ALLOCATION - INSIDE - ONLINE - OUTSIDE FORT SASKATCHEWAN






CITY OF FORT SASKATCHEWAN

FIGURE 8.12
## SPENDING INSIDE FORT SASKATCHEWAN - ALL SURVEY RESPONDENTS

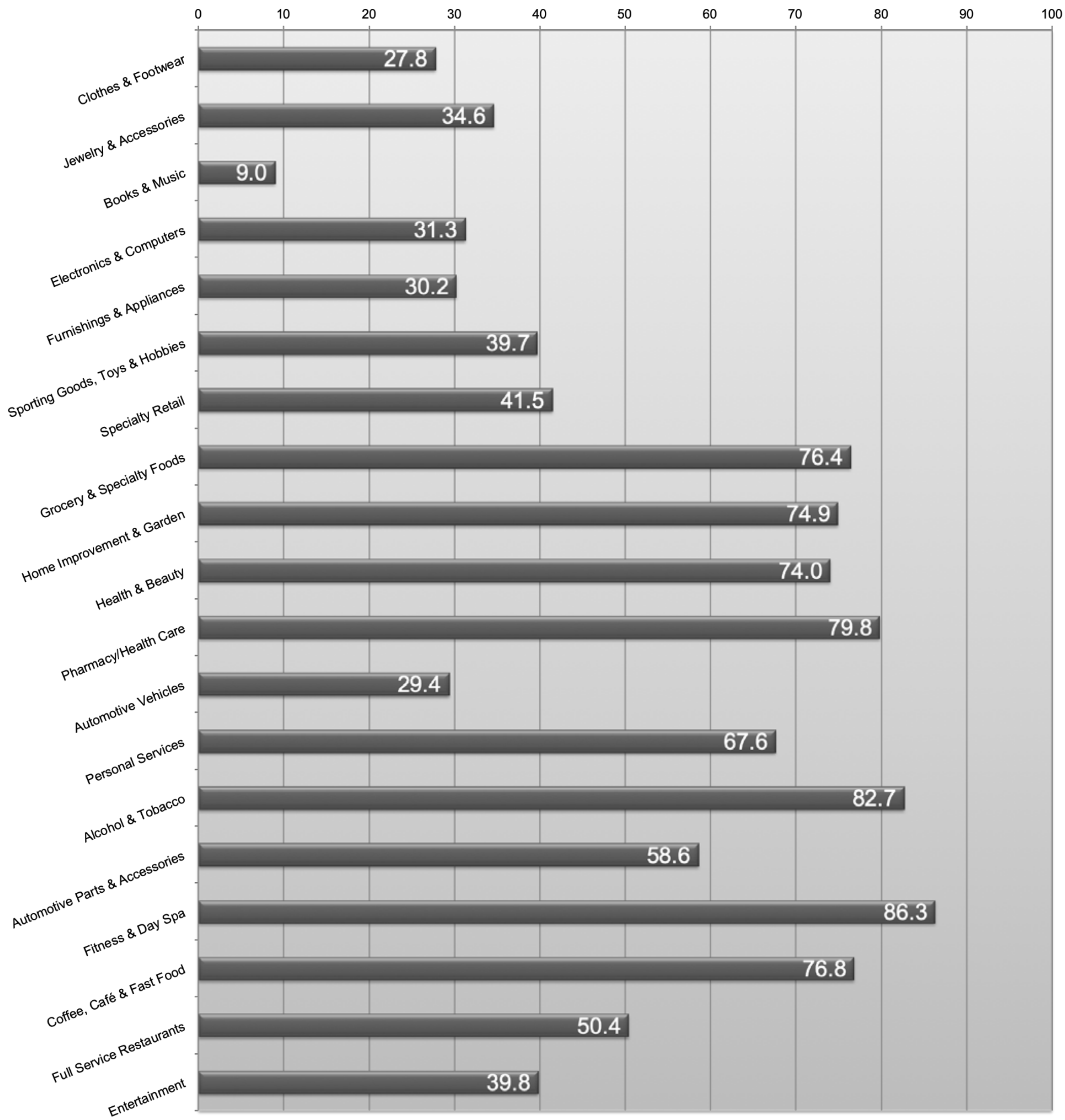
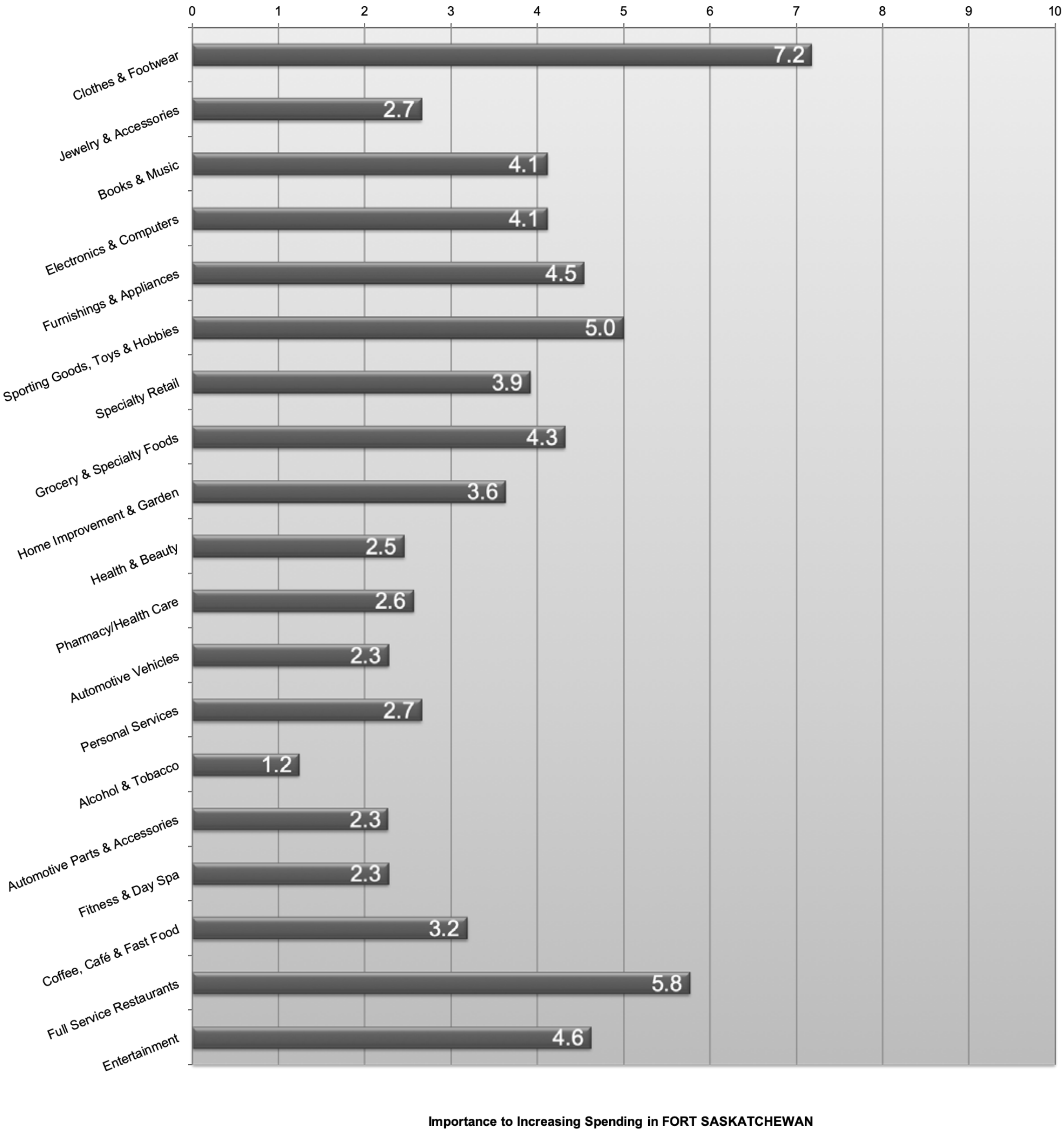


FIGURE 8.13

## IMPORTANCE TO SPENDING INSIDE FORT SASKATCHEWAN - ALL SURVEY RESPONDENTS



8.6

## ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

**Figure 8.14** take a more honed in approach in looking at the Consumer Responses by seeing where differences may exist in spending and importance ratings.

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 8.14** shows that the Clothing & Footwear have the lowest spending but are the most sought after retail with an importance rating above 7. Similarly, Full Service Restaurants, which do garner spending in the community, regardless have an importance rating of almost 6. Both of these represent the two most significant target categories.

It is worth noting though that the categories that were previously highlighted in their online spending have a correspondingly relatively high importance rating of higher than 4, which validates the potential opportunity to target a physical retailer that offers these categories as part of their overall omni-channel formula.

Grocery is a high spending and also relatively high importance ranking and this speaks to the quality and expectations around the most frequented retail commodity and an expectation that quality and price is important to consumers.

8.7

## 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 8.15 & 8.16** illustrate the spending and importance ratings for respondents as broken down into the Respondent Age Cohort.

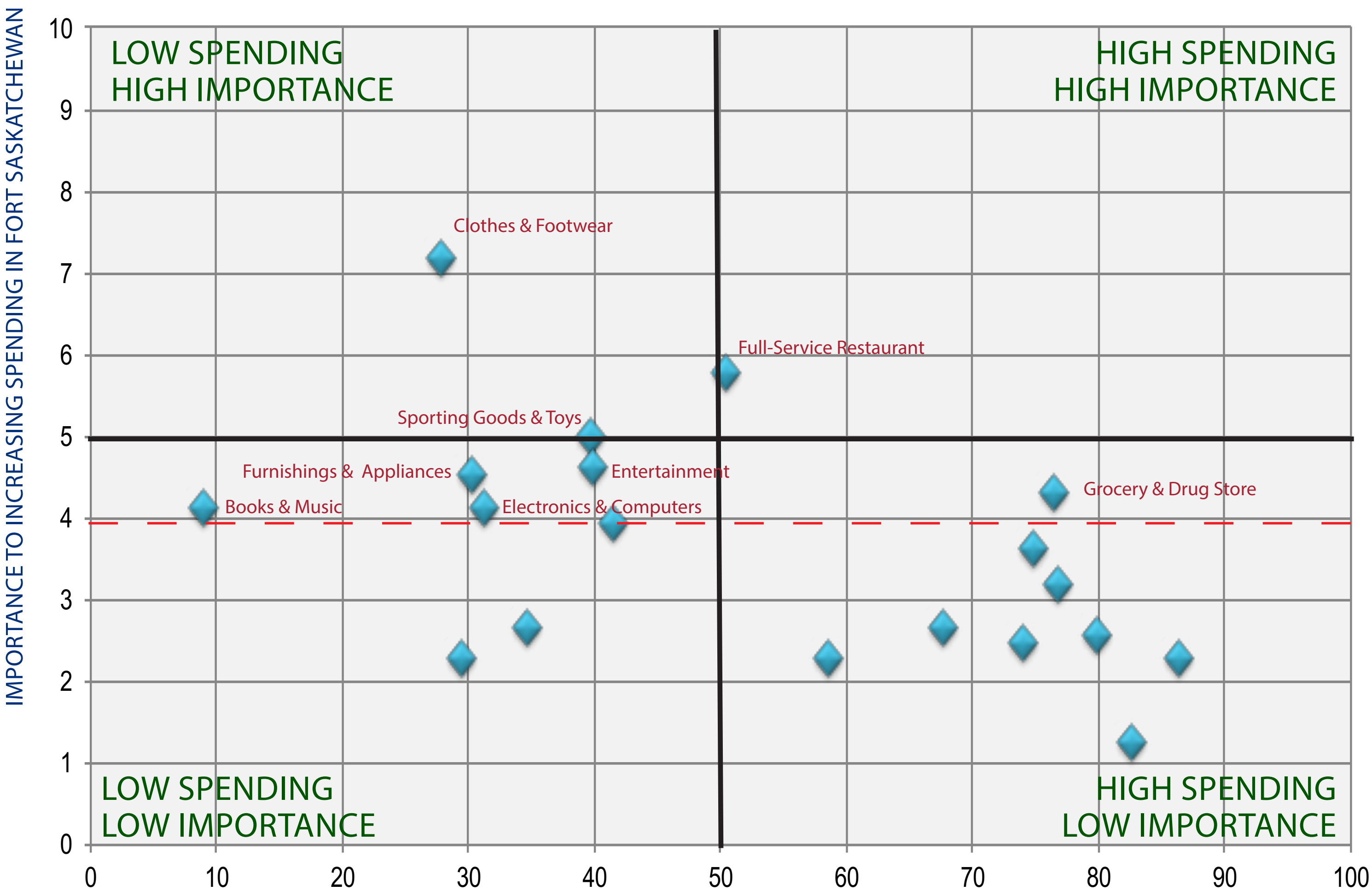
- *18 - 34 Years*
- *35 - 54 Years*
- *55 - 64 Years*
- *65 + Years*

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 Entertainment, Grocery, Specialty Retail, Health & Beauty, Food & Beverage, and Electronics. 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.

FIGURE 8.14

## SPENDING VERSUS IMPORTANCE RATINGS MATRIX FOR ALL RESPONDENTS






CITY OF FORT SASKATCHEWAN

FIGURE 8.15
## PERCENTAGE SPENDING IN FORT SASKATCHEWAN BY RESPONDENT AGE COHORT

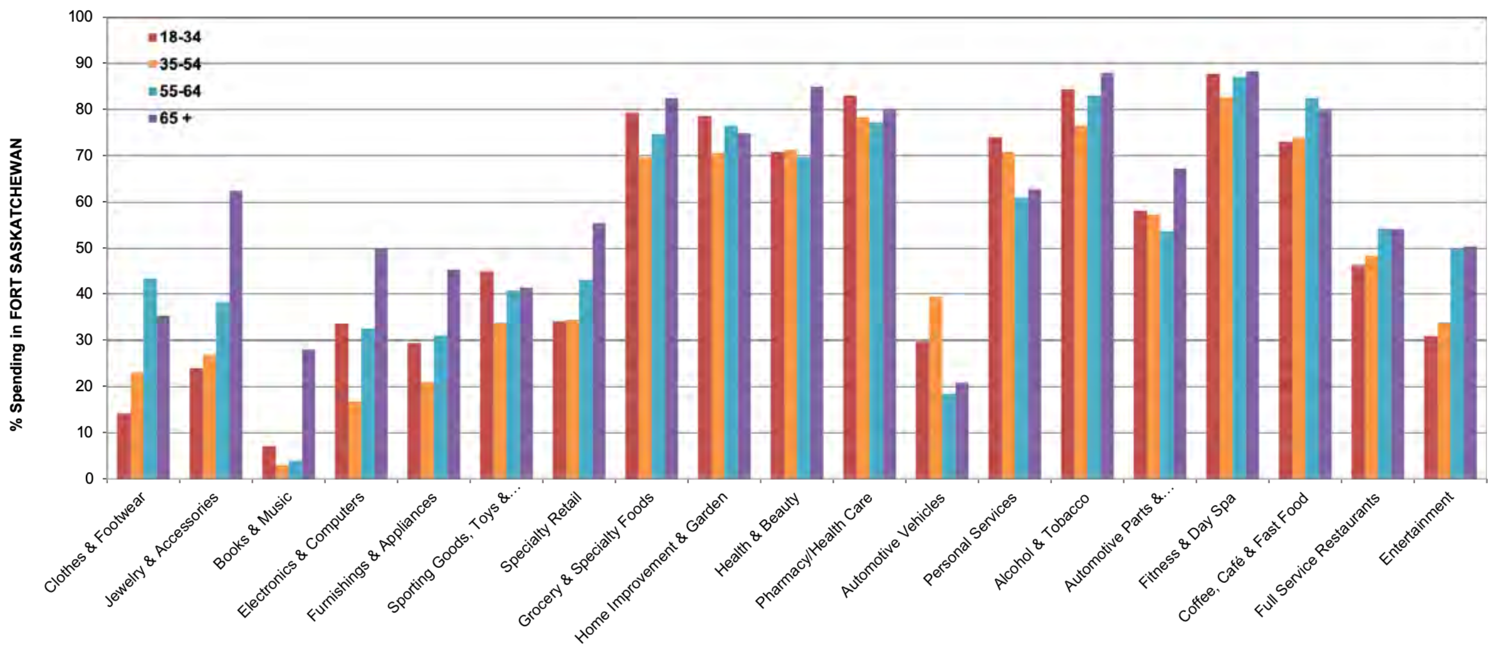
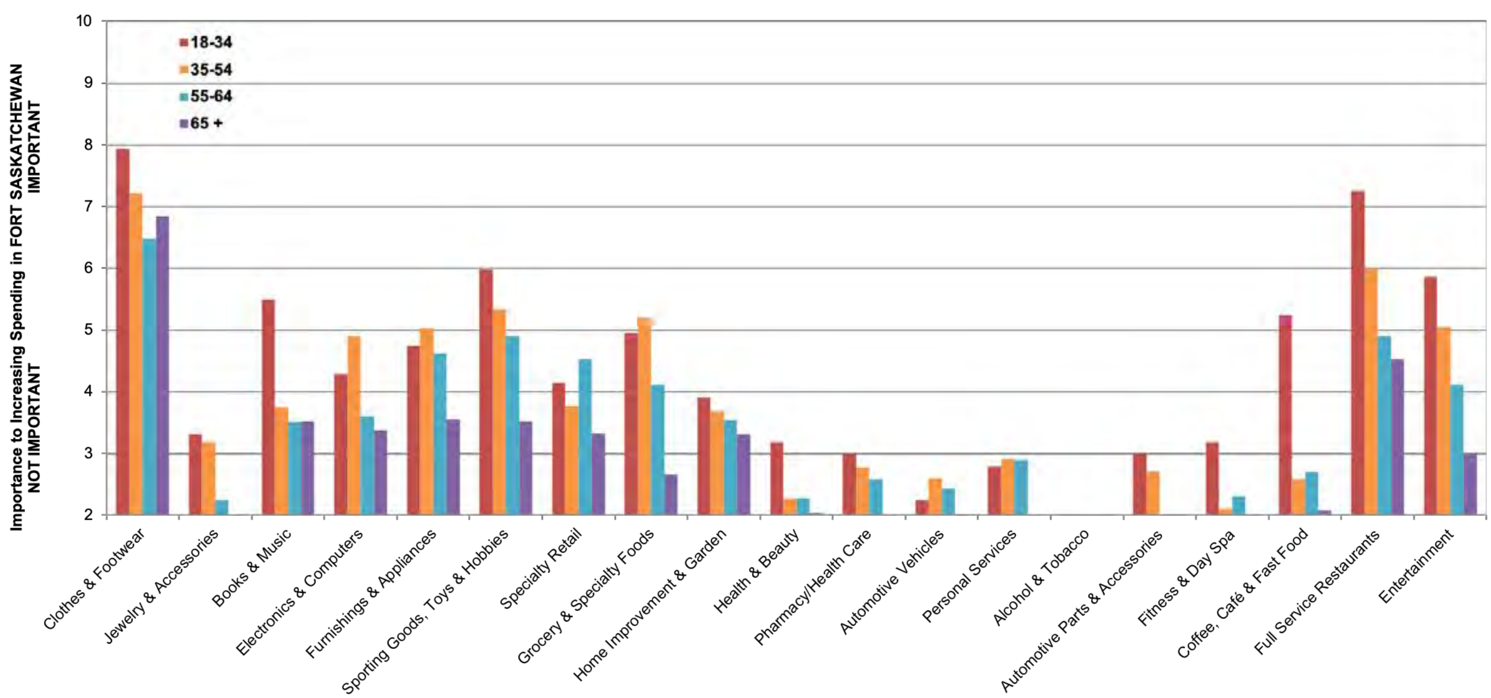



FIGURE 8.16
## IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT AGE COHORT



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 and supportive of 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.

The younger demographics are much more mobile in their shopping patterns, while the older demographics tend to shop closer to home. **Section 8.8** and in particular **Figure 8.19** provides a further breakdown of the online spending by age cohort which further illustrates the fickle nature of the younger demographics.

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. 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 8.17 & 8.18** illustrate the spending and importance ratings for respondents as broken down into the Respondent Household Income.

- *<$55,000*
- *$55,000 - $100,000*
- *>$100,000*

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.

FIGURE 8.17

## PERCENTAGE SPENDING IN FORT SASKATCHEWAN BY RESPONDENT HOUSEHOLD INCOME

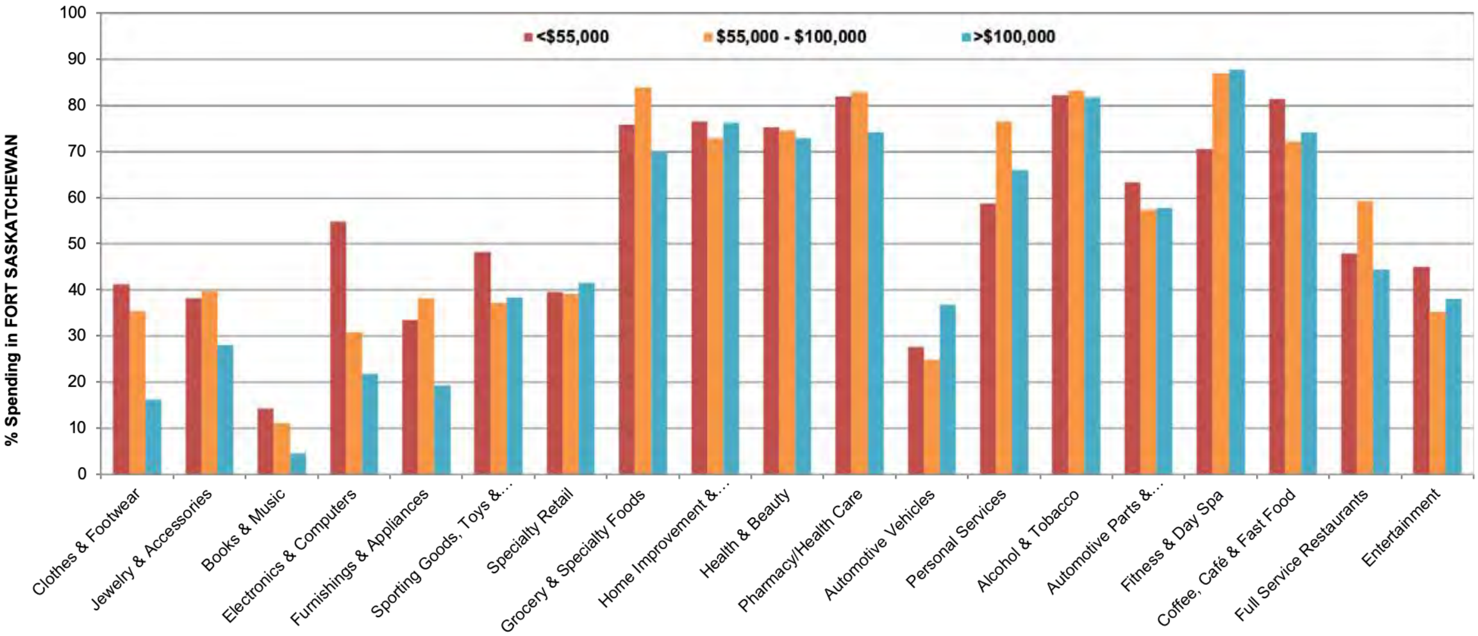
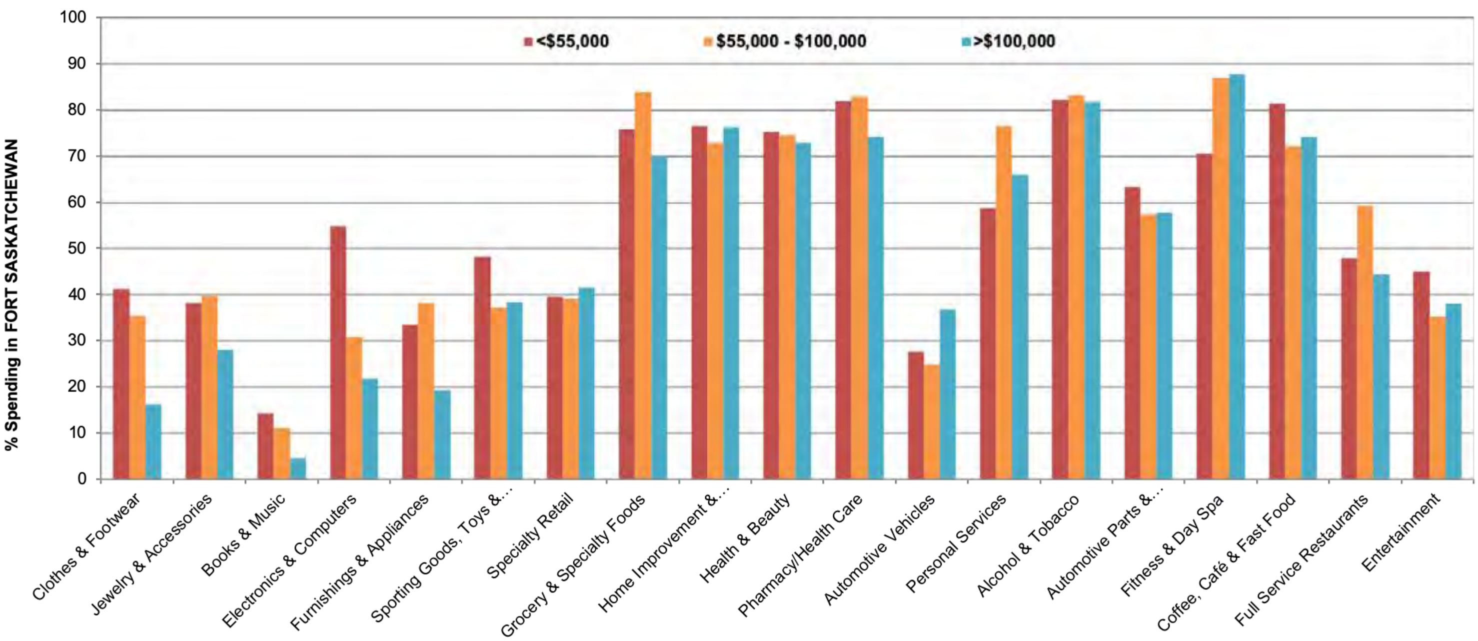



FIGURE 8.18

## IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT HOUSEHOLD INCOME



In fact, this is not the case whereby the income bracket comprising $55,000 to $100,000 exhibits the strongest expenditure patterns in the City for the majority of categories and in particular Full Service Restaurants, Grocery and Personal Services.

**Figure 6.18** illustrates a pattern whereby Clothing and Footwear,, Specialty Retail and Full Service Restaurants would be most desired by households earning less tan $55,000 while those in the $55,000 - $100,000 income bracket show a desire for more Sporting Goods & Toys and Home Improvement. 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.

Regardless of age though, all income segments exhibit generally the same desire to see more Clothing & Footwear, Sporting Goods & Toys and Full Service Restaurants in Fort Saskatchewan.

## 8.8 ONLINE SPENDING PATTERNS

Further to **Section 6.4**, the following provides a more in depth overview analysis of online spending trends and patterns. As retail trends continue to evolve and as concerns over traditional brick and mortar stores losing sales to online merchants continues, the Consumer Intercept Survey asked respondents about their spending patterns online.

In recent years, the advent of Wayfair has become very competitive in the Home Furnishing online market resulting in a competitive landscape for this category. However, it has not resulted in a decline in spending, whereby the strong home furnishings brands are still finding success in the physical format.

**Figure 8.19** reveals that the most prominent spending online is clearly by the 18-34 Year age cohort, as well as the 35-54 Year age cohort. **Figure 8.20** reveals the ratio of spending online spending to spending that takes place outside of Fort Saskatchewan. It clearly reveals the dominance that online purchases made on Books and Music has on overall spending, but also shows a definitive pattern of growth in online spending.

To further articulate the directions of online spending, which largely confirms the Consumer Intercept Survey results for Fort Saskatchewan, the following is extracted directly from a recent news article titled ***"Amazon Dominates Minds of Canadians Purchasing Online",*** June 28, 2019 (Mario Toneguzzi).

*The "Amazon Effect" continues to accelerate eCommerce in Canada, heating up the competition among retailers and brands and marketers that win are those that rise to meet changing consumer expectations head on.*

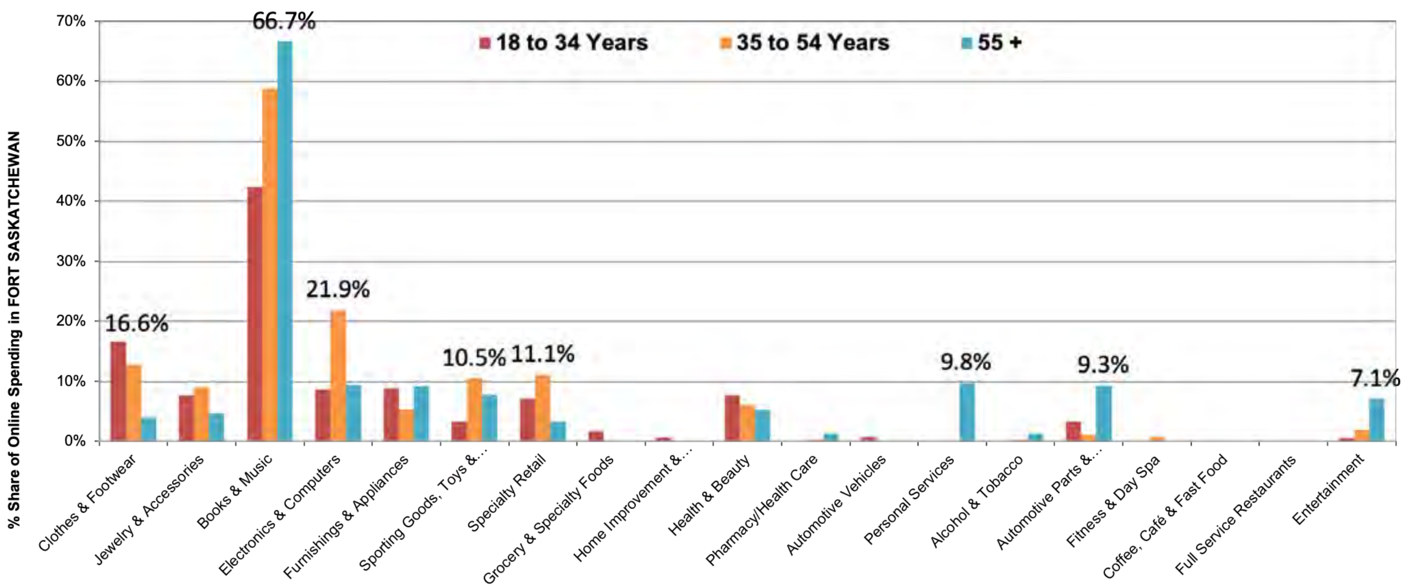
*The research, Rethink eCommerce by Reprise Digital, a digital marketing agency, found that in the last year 63%of those surveyed used Amazon to discover a new product, 88% were aware of Amazon's Prime program, and 42%of Canadian households hold a Prime membership.*

*Among Amazon shoppers, 78% say Amazon has the most efficient shipping and 84% say Amazon has the widest selection.*

*"Shopping behaviours are changing so quickly and brands need to understand that behaviour in order to keep up, come e-retail ready and capture their share of the digital shelf. That's why we named this Rethink eCommerce." (Matt Ramella, Managing Director, Reprise and Digital Partnerships). He said the most underdeveloped retail category is grocery. That is the largest opportunity for retailers moving forward "and the biggest nut to crack."*

FIGURE 8.19

## PERCENTAGE OF ONLINE SPENDING BY AGE COHORT




*The research also found the following:*

*Canadians are more likely to purchase Toys & Games, Appliances and Baby products online from Amazon than other retailers. 26% of Canadians are more likely to purchase appliances on Amazon versus 12% who would purchase from Costco;*

*When purchasing Grocery, Patio & Garden, Health & Beauty, Books and Clothing Amazon is neck and neck with other well-known retailers such as Walmart, Shoppers Drug Mart and Indigo. For the grocery category, 22% of Canadians are more likely to purchase from Walmart and 21% to purchase from Amazon;*

*In Canada, Furniture, Electronics and Automotive categories are dominated by category specific eRetailers. 26% of Canadians are more likely to purchase furniture from Wayfair than Amazon;*

*The largest weekly online shopping cohort, 34%, is the 35 to 44 year old age bracket. This group grew up in the age of media and digital transformation, making them more comfortable with technology and more apt to shop online.*

*They have more disposable income than younger generations, making them a prime audience for online shopping;*

*99% of those surveyed researched a product online regardless if they bought it in-store or online;*

*For 68%, the biggest deterrent to online shopping is the shipping fee while for 18 to 34 year olds they're most concerned about getting products fast.*

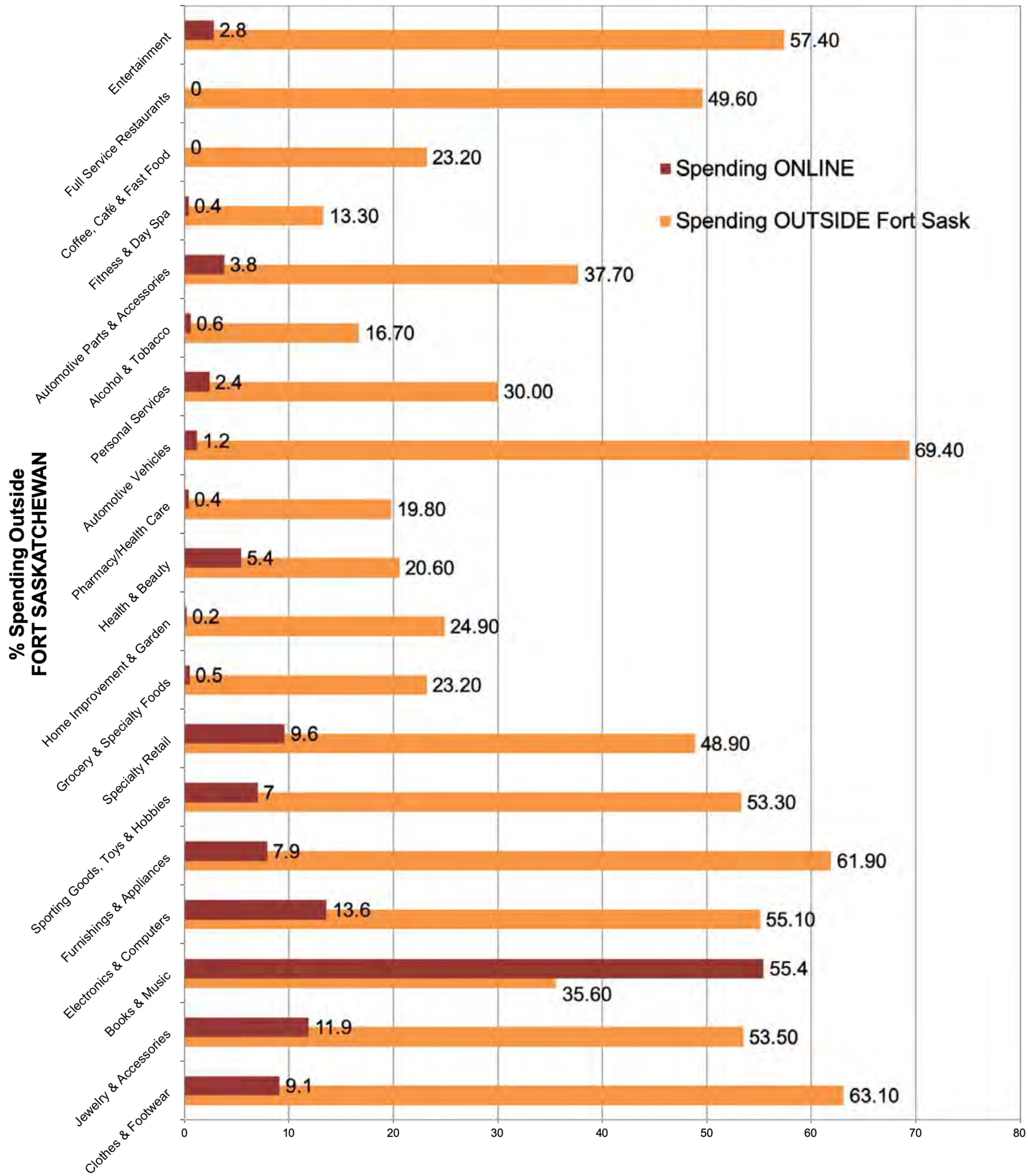
*From a points of friction standpoint, Reprise found that shipping time and shipping fees were the primary points of friction for online purchase and that's especially more prevalent with the younger end of the demographic - Millennials for example.*

*The study also found that the older end of the demographic was also concerned about missing out on that human element of shopping that one often gets when shopping in-store.*

*Convenience is the main reason why Canadians like shopping online and its ease of research.*

FIGURE 8.20

## RATIO OF ONLINE TO OUTSIDE SPENDING BY ALL SURVEY RESPONDENTS



*"We do know that Amazon dominates the minds of Canadians when they purchase online. It also is front and centre as we work with our clients across the eCommerce space.*

*From a purchase perspective in the study, 75% of respondents shopped on Amazon in the past six months and the next closest retailers in the Canadian market are Walmart at 31% and Costco 29%. There's a significant difference between number one and the rest."*

*The research found that shoppers are using Amazon product details and reviews even when they don't buy on Amazon and Amazon stores have become a one-stop shop for branding, reviews and purchase.*

*The research also showed that 85% of respondents say they are likely to shop at Amazon in the future followed by 52%t at Costco and 50% at Walmart.*

*Amazon is the dominant retailer when it comes to the Toys & Games, Appliances and Baby categories. It is competitive in Grocery, Patio & Garden, Health & Beauty, Books, and Clothing. It is trailing in Furniture, Electronics and Automotive.*

*Retail expert Bruce Winder said Amazon is the new Walmart as it relates to channel power with suppliers, especially smaller ones.*

*"Smaller suppliers have really no bargaining power with Amazon and are forced to capitulate on whatever terms and conditions they demand. Amazon's ecosystem is just too big to ignore for all suppliers now. One of the major risks for all suppliers is Amazon using supplier metrics to build its own private labels to eventually displace them," he said.*

*"I find it interesting that consumers are purchasing merchandise online from category specialists like Wayfair over Amazon.*

*This may be a clue for retailers trying to survive against Amazon by building niche businesses. Also, the research may show the level of comfort Millennials have with Amazon as baby products and toys are leading categories. This will no doubt be a distant early warning for other retailers that sell products used as consumers age through their life stage. Finally, it shows that existing, large established brick and mortar retailers are holding their own in select categories online. It appears that the large investments made at retailers like Walmart, Shoppers and the like have paid off at least for now."*

## 8.9 SUMMARY & IMPLICATIONS

The Consumer Intercept Survey yielded findings that continue to solidify the strong local support for the City of Fort Saskatchewan, but also illustrates the emerging regional draw.

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

Fort Saskatchewan is well positioned to attract new-to-market retailers, some of whom may already have locations in northeast Edmonton at Emerald Hills and/or Manning Town Centre.

Specifically though, Fort Saskatchewan should use the Consumer Survey trends that suggest targeting the quality of tenants over the quantity of retailers thereby infill existing retail nodes and 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 Downtown is the ideal location to house Specialty Retail, independent Full Service Restaurants and Cafes.

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.

The older age cohorts are the most loyal to the current retail offering in Fort Saskatchewan, largely because this segment chooses not to travel distances for the type of retail they seek, with some exceptions for very specific products.

On the other side, the younger age cohorts are not only mobile in terms of where they will spend their money, but also very active in online shopping which further contributes to their spending outflow.

Fort Saskatchewan can retain greater levels of spending in the community if it targets specific retail categories and specifically retail brands that fulfill consumers desires and keeps them closer to home.

With the continued expansion of commercial activity in northeast Edmonton and the further congestion in the region, consumers will look for shops and services closer to home more frequently than in the past. There may still be exceptions for true destination retailers, but for the majority of retailers, their strategic planning is built on providing stores where there is a large enough population base and convenient access to that population base.

Fort Saskatchewan has rapidly evolved into becoming such a market, with a trade area that will reach almost 72,000 by 2023.

# 9 conclusions

## 9.1 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 63,000 residents and is forecast to pass 82,000 by 2028.
- The City of Fort Saskatchewan currently has approximately 1.30 million sq. ft. of total retail space with a vacancy of only 5.3% (excluding new and under construction).
- The City currently has residual demand for approximately 445,000 sq. ft.
- Future growth forecasts suggest the City could conservatively accommodate an additional 386,000 sq. ft. of new retail space by 2028 (not including residual demand).
- Competitive influences from neighbouring areas to the south will continue, particularly Emerald Hills and Manning Town Centre although it is expected that Fort Saskatchewan's location and regional draw to the north and northeast will provide a stable environment for attracting retail that may already have locations in Emerald Hills or Manning Town Centre.
- Fort Saskatchewan's retail inventory is well-positioned to provide community scale appeal for day-to-day necessities as well as casual comparison items such as everyday Apparel, Sporting Goods and Toys & Hobbies.

Since 2014, when the original study was undertaken, Fort Saskatchewan has been continued to establish itself as a regional hub. While the City's population has continued to grow at healthy rates with corresponding spending growth, the performance of the existing retail has stayed relatively the same and with the increasing competition occurring south in northeast Edmonton, the City now has sales outflow from its residents.

Although Fort Saskatchewan's trade area has been increased from the original 2014 study, the City's productivity and core sales still largely emanates from its local region.

63,032

CITY OF FORT SASKATCHEWAN PRIMARY TRADE AREA (2018 Y/E ESTIMATE)

47%

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

$1.2 BILLION

TOTAL TRADE AREA RETAIL SPENDING (YEAR END 2018 ESTIMATE)

1.30 Million

RETAIL INVENTORY IN CITY OF FORT SASKATCHEWAN

445,000

CURRENT RESIDUAL RETAIL DEMAND (YEAR END 2018 ESTIMATE)

5.3%

CITY OF FORT SASKATCHEWAN RETAIL VACANCY
(excluding new & under construction)

Photo credit: Kieron Hunt

- Fort Saskatchewan has a net sales outflow of $37 million (Y/E 2018 estimate), comprising predominantly comparison categories.
- Fort Saskatchewan does a very good job of retaining and attracting Convenience Spending with a net inflow of $22 million.
- Fort Saskatchewan garners strong inflow from Limited Service Restaurants ($32.7 million) and Home Improvement ($26.8 million).
- Fort Saskatchewan's Primary Trade Area penetration of the Full-Service Restaurant category could be stronger (currently at an estimated 50%).
- Fort Saskatchewan's major leakage occurs in Auto/RV/Motorsports ($67.4 million), Home Furnishings ($44.6 million), Books & Media ($16.3 million), Fashion ($13.9 million), Arts & Entertainment ($6.5 million) and Full Service Restaurants ($6.1 million).
- Consumer Survey Respondents would like to see more Full-Service Restaurants, Clothing & Footwear and Sporting Goods, Toys & Hobbies 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.

**The Top 5 tenant prospects based on a combination of market readiness and consumer sentiment are:**

1. **Winners or Marshalls**
2. **Sport Chek**
3. **Home Sense**
4. **Real Canadian Superstore**
5. **Brown's Social House**

**Table 9.1** provides a more detailed list of potential tenant prospects for Fort Saskatchewan along with an estimated timeline as to whether they are short term (next 5 years) or longer term targets (5 to 10 years).

Bigger ticket items such as Auto and Recreational Vehicles as well as Comparison categories (or Department Store Type Merchandise DSTM) will still exhibit outflow dollars from the community and this will likely be the case over the next 5-10 years as Fort Saskatchewan continues to evolve as its own regional hub for retail and services.

*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 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 2028.

TABLE 9.1

## LIST OF TARGET TENANTS BY SHORT OR LONGER TERM TIMING/COMPATIBILITY

| Target Retailers | Merchandise Category Segment | Time Horizon Near Term Present to 2025 | Time Horizon Long Term 2025 to 2030 (or beyond) |
|---|---|---|---|
| Wine & Beyond | Alcohol & Tobacco | | ✓ |
| Cap-It | Auto Parts & Accessories | | ✓ |
| Princess Auto | Auto Parts & Accessories | ✓ | |
| Indigo | Books & Media | ✓ | |
| Alia n Tanjay | Clothing & Accessories | ✓ | |
| Ardene | Clothing & Accessories | ✓ | |
| Children's Place | Clothing & Accessories | ✓ | |
| Marshall's | Clothing & Accessories | ✓ | |
| Old Navy | Clothing & Accessories | ✓ | |
| Pennington's | Clothing & Accessories | ✓ | |
| Winners | Clothing & Accessories | ✓ | |
| Hudsons | Drinking Establishment | | ✓ |
| Tilted Kilt | Drinking Establishment | | ✓ |
| Cineplex | Entertainment | | ✓ |
| Brown's Social House | F&B Restaurant - Full Service | ✓ | |
| Chili's | F&B Restaurant - Full Service | ✓ | |
| Moxie's Classic Grill | F&B Restaurant - Full Service | | ✓ |
| Mr. Mikes | F&B Restaurant - Full Service | ✓ | |
| Red Lobster | F&B Restaurant - Full Service | | ✓ |
| Red Robin | F&B Restaurant - Full Service | | ✓ |
| State & Main Kitchen | F&B Restaurant - Full Service | ✓ | |
| Swiss Chalet | F&B Restaurant - Full Service | ✓ | |
| Tony Roma's | F&B Restaurant - Full Service | | ✓ |
| Olive Garden | F&B Restaurant - Full Service | | ✓ |
| Arby's | F&B Restaurant - Quick Service | | ✓ |
| Carl's Junior | F&B Restaurant - Quick Service | ✓ | |
| Cora's | F&B Restaurant - Quick Service | ✓ | |
| Famoso Neapolitan Pizzeria | F&B Restaurant - Quick Service | ✓ | |
| Five Guys Burger & Fries | F&B Restaurant - Quick Service | ✓ | |
| Freshii | F&B Restaurant - Quick Service | ✓ | |
| Good Earth Coffee | F&B Restaurant - Quick Service | | ✓ |
| Harvey's | F&B Restaurant - Quick Service | | ✓ |
| Milestones | F&B Restaurant - Quick Service | | ✓ |
| Mr. Sub | F&B Restaurant - Quick Service | ✓ | |
| Nando's Chicken | F&B Restaurant - Quick Service | | ✓ |
| Oodle Noodle | F&B Restaurant - Quick Service | ✓ | |
| The Keg | F&B Restaurant - Quick Service | | ✓ |
| Waves Coffee | F&B Restaurant - Quick Service | ✓ | |
| Orange Theory Fitness | Fitness & Leisure | ✓ | |
| Oxygen Yoga | Fitness & Leisure | ✓ | |
| COSTCO | General Merchandise | | ✓ |
| Goodwill | General Merchandise | ✓ | |
| London Drugs | General Merchandise | | ✓ |
| Real Canadian Superstore | General Merchandise | ✓ | |
| Value Village | General Merchandise | ✓ | |
| Save On Foods | Grocery & Conveniences | | ✓ |
| Lush | Health & Beauty | | ✓ |
| Ashley Furniture | Home Furnishings & Décor | | ✓ |
| Bed Bath & Beyond | Home Furnishings & Décor | | ✓ |
| Bouclair | Home Furnishings & Décor | | ✓ |
| Daniadown | Home Furnishings & Décor | | ✓ |
| Home Sense | Home Furnishings & Décor | ✓ | |
| JYSK | Home Furnishings & Décor | ✓ | |
| Structube | Home Furnishings & Décor | ✓ | |
| Urban Barn | Home Furnishings & Décor | | ✓ |
| Peavey Mart | Home Improvement & Gardening | | ✓ |
| Sport Clips | Personal Service | ✓ | |
| Tommy Gun's | Personal Service | ✓ | |
| Bulk Barn | Specialty Retail | ✓ | |
| Global Pet Foods | Specialty Retail | ✓ | |
| Michael's Crafts | Specialty Retail | ✓ | |
| Petsmart | Specialty Retail | ✓ | |
| Sport Chek | Sporting Goods | ✓ | |
| Mastermind Toys | Toys, Games & Hobbies | ✓ | |



CITY OF FORT SASKATCHEWAN

COSTCO WHOLESALE

WINNERS

HOMESENSE
Irresistible finds. Exceptional prices.

REAL CANADIAN SUPERSTORE

Value Village
Good deeds. Great deals.

MASTERMIND toys

THE CHOPPED LEAF
chef designed SALADS | WRAPS | SOUPS

SPORTCHEK

LUSH

OODLE NOODLE

STATE & MAIN
KITCHEN • BAR

FIVE GUYS
BURGERS and FRIES

Famoso
NEAPOLITAN PIZZERIA

OLD NAVY

Olive Garden
ITALIAN RESTAURANT

RED ROBIN
GOURMET BURGERS

freshii

Marshalls

JYSK

LONDON DRUGS

orangetheory
FITNESS

MR.SUB

cora

save on foods
SO MUCH more IN STORE

chili's

THE CHILDREN'S PLACE

BROWNS SOCIALHOUSE
restaurant.bar.socialize

Carl's Jr.
CHARBROILED BURGERS

daniadown
HOME

Indigo

Good Earth
COFFEEHOUSE AND BAKERY

RICKI'S

ALIA N TANJAY

Canadian Hudsons Tap House

Tilted Kilt
PUB & EATERY

GLOBAL PET FOODS
Canada's Healthy Choice For Pets

Photo credit: Kieron Hunt

RETAIL
Market & Gap Analysis

City of Fort Saskatchewan

# APPENDICES

Member of International Council of Shopping Centers

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keyfax market research

PO Box 85041 RPO Willoughby Centre | Langley, B.C. Canada | V2Y 0W3 | 604.314.3780 p



CITY OF FORT SASKATCHEWAN

A

# DETAILED RETAIL INVENTORY

Shaded area reflects changes in retail inventory since last study was completed in 2018

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Real Canadian Liquor Store | 8802 100 ST, Unit:120 | 101st/Hwy 15 | CENTRAL | Alcohol & Tobacco | 5,485 |
| Ace Liquor (was Liquor Barn) | 9532 86 AV | Cornerstone | CENTRAL | Alcohol & Tobacco | 2,723 |
| Spirits on 101 Liquor | 10106 88 AV | South Fort | CENTRAL | Alcohol & Tobacco | 1,960 |
| NOVA Cannabis (Units 101 & 103) | 9310 SOUTHFORT DR Bldg F Unit F1 F2 | Southpointe | CENTRAL | Alcohol & Tobacco | 2,587 |
| Solo Liquor | 9310 SOUTHFORT DR, Bldg F Unit F8 | Southpointe | CENTRAL | Alcohol & Tobacco | 3,958 |
| Fountain Tire | 9910 86 AV | 101st/Hwy 15 | CENTRAL | Auto Parts & Accessories | 13,411 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Auto Parts & Accessories | 15,000 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Auto Parts & Accessories | 8,000 |
| PartSource Auto Parts | 8818 111 ST, Unit:144 | Eastgate | CENTRAL | Auto Parts & Accessories | 3,835 |
| Kal Tire | 9320 SOUTHFORT DR | Southpointe | CENTRAL | Auto Parts & Accessories | 9,722 |
| Jiffy Lube | 10080A 88 AV | 101st/Hwy 15 | CENTRAL | Auto Service | 1,375 |
| Straightline Chrysler Dodge | 11116 88 AV, Fort Saskatchewan, AB T8L3I | Eastgate | CENTRAL | Auto/RV/Motorsports Dealership | 13,729 |
| Straightline Chrysler Dodge (was Crackmasters) | 8818 111 ST, Unit:116 | Eastgate | CENTRAL | Auto/RV/Motorsports Dealership | 2,500 |
| E&S Motorcycles | 8812 111 ST | Eastgate Industrial | CENTRAL | Auto/RV/Motorsports Dealership | 5,000 |
| South Fort Chevrolet | 10109 89 AV | South Fort | CENTRAL | Auto/RV/Motorsports Dealership | 15,406 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Books & Multi-Media | |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Books & Multi-Media | 1,000 |
| Reitman's | 8701 94 ST, Unit:117 | Cornerstone | CENTRAL | Clothing & Apparel | 7,818 |
| Warehouse One | 9410 86 AV, Unit:101 | Cornerstone | CENTRAL | Clothing & Apparel | 2,799 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Clothing & Apparel | 1,000 |
| Lammle's Western Wear | 9538 86 AV | Cornerstone | CENTRAL | Clothing & Apparel | 4,365 |
| Mark's | 9550 86 AV | Cornerstone | CENTRAL | Clothing & Apparel | 5,570 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Clothing & Apparel | 40,000 |
| Fas GasPlus | 10102 88 AV | 101st/Hwy 15 | CENTRAL | Convenience Store | 582 |
| Mobil Mart Gas Bar (was FasGas) | 8802 100 ST, Unit:110 | South Fort | CENTRAL | Convenience Store | 500 |
| Coop Gas & Convenience | 9284A SOUTHFORT DR | Southpointe | CENTRAL | Convenience Store | 2,650 |
| Dance at Brijets | 8818 111 ST, Unit:170 | Eastgate | CENTRAL | Arts & Entertainment | 4,618 |
| Goodlife Fitness | 9304 SOUTHFORT DR | Southpointe | CENTRAL | Fitness & Leisure | 25,000 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Footwear | 500 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Footwear | 2,000 |
| Pho Hoan Pasteur Restaurant | 10010 86 AV, Unit:105 | 101st/86th Ave | CENTRAL | Full Service F&B | 3,000 |
| Fatburger | 8631 94 ST, Unit:101 | Cornerstone | CENTRAL | Full Service F&B | 1,724 |
| Boston Pizza | 8751 94 ST | Cornerstone | CENTRAL | Full Service F&B | 6,799 |
| Modo Mio Italian Restaurant | 8818 111 ST, Unit:172 | Eastgate | CENTRAL | Full Service F&B | 1,937 |
| Roustabout's Restaurant | 10115 88 AV | South Fort | CENTRAL | Full Service F&B | 5,562 |
| Humpty's Family Restaurant | 8815 101 ST | South Fort | CENTRAL | Full Service F&B | 4,127 |
| Original Joe's | 9372 SOUTHFORT DR, Unit:103 | Southpointe | CENTRAL | Full Service F&B | 2,041 |
| No Frills | 8802 100 ST, Unit:100 | 101st/Hwy 15 | CENTRAL | Grocery & Specialty Foods | 34,383 |
| Get Real Natural Health Food | 8701 94 ST | Cornerstone | CENTRAL | Grocery & Specialty Foods | 1,024 |
| M & M Meat Shop | 8701 94 ST, Unit:103 | Cornerstone | CENTRAL | Grocery & Specialty Foods | 1,024 |
| Safeway | 9450 86 AV | Cornerstone | CENTRAL | Grocery & Specialty Foods | 42,660 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Grocery & Specialty Foods | 500 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Grocery & Specialty Foods | 40,000 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Health & Beauty | |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Health & Beauty | 4,000 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Home Electronics & Appliances | 2,000 |
| The Source | 9542 86 AV | Cornerstone | CENTRAL | Home Electronics & Appliances | 3,455 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Home Electronics & Appliances | 10,000 |
| Eagle Rock Computers | 8818 111 ST, Unit:1244 | Eastgate | CENTRAL | Home Electronics & Appliances | 1,000 |
| The Brick | 8701 94 ST, Unit:121 | Cornerstone | CENTRAL | Home Furnishings & Accessories | 10,966 |
| The Brick Mattresses | 9410 86 AV, Unit:102 | Cornerstone | CENTRAL | Home Furnishings & Accessories | 2,791 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Home Furnishings & Accessories | 5,000 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Home Furnishings & Accessories | 10,000 |
| Fort Distillery (was Red-E Flooring) | 8818 111 ST, Unit:128 | Eastgate | CENTRAL | Drinking Establishment | 2,176 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Home Improvement & Gardening | 15,000 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Home Improvement & Gardening | 8,000 |
| Manderly Sod & Seed | 8818 111 ST, Unit:160 | Eastgate | CENTRAL | Home Improvement & Gardening | 2,500 |
| Home Hardware Building Centre | 8817 111 ST | Eastgate Industrial | CENTRAL | Home Improvement & Gardening | 17,175 |



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| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Home Depot | 9280 SOUTHFORT DR | Southpointe | CENTRAL | Home Improvement & Gardening | 85,020 |
| Places of Worship and Places of Rest | 8818 111 ST, Unit 112 | Eastgate | CENTRAL | Institutional | 3,000 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Jewelry & Accessories | |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Jewelry & Accessories | 2,000 |
| Quiznos | 10010 88 AV, Unit:103 | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 1,331 |
| Tim Hortons | 10080 88 AV | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 2,320 |
| KFC Taco Bell | 10090 88 AV | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 1,922 |
| Pizza Hut | 8802 100A ST | 101st/Hwy 15 | CENTRAL | Limited Service F&B | 2,474 |
| Papa John's Pizza | 8631 94 ST, Unit:105 | Cornerstone | CENTRAL | Limited Service F&B | 1,298 |
| Edo Grill Sushi | 8631 94 ST, Unit:109 | Cornerstone | CENTRAL | Limited Service F&B | 1,514 |
| Subway | 8701 94 ST, Unit:111 | Cornerstone | CENTRAL | Limited Service F&B | 1,024 |
| Extreme Pita | 8701 94 ST, Unit:113 | Cornerstone | CENTRAL | Limited Service F&B | 1,055 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Limited Service F&B | |
| McDonalds - WalMart | 9551 87 AV | Cornerstone | CENTRAL | Limited Service F&B | 1,500 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Limited Service F&B | 2,000 |
| A & W | 10101 88 AV | South Fort | CENTRAL | Limited Service F&B | 2,162 |
| Subway | 10114 88 AV | South Fort | CENTRAL | Limited Service F&B | 1,153 |
| McDonalds | 9551 87 AV | South Fort | CENTRAL | Limited Service F&B | 5,432 |
| Little Caesars | 9310 SOUTHFORT DR, Bldg F Unit F4 | Southpointe | CENTRAL | Limited Service F&B | 1,334 |
| Cobs Bread | 9310 SOUTHFORT DR, Bldg F Unit F5 | Southpointe | CENTRAL | Limited Service F&B | 1,325 |
| Chopped Leaf | 9310 SOUTHFORT DR, Bldg F Unit F7 | Southpointe | CENTRAL | Limited Service F&B | 1,334 |
| Domino's Pizza | 9372 SOUTHFORT DR, Unit:119 | Southpointe | CENTRAL | Limited Service F&B | 1,079 |
| Starbucks Coffee | 9378 SOUTHFORT DR, Unit:101 | Southpointe | CENTRAL | Limited Service F&B | 1,779 |
| Wok Box | 9378 SOUTHFORT DR, Unit:103 | Southpointe | CENTRAL | Limited Service F&B | 1,571 |
| Mucho Burrito | 9378 SOUTHFORT DR, Unit:109 | Southpointe | CENTRAL | Limited Service F&B | 1,571 |
| Café Bench | 8708 101 ST | Stars Inn & Suites | CENTRAL | Limited Service F&B | 750 |
| FYi doctors | 8701 94 ST, Unit:101 | Cornerstone | CENTRAL | Personal Services | 3,169 |
| VO's Nails | 8701 94 ST, Unit:107 | Cornerstone | CENTRAL | Personal Services | 1,024 |
| Supercuts | 8701 94 ST, Unit:109 | Cornerstone | CENTRAL | Personal Services | 1,024 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Personal Services | |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Personal Services | 1,000 |
| Money Mart | 10110 88 AV | South Fort | CENTRAL | Personal Services | 1,864 |
| Q Nails | 9332 SOUTHFORT DR, Unit:107 | Southpointe | CENTRAL | Personal Services | 1,119 |
| Great Clips | 9372 SOUTHFORT DR, Bldg F Unit F5 | Southpointe | CENTRAL | Personal Services | 1,325 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Pharmacy | |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Pharmacy | 4,000 |
| Guardian Pharmacy (Yakimet's) | 10101 86 AV, Unit:101 | South Fort | CENTRAL | Pharmacy | 3,047 |
| Shoppers Drug Mart | 9360 SOUTHFORT DR | Southpointe | CENTRAL | Pharmacy | 16,448 |
| Fort Walk In Clinic | 10010 86 AV, Unit 113 | 101st/86th Ave | CENTRAL | Professional Services | 1,100 |
| Dr. Oyelwole | 10010 86 AV, Unit 117 | 101st/86th Ave | CENTRAL | Professional Services | 1,100 |
| Fort Medical | 9421 94 AV | 101st/86th Ave | CENTRAL | Professional Services | 1,100 |
| Zimmerman Chiropractic | 10010 88 AV, Unit:101 | 101st/Hwy 15 | CENTRAL | Professional Services | 1,165 |
| Active Physio Works | 8701 94 ST, Unit:104 | Cornerstone | CENTRAL | Professional Services | 2,000 |
| Bank of Montreal | 8725 94 ST | Cornerstone | CENTRAL | Professional Services | 5,987 |
| Cornerstone Dental Centre | 9410 86 AV, Unit:101 | Cornerstone | CENTRAL | Professional Services | 2,277 |
| Unique Financial Services (Fort Investments) | 8818 111 ST | Eastgate | CENTRAL | Professional Services | 2,054 |
| Scotiabank | 9310 SOUTHFORT DR | Southpointe | CENTRAL | Professional Services | 4,350 |
| Fort Physical Therapy/Active Physio Works | 9332 SOUTHFORT DR, Unit:101 | Southpointe | CENTRAL | Professional Services | 2,355 |
| Medical Clinic | 9368 SOUTHFORT DR | Southpointe | CENTRAL | Professional Services | 4,085 |
| Cann/Amm Occupational Therapy | 9372 SOUTHFORT DR, Unit:109 | Southpointe | CENTRAL | Professional Services | 749 |
| DynaLIFE Laboratory Services | 9372 SOUTHFORT DR, Unit:109 | Southpointe | CENTRAL | Professional Services | 3,483 |
| Medical Imaging Consultants | 9372 SOUTHFORT DR, Unit:109 | Southpointe | CENTRAL | Professional Services | 5,876 |
| South Fort Dental | 9372 SOUTHFORT DR, Unit:115 | Southpointe | CENTRAL | Professional Services | 2,596 |
| H & R Block | 9378 SOUTHFORT DR, Unit:107 | Southpointe | CENTRAL | Professional Services | 1,571 |
| ATCO Gas | 8818 111 ST, Unit 120 | Eastgate | CENTRAL | Public Service | |
| Dollarama | 8802 100 ST, Unit:100 | 101st/Hwy 15 | CENTRAL | Specialty Retail | 10,123 |
| Telus | 8701 94 ST, Unit:105 | Cornerstone | CENTRAL | Specialty Retail | 1,024 |
| PetValu | 9410 86 AV, Unit:103 | Cornerstone | CENTRAL | Specialty Retail | 2,717 |



CITY OF FORT SASKATCHEWAN

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Staples | 9410 86 AV, Unit:107 | Cornerstone | CENTRAL | Specialty Retail | 12,862 |
| Your Dollar Store With More | 9410 86 AV, Unit:109 | Cornerstone | CENTRAL | Specialty Retail | 3,580 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Specialty Retail | 5,000 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Specialty Retail | 10,000 |
| Supplement King (Unit 105) | 9310 SOUTHFORT DR Bldg F Unit F3 | Southpointe | CENTRAL | Specialty Retail | 1,229 |
| Mobil Klinik Rogers | 9332 SOUTHFORT DR, Unit:105 | Southpointe | CENTRAL | Specialty Retail | 1,080 |
| Bone n Biscuit | 9378 SOUTHFORT DR, Unit:105 | Southpointe | CENTRAL | Specialty Retail | 1,571 |
| Winners Way Source for Sports | 8802 100 ST, Unit:70 | 101st/Hwy 15 | CENTRAL | Sporting Goods & Outdoor Recrea | 9,976 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Sporting Goods & Outdoor Recrea | 8,000 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Sporting Goods & Outdoor Recrea | 4,000 |
| Canadian Tire | 9510 86 AV | Cornerstone | CENTRAL | Toys & Hobbies | 8,000 |
| WalMart | 9551 87 AV | Cornerstone | CENTRAL | Toys & Hobbies | 4,000 |
| Unit 109 SOLD | 10010 86 AV, Unit 109 | 101st/86th Ave | CENTRAL | VACANT | 750 |
| Unit 111 SOLD | 10010 86 AV, Unit 111 | 101st/86th Ave | CENTRAL | VACANT | 2,000 |
| Vacant CRU Unit 115 | 10010 86 AV, Unit 115 | 101st/86th Ave | CENTRAL | VACANT | 1,200 |
| Vacant CRU Unit 201 | 10010 86 AV, Unit 201 | 101st/86th Ave | CENTRAL | VACANT | 1,200 |
| Vacant (former Century 21 Realty) | 10010 88 AV, Unit:105 | 101st/Hwy 15 | CENTRAL | VACANT | 1,097 |
| VACANT (was Payless Shoe Source) | 8701 94 ST, Unit:115 | Cornerstone | CENTRAL | VACANT | 1,629 |
| Vacant Unit 130 | 8818 111 ST, Unit 130 | Eastgate | CENTRAL | VACANT | 2,000 |
| Vacant Unit 140 | 8818 111 ST, Unit 140 | Eastgate | CENTRAL | VACANT | 4,500 |
| PAD Available 2018 | 9310 SOUTHFORT DR | Southpointe | CENTRAL | VACANT | 5,000 |
| PAD Available 2018 | 9310 SOUTHFORT DR Bldg F Unit F1 | Southpointe | CENTRAL | VACANT | 3,500 |
| Vacant (behind Hampton Inn & A&W) | | Eastgate | CENTRAL | VACANT NEW | 1,000 |
| Vacant (behind Hampton Inn & A&W) | | Eastgate | CENTRAL | VACANT NEW | 1,000 |
| Vacant (behind Hampton Inn & A&W) | | Eastgate | CENTRAL | VACANT NEW | 1,000 |
| Vacant (behind Hampton Inn & A&W) | | Eastgate | CENTRAL | VACANT NEW | 1,000 |
| Vacant (behind Hampton Inn & A&W) | | Eastgate | CENTRAL | VACANT NEW | 1,000 |
| Daddeos Smoke Shop | 10309A 100 AV | Downtown 100th Ave | DOWNTOWN | Alcohol & Tobacco | 759 |
| Vape Shop | 10309 99 AV | Downtown 99th Avenu | DOWNTOWN | Alcohol & Tobacco | 750 |
| ACE Liquor | UNIT 301 10451 99 AVE | Fort Station | DOWNTOWN | Alcohol & Tobacco | 1,500 |
| P2 Psquared Vapes | 10404 99 AV, Unit:116 | Market Square | DOWNTOWN | Alcohol & Tobacco | 1,158 |
| 99th Avenue Liquor Store | 10002B 99 AV | Station Square | DOWNTOWN | Alcohol & Tobacco | 1,837 |
| Tirecraft | 10308 99 AV | Downtown 99th Ave | DOWNTOWN | Auto Parts & Accessories | 5,000 |
| Napa Auto Parts | 10404 99 AV, Unit:100C | Market Square | DOWNTOWN | Auto Parts & Accessories | 5,274 |
| Fort Gasland | 10402 100 AV | Downtown 103rd St | DOWNTOWN | Auto Service | 2,028 |
| Crystal Glass | 9918 103 ST | Downtown 103rd St | DOWNTOWN | Auto Service | 2,848 |
| Roadready Auto Service | 9902 103 ST | Downtown 99th Ave | DOWNTOWN | Auto Service | 2,071 |
| Wee Care Family Day Home | 9904 103 ST | Downtown 103rd St | DOWNTOWN | Child Care Services | 1,500 |
| Greenland Day Care | 9906 104 ST | Downtown 104th St | DOWNTOWN | Child Care Services | 3,465 |
| Little Wonders Daycare | 9811 108 ST | Downtown 108th St | DOWNTOWN | Child Care Services | 2,000 |
| Treehouse Daycare | 10470 98 AV, Unit:513 | Fort Station | DOWNTOWN | Child Care Services | 2,000 |
| Positivity Preschool (A Fairy Tale Beginning) | 10470 98 AV, Unit:515 | Station Square | DOWNTOWN | Child Care Services | 2,343 |
| Street Kings | 10327 99 AV | Downtown 99th Ave | DOWNTOWN | Clothing & Apparel | 964 |
| Giant Tiger | 10404 99 AV, Unit:100A | Market Square | DOWNTOWN | Clothing & Apparel | 17,375 |
| Esso C Store | 140 SOUTHRIDGE BLVD | Downtown 99th Ave | DOWNTOWN | Convenience Store | 1,265 |
| Husky Food Store | 9821 102 ST | Downtown 99th Ave | DOWNTOWN | Convenience Store | 3,628 |
| 7-Eleven | 10303 99 AV | Downtown 99th Avenu | DOWNTOWN | Convenience Store | 1,754 |
| The Bear's Den | 9923 102 ST | Downtown 102nd St | DOWNTOWN | Drinking Establishment | 6,925 |
| Hybrid Martial Arts | 9606 102 ST | Downtown 102nd St | DOWNTOWN | Fitness & Leisure | 1,250 |
| Dance Moves III | 9917 102 ST | Downtown 102nd St | DOWNTOWN | Arts & Entertainment | 3,969 |
| Fort Lanes | 9936 102 ST | Downtown 102nd St | DOWNTOWN | Arts & Entertainment | 6,805 |
| Vacant (former Jump Family Entertainment Centre) | 10410 98 AV, Unit:401 | Fort Station | DOWNTOWN | VACANT | 13,100 |
| Vacant (former Fort Gymnastics) | 10421 99 AV, Unit 111 | Fort Station | DOWNTOWN | VACANT | 6,000 |
| Snap Fitness | 10471 99 AV, Unit:601 | Fort Station | DOWNTOWN | Fitness & Leisure | 8,000 |
| 9 Round Kickboxing | 10471 99 AV, Unit:611 | Fort Station | DOWNTOWN | Fitness & Leisure | 1,250 |
| Dollarama (former Snap Fitness) | 10004 99 AV | Station Crossing | DOWNTOWN | Specialty Retail | 10,092 |
| Fort Cinemas | 9922 100 ST | Station Square | DOWNTOWN | Arts & Entertainment | 7,818 |
| Fort Family Restaurant at Hotel Brandt | 10001 103 ST | Downtown 100th Ave | DOWNTOWN | Full Service F&B | 1,271 |
| House of Hong Chinese Restaurant | 10207 100 AV | Downtown 100th Ave | DOWNTOWN | Full Service F&B | 1,750 |



CITY OF FORT SASKATCHEWAN

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| VN Express Restaurant | 10213 100 AV | Downtown 100th Ave | DOWNTOWN | Full Service F&B | 1,067 |
| The Atlantic Kitchen Restaurant | 9904 102 ST | Downtown 102nd St | DOWNTOWN | Full Service F&B | 1,873 |
| Happy Kitchen (Formerly Capital Pizza & Steakhouse) | 9907 103 ST, Unit:101 | Downtown 103rd St | DOWNTOWN | Full Service F&B | 2,575 |
| Eggcellent P'Eats | 9908 103 ST, Unit:1 | Downtown 103rd St | DOWNTOWN | Full Service F&B | 2,603 |
| Pot's Bar & Grill Restaurant | 9821 108 ST | Downtown 108th St | DOWNTOWN | Full Service F&B | 2,997 |
| New Saigon Oriental Noodle House | 10470 98 AV, Unit:511 | Fort Station | DOWNTOWN | Full Service F&B | 1,500 |
| Hanabi Japanese | 10404 99 AV, Unit:168B | Market Square | DOWNTOWN | Full Service F&B | 2,750 |
| Co-op | 10004 99 AV | Station Square | DOWNTOWN | Grocery & Specialty Foods | 40,480 |
| Spa Experience by Candace | 10309D 100 AV | Downtown 100th Ave | DOWNTOWN | Health & Beauty | 750 |
| Sunrae Massage & Wellness | 10304 99 AV | Downtown 99th Ave | DOWNTOWN | Health & Beauty | 750 |
| Imperial Appliances | 9807 101 ST | Downtown 101st St | DOWNTOWN | Home Electronics & Appliances | 1,327 |
| CnH Appliances | 9919 101 ST | Downtown 101st St | DOWNTOWN | Home Electronics & Appliances | 2,962 |
| MOD Kitchen Closets | 102100 100 Ave | Downtown 100th Ave | DOWNTOWN | Home Furnishings & Accessories | 1,500 |
| Red-E Flooring (Formerly Kinney's Sweet Retreat Café | 9905 102 ST | Downtown 100th Ave | DOWNTOWN | Home Furnishings & Accessories | 1,250 |
| Hunter Douglas Blinds | 9940 99 AV Unit: 100 | Station Crossing | DOWNTOWN | Home Furnishings & Accessories | 2,000 |
| Canuck Plumbing & Heating | 9904 103 ST | Downtown 103rd St | DOWNTOWN | Home Improvement & Gardening | 3,872 |
| Life Church | 10421 99 AV, Unit 111 | Fort Station | DOWNTOWN | Institutional | 2,000 |
| Fort Saskatchewan Newspaper | 10404 99 AV, Unit:168A | Market Square | DOWNTOWN | Institutional | 1,500 |
| Roland's Jewelry (& Trophy Den) | 10307 100 AV | Downtown 100th Ave | DOWNTOWN | Jewelry & Accessories | 2,847 |
| Gold and Diamond Boutique | 10308 100 AV | Downtown 100th Ave | DOWNTOWN | Jewelry & Accessories | 1,172 |
| City Donair and Kebab | 10203 100 AV | Downtown 100th Ave | DOWNTOWN | Limited Service F&B | 1,170 |
| Millers Ice Cream Food Truck | 9909 102 ST | Downtown 102nd St | DOWNTOWN | Limited Service F&B | 224 |
| Perry's Pizza and Pasta | 9805 108 ST | Downtown 108th St | DOWNTOWN | Limited Service F&B | 911 |
| Vacant (former Jump n Bean Café in Jump Centre) | 10410 98 AV, Unit:401 | Fort Station | DOWNTOWN | VACANT | 500 |
| Sky Hi Pizza & Donair | 10404 99 AV | Market Square | DOWNTOWN | Limited Service F&B | 1,100 |
| Dairy Queen | 9910 99 AV | Station Crossing | DOWNTOWN | Limited Service F&B | 2,111 |
| Pizza 73 | 10002 99 AV | Station Square | DOWNTOWN | Limited Service F&B | 2,867 |
| Simply Stunning Hair | 10203 100 AV | Downtown 100th Ave | DOWNTOWN | Personal Services | 750 |
| The Fort Barber Shop | 10204C 100 AV | Downtown 100th Ave | DOWNTOWN | Personal Services | 692 |
| Flo's Beauty Salon | 10208 100 AV | Downtown 100th Ave | DOWNTOWN | Personal Services | 1,093 |
| Church Tattooing | 10209 100 AV | Downtown 100th Ave | DOWNTOWN | Personal Services | 910 |
| The Art of Nails | 10309 100 Ave | Downtown 100th Ave | DOWNTOWN | Personal Services | 717 |
| Fort Cleaners and Coin Laudry | 10406 100 AV | Downtown 100th Ave | DOWNTOWN | Personal Services | 2,569 |
| Ann's Day Care | 9811 101 ST | Downtown 101st St | DOWNTOWN | Personal Services | 3,245 |
| Ann's After School | 9818 102 ST | Downtown 102nd St | DOWNTOWN | Personal Services | 8,000 |
| Friendly Nails | 9904 102 ST | Downtown 102nd St | DOWNTOWN | Personal Services | 955 |
| Fort Shoe Repair | 9910 102 ST | Downtown 102nd St | DOWNTOWN | Personal Services | 611 |
| Kidco Childcare | 9907 103 ST, Unit:101 | Downtown 103 ST | DOWNTOWN | Personal Services | 2,000 |
| Mike's Hair | 10401B 100 AV | Downtown 104th St | DOWNTOWN | Personal Services | 630 |
| Hidden Gem Hair Salon | 10102 98 AV | Downtown 98th Ave | DOWNTOWN | Personal Services | 750 |
| Ragnarok Studios | 10102 98 AV | Downtown 98th Ave | DOWNTOWN | Personal Services | 805 |
| La Perla Hair Studio | 10111 99 AV | Downtown 99th Ave | DOWNTOWN | Personal Services | 1,163 |
| Wash Land Coin Laundry | 10206 99 AV | Downtown 99th Ave | DOWNTOWN | Personal Services | 983 |
| Frankie's Barber Shop | 10321 99 AV | Downtown 99th Ave | DOWNTOWN | Personal Services | 945 |
| Fake and Bake Tanning Salon | 9824 102 ST | Downtown 99th Ave | DOWNTOWN | Personal Services | 972 |
| Legendary Barber Shop | 9903 102 ST | Downtown 99th Ave | DOWNTOWN | Personal Services | 750 |
| Platinum Skin Laser Lash & Skin | 10451 99 AV, Unit:305 | Fort Station | DOWNTOWN | Personal Services | 750 |
| Shadified Salon & Spa | 10451 99 AV, Unit:309 | Fort Station | DOWNTOWN | Personal Services | 1,000 |
| Fort Sask Tailors | 10404 99 AV, Unit:148 | Market Square | DOWNTOWN | Personal Services | 1,500 |
| Body Unique Fitness | 9940 99 AV Unit 10 | Station Crossing | DOWNTOWN | Personal Services | 2,000 |
| Cel Fix | 10002 99 AV | Station Square | DOWNTOWN | Personal Services | 750 |
| Faces Spa and Salon | 10401 100 AV | Station Square | DOWNTOWN | Personal Services | 2,714 |
| PharmaChoice Medical Clinic | 10490 98 AV, Unit:629 | Fort Station | DOWNTOWN | Pharmacy | 3,584 |
| PharmaChoice Pharmacy | 10490 98 AV, Unit:629 | Fort Station | DOWNTOWN | Pharmacy | 3,649 |
| Investment Planning Counsel Corporation | 10202B 100 AV | Downtown 100th Ave | DOWNTOWN | Professional Services | 1,000 |
| The Cooperators M. Friel Agencies | 10214 100 AV | Downtown 100th Ave | DOWNTOWN | Professional Services | 2,712 |
| Fort Sask Chiropractic Centre | 10308 100 AV | Downtown 100th Ave | DOWNTOWN | Professional Services | 1,585 |

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Akashik Bookeepers | 10309C 100 AV | Downtown 100th Ave | DOWNTOWN | Professional Services | 1,000 |
| Fort Saskatchewan Veterinary Clinic | 10408 100 AV | Downtown 100th Ave | DOWNTOWN | Professional Services | 1,779 |
| Pinder Chiropractic | 10101 100 AV | Downtown 101st St | DOWNTOWN | Professional Services | 1,354 |
| CIBC | 9903 101 ST | Downtown 101st St | DOWNTOWN | Professional Services | 4,474 |
| Apropos Therapy Centre | 9911 101 ST | Downtown 101st St | DOWNTOWN | Professional Services | 1,238 |
| Fort Dental Clinic | 10010 88 AV, Unit:201 | Downtown 102nd St | DOWNTOWN | Professional Services | 1,687 |
| Strathcona Denture Clinic | 9807 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 1,543 |
| Paul Hotke CPA | 9807102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 1,390 |
| Smith Insurance/NE Capital Industrial Assc (Up) | 9902 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 3,222 |
| Alberta Tax Service | 9906A 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 2,015 |
| Edward Jones Investments | 9906B 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 1,939 |
| Drayden Insurance | 9907 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 2,684 |
| RBC | 9916 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 5,901 |
| CPA Insurance Plans West | 9918A 102 ST | Downtown 102nd St | DOWNTOWN | Professional Services | 1,114 |
| Remax | 9909 103 ST | Downtown 103rd St | DOWNTOWN | Professional Services | 2,000 |
| Serenity Funeral Home | 9914 103 ST | Downtown 103rd St | DOWNTOWN | Professional Services | 2,500 |
| Kjenner Financial Services (Sun Life) | 9915B 103 ST | Downtown 103rd St | DOWNTOWN | Professional Services | 986 |
| Chamber of Commerce | 9923 103 ST | Downtown 103rd St | DOWNTOWN | Professional Services | 10,000 |
| Keppler Vanderzalm Accountants (Switzer) | 9923 103 ST | Downtown 103rd St | DOWNTOWN | Professional Services | 3,118 |
| Century 21 Real Estate | 9804 104 ST | Downtown 104th St | DOWNTOWN | Professional Services | 2,000 |
| Greenwood Medical Clinic | 9804A 104 ST | Downtown 104th St | DOWNTOWN | Professional Services | 5,254 |
| Financial Statement & Tax(Fort City Financial) | 9804B 104 ST | Downtown 104th St | DOWNTOWN | Professional Services | 1,000 |
| Back to Alignment | 9804C 104 ST | Downtown 104th St | DOWNTOWN | Professional Services | 1,250 |
| Fort Orthodontics | 9837 104 ST | Downtown 104th St | DOWNTOWN | Professional Services | 1,250 |
| Precision Hearing | 9801 108 ST | Downtown 108th St | DOWNTOWN | Professional Services | 903 |
| Next Step Senior High | 9807 108 ST | Downtown 108th St | DOWNTOWN | Professional Services | 4,000 |
| Liberty Tax Service | 10109 99 AV | Downtown 99th Ave | DOWNTOWN | Professional Services | 1,500 |
| Wild Rose Animal Clinic | 10315 99 AV | Downtown 99th Ave | DOWNTOWN | Professional Services | 904 |
| Servus | 9839 104 ST | Downtown 99th Ave | DOWNTOWN | Professional Services | 3,543 |
| A-Win Insurance | 9901 103 ST | Downtown 99th Ave | DOWNTOWN | Professional Services | 1,040 |
| Royal LePage Realty | 10451 99 AV, Unit:317 | Fort Station | DOWNTOWN | Professional Services | 1,000 |
| Time For Taxes | 10404 99 AV, Unit:120 | Market Square | DOWNTOWN | Professional Services | 831 |
| Smilemakers Dental Centre | 10404 99 AV, Unit:144 | Market Square | DOWNTOWN | Professional Services | 2,633 |
| Vivid Vision Optometrist | 10404 99 AV, Unit:156 | Market Square | DOWNTOWN | Professional Services | 1,249 |
| Careers Under Construction | 10404 99 AV, Unit:162 | Market Square | DOWNTOWN | Professional Services | 1,000 |
| Fort Saskatchewan Dental Clinic | 9918 99 AV | Station Crossing | DOWNTOWN | Professional Services | 2,607 |
| Doderai Dental Group | 9918 99 Ave | Station Crossing | DOWNTOWN | Professional Services | 2,000 |
| Givens LLP | 9928 99 AV | Station Crossing | DOWNTOWN | Professional Services | 1,000 |
| ATB Financial | 9964 99 AV | Station Crossing | DOWNTOWN | Professional Services | 5,820 |
| TD Canada Trust | 10006 99 AV | Station Square | DOWNTOWN | Professional Services | 4,848 |
| Vote Olson (Formerly Black Market Tattoo) | 9827 104 ST | Downtown 104th St | DOWNTOWN | Public Administration | 750 |
| Jessica Littlewood MLA | 9925B 104 ST | Downtown 104th Street | DOWNTOWN | Public Service | 2,000 |
| Alberta Government | 10404 99 AV | Market Square | DOWNTOWN | Public Service | 1,500 |
| Kountry Knits | 10103 100 AV | Downtown 100th Ave | DOWNTOWN | Specialty Retail | 1,765 |
| The Blu Poppie | 10206 100 AV | Downtown 100th Ave | DOWNTOWN | Specialty Retail | 629 |
| The Hair Corner | 10303 100 AV, Unit:1 | Downtown 100th Ave | DOWNTOWN | Specialty Retail | 1,176 |
| Gott the Gift Music Studio (HOME) | 9626 79 ST | Downtown 100th Ave | DOWNTOWN | Specialty Retail | 1,940 |
| Spotlight Gallery | 9809 101 ST | Downtown 101st St | DOWNTOWN | Specialty Retail | 1,494 |
| Twice But Nice Thrift Store | 9924 102 ST | Downtown 102nd St | DOWNTOWN | Specialty Retail | 4,140 |
| Native Wild | 9904 103 St | Downtown 103 St | DOWNTOWN | Specialty Retail | 700 |
| Fort Saskatchewan Bottle Depot | 9822 103 ST | Downtown 103rd St | DOWNTOWN | Specialty Retail | 4,367 |
| Daisy a Day | 9915A 103 ST | Downtown 103rd St | DOWNTOWN | Specialty Retail | 949 |
| Madison's Dog Grooming | 9829 104 ST | Downtown 104th St | DOWNTOWN | Specialty Retail | 654 |
| Country Chic Custom Designs | 9831 104 ST | Downtown 104th St | DOWNTOWN | Specialty Retail | 750 |
| Enhance It Embroidery | 10404 98 AV | Downtown 98th Ave | DOWNTOWN | Specialty Retail | 1,156 |
| Pawn Shop | 10309 99 AV | Downtown 99th Ave | DOWNTOWN | Specialty Retail | 1,219 |
| Judy's Safety Co | 10410 98 AV, Unit:409 | Fort Station | DOWNTOWN | Specialty Retail | 2,000 |
| Vacant (former K9 Play Doggy Daycare ) | 10451 99 AVE, BLDG6 | Fort Station | DOWNTOWN | VACANT | 1,500 |

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Romantic Secrets | 10470 98 AV, Unit 505 | Fort Station | DOWNTOWN | Specialty Retail | 1,000 |
| The Fort Gaming & Collectibles | 10303 100 AV, Unit:2 | Downtown 100th Ave | DOWNTOWN | Toys & Hobbies | 698 |
| Vacant (Formerly Scotiabank) | 10404 99 AV, Unit:128 | Market Square | DOWNTOWN | VACANT | 4,706 |
| Vacant Unit (Former Glenn's Music) | 9955 102 ST | Downtown 100th Ave | DOWNTOWN | VACANT | 750 |
| Vacant (former Blondes Brunettes & Redheads Salon) | 10203 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 2,169 |
| Vacant (former Denture Care Centre) | 10204A 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 627 |
| Vacant | 10204B 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 627 |
| Vacant Unit (Formerly The Downtown Diner) | 10209 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 1,084 |
| Vacant (Oil City Fries (Food Truck) for sale) | 10301 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 300 |
| Vacant (Formerly Liquor 4 You) | 10310 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 1,559 |
| Vacant 10310 B 100th Ave | 10310B 100 AV | Downtown 100th Ave | DOWNTOWN | VACANT | 1,500 |
| Vacant (beside RBC) | | Downtown 102nd St | DOWNTOWN | VACANT | 2,500 |
| Vacant | 9930 103 ST | Downtown 103rd St | DOWNTOWN | VACANT | 2,000 |
| Vacant (beside former Glenns Music Store) | | Downtown 103rd St | DOWNTOWN | VACANT | 1,000 |
| Vacant (former Glenns Music Store) | | Downtown 103rd St | DOWNTOWN | VACANT | 476 |
| Vacant unit (opposite Capital Pizza) | | Downtown 103rd St | DOWNTOWN | VACANT | 1,500 |
| Vacant (Former Coffee Shop) | 9825 104 ST | Downtown 104th St | DOWNTOWN | VACANT | 1,182 |
| Vacant (Formerly Full Range Therapy) | 9925 104 ST | Downtown 104th St | DOWNTOWN | VACANT | 1,250 |
| Vacant (9833 104th St behind Servus) | 9833 104 ST | Downtown 104th St | DOWNTOWN | VACANT | 750 |
| Vacant (9839 104th St behind Servus) | 9839 104 ST | Downtown 104th St | DOWNTOWN | VACANT | 1,000 |
| Vacant Unit (Beside Ragnarok Studios) | 10102 98 AV | Downtown 98th Ave | DOWNTOWN | VACANT | 1,000 |
| Vacant | 10208 99 AV | Downtown 99th Ave | DOWNTOWN | VACANT | 1,182 |
| Vacant Unit (Building 3 Unit 5) | 10451 99 AVE | Fort Station | DOWNTOWN | VACANT | 1,410 |
| Vacant Unit (Building 3 Unit 6) | 10451 99 AVE | Fort Station | DOWNTOWN | VACANT | 1,302 |
| Vacant Unit (Building 6 Unit 8) | 10451 99 AVE | Fort Station | DOWNTOWN | VACANT | 3,649 |
| Vacant Unit (Building 6 units 1, 2 & 3) | 10451 99 AVE | Fort Station | DOWNTOWN | VACANT | 3,092 |
| Vacant (Formetly Two Sergents Tap House) | 10470 98 AV, Unit:501 | Fort Station | DOWNTOWN | VACANT | 2,500 |
| Vacant (Formerly Solo Liquor) | 10404 99 AV, Unit:100B | Market Square | DOWNTOWN | VACANT | 1,000 |
| Vacant Restaurant | 10004 99 AV | Station Crossing | DOWNTOWN | VACANT | 1,275 |
| Vacant (Integrity Land Professional Building) | 9940 99 AV | Station Crossing | DOWNTOWN | VACANT | 900 |
| Vacant (Formerly Kinny Sweet Retreat Café) | 10201 100 AV | Downtown 110th Ave | DOWNTOWN | VACANT | 1,500 |
| Econo Liquor | 112 TOWN CREST RD, Unit:60 | Southfort | SOUTH | Alcohol & Tobacco | 2,278 |
| Cannabis House | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | Alcohol & Tobacco | 1,250 |
| Liquor Basket | 120 SOUTHRIDGE BLVD, Unit:111 | Southridge Landing Ph | SOUTH | Alcohol & Tobacco | 2,000 |
| Southfort Liquor | 121 TOWN CREST RD, Unit:101 | Town Crest Centre | SOUTH | Alcohol & Tobacco | 1,000 |
| River City Cigar Co. | 41 WESTPARK BLVD, Unit:103 | Westpark North | SOUTH | Alcohol & Tobacco | 565 |
| Westpark Beverage Liquor Store | 41 WESTPARK BLVD, Unit:104 | Westpark North | SOUTH | Alcohol & Tobacco | 1,482 |
| Liquor House | 100 WESTPARK BLVD, Unit: 104 | Westpark South | SOUTH | Alcohol & Tobacco | 3,000 |
| Lube City | 8751 84 ST | Galloway Square | SOUTH | Auto Service | 1,510 |
| Heartland Ford | 101 SOUTHRIDGE BLVD | Freestanding | SOUTH | Auto/RV/Motorsports Dealership | 24,129 |
| Kids Fort Day Care | 8741 84 ST, Unit:109 | Galloway Square | SOUTH | Child Care Services | 2,835 |
| Stepping Stone Daycare | 8761 84 ST, Unit:109 | Galloway Square | SOUTH | Child Care Services | 4,000 |
| Lil Feet Big Steps Daycare | 121 TOWN CREST RD, Unit:117/119 | Town Crest Centre | SOUTH | Child Care Services | 3,000 |
| 7-Eleven | 8775 84 ST | Galloway Square | SOUTH | Convenience Store | 2,628 |
| Shell Food Mart | 9761 90 ST | Southfort | SOUTH | Convenience Store | 1,952 |
| Esso on the Run | 140 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | Convenience Store | 2,000 |
| Husky Market | 20 WESTPARK BLVD | Westpark South | SOUTH | Convenience Store | 2,153 |
| Canadian Brewhouse | 60 WESTPARK BLVD | Westpark South | SOUTH | Drinking Establishment | 6,590 |
| Anytime Fitness | 23 WESTPARK BLVD, Unit:109 | Westpark North | SOUTH | Fitness & Leisure | 4,800 |
| Ricky's Restaurant | 8770 84 ST | Galloway Square | SOUTH | Full Service F&B | 5,095 |
| Montana's BBQ & Bar | 140 TOWN CREST RD | Southfort Inn Hotel | SOUTH | Full Service F&B | 4,500 |
| Sawmill | 21 WESTPARK BLVD | Westpark North | SOUTH | Full Service F&B | 5,389 |
| Royal Pizza | 37 WESTPARK BLVD | Westpark North | SOUTH | Full Service F&B | 3,500 |
| A-Bun Dance Bakery | 41 WESTPARK BLVD, Unit:107 | Westpark North | SOUTH | Grocery & Specialty Foods | 1,997 |
| Freson Bros Grocery | 150 WESTPARK BLVD | Westpark South | SOUTH | Grocery & Specialty Foods | 44,900 |
| Body TX Massage | 8741 84 ST, Unit:105 | Galloway Square | SOUTH | Health & Beauty | 1,075 |
| Mantra Salon Spa | 41 WESTPARK BLVD, Unit:101 | Westpark North | SOUTH | Health & Beauty | 1,100 |
| Booster Juice | 8700 84 ST | Dow Centre | SOUTH | Limited Service F&B | 255 |

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Dairy Queen Grill & Chill | 8700 84 ST | Dow Centre | SOUTH | Limited Service F&B | 500 |
| Mary Browns | 112 TOWN CREST RD, Unit:30 | South Fort | SOUTH | Limited Service F&B | 1,069 |
| Second Cup Coffee | 112 TOWN CREST RD, Unit:10 | Southfort | SOUTH | Limited Service F&B | 2,371 |
| Tim Hortons | 113-120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | Limited Service F&B | 2,500 |
| Red Swan Pizza | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | Limited Service F&B | 1,000 |
| Pizza Donair | 121 TOWN CREST RD | Town Crest Centre | SOUTH | Limited Service F&B | 915 |
| Tummy Full | 121 TOWN CREST RD | Town Crest Centre | SOUTH | Limited Service F&B | 1,200 |
| Wok n'go | 41 WESTPARK BLVD, Unit:106 | Westpark North | SOUTH | Limited Service F&B | 987 |
| Tim Hortons | 30 WESTPARK BLVD | Westpark South | SOUTH | Limited Service F&B | 2,500 |
| Wendy's | 40 WESTPARK BLVD | Westpark South | SOUTH | Limited Service F&B | 3,220 |
| Fabutan | 8741 84 ST, Unit:101 | Galloway Square | SOUTH | Personal Services | 1,080 |
| Concrete Blonde | 121 TOWN CREST RD, Unit:111 | Town Crest Centre | SOUTH | Personal Services | 1,000 |
| Concrete Barbers | 121 TOWN CREST RD, Unit:9 | Town Crest Centre | SOUTH | Personal Services | 1,000 |
| Adore Nails Spa | 103 WESTPARK BLVD #108 | Westpark South | SOUTH | Personal Services | 2,000 |
| West Park Nail Salon | 150 WESTPARK BLVD, Unit:3 | Westpark South | SOUTH | Personal Services | 1,177 |
| Rexall | 116 TOWN CREST RD | Southfort | SOUTH | Pharmacy | 9,732 |
| AbEx Pharmacy | 121 TOWN CREST RD, Unit:102 | Town Crest Centre | SOUTH | Pharmacy | 1,000 |
| Shoppers Drug Mart | 100 WESTPARK BLVD | Westpark South | SOUTH | Pharmacy | 18,000 |
| Registries Farnese Insurance | 117 TOWN CREST RD, Unit:101 | Southfort Town Centre | SOUTH | Professional Services | 3,000 |
| Cameron Dental | 117 TOWN CREST RD, Unit:105 | Southfort Town Centre | SOUTH | Professional Services | 3,000 |
| Southfort Vet | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | Professional Services | 1,000 |
| Cameron Dental | 150 WESTPARK BLVD #102 - #104 | Westpark South | SOUTH | Professional Services | 2,300 |
| Gym Rat | 8761 84 St Unit 101 | Galloway Square | SOUTH | Specialty Retail | 900 |
| Telus/Koodo | 112 TOWN CREST RD, Unit:40 | Southfort | SOUTH | Specialty Retail | 1,069 |
| Funky Petals | 41 WESTPARK BLVD, Unit:105 | Westpark North | SOUTH | Specialty Retail | 1,132 |
| Pet Planet | 150 WESTPARK BLVD #106 | Westpark South | SOUTH | Specialty Retail | 1,200 |
| Vacant (former Eclipse Health & Fitness) | 8761 84 ST, Unit:101 | Galloway Square | SOUTH | VACANT | 1,726 |
| Vacant Unit 101 | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | VACANT | 1,250 |
| Vacant Unit 102/104 with Drive Thru | 121 TOWN CREST RD | Town Crest Centre | SOUTH | VACANT | 3,667 |
| Vacant Unit 103 | 121 TOWN CREST RD | Town Crest Centre | SOUTH | VACANT | 1,200 |
| Vacant Unit 104 | 121 TOWN CREST RD | Town Crest Centre | SOUTH | VACANT | 1,200 |
| Vacant Unit 113 | 121 TOWN CREST RD | Town Crest Centre | SOUTH | VACANT | 1,200 |
| Vacant Unit 121 | 121 TOWN CREST RD | Town Crest Centre | SOUTH | VACANT | 1,200 |
| Vacant Unit 102 (former Planet Beach) | 41 WESTPARK BLVD | Westpark North | SOUTH | VACANT | 971 |
| Coming Soon Multi-Tenant Building B | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | VACANT NEW | 14,400 |
| Coming Soon Multi-Tenant Building C | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | VACANT NEW | 18,700 |
| Coming Soon Multi-Tenant Building D | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | VACANT NEW | 5,487 |
| Coming Soon Multi-Tenant Building E | 120 SOUTHRIDGE BLVD | Southridge Landing Ph | SOUTH | VACANT NEW | 6,000 |
| VACANT (new CRU Leasing) | 41 WESTPARK BLVD | Westpark North | SOUTH | VACANT NEW | 7,200 |
| Burger King | 31 WESTPARK BLVD, Unit:101 | Westpark North | SOUTH | Limited Service F&B | 2,400 |
| Taste of Mediterranean | 31 WESTPARK BLVD, Unit:103 | Westpark North | SOUTH | Limited Service F&B | 2,500 |
| CRU | 103 WESTPARK BLVD #104 | Westpark South | SOUTH | VACANT NEW | 2,000 |
| CRU | 103 WESTPARK BLVD #110 | Westpark South | SOUTH | VACANT NEW | 1,000 |
| CRU | 150 WESTPARK BLVD #108 - #110 | Westpark South | SOUTH | VACANT NEW | 1,700 |
| Pineview Liquor Store | 9902 93 ST, Unit:6 | Riverpointe Plaza | WEST | Alcohol & Tobacco | 2,357 |
| Angie's Liquor | 9709 90 ST | Westview | WEST | Alcohol & Tobacco | 1,546 |
| Smoking Barrels | 9749 90 ST | Westview | WEST | Alcohol & Tobacco | 1,527 |
| Westview Daycare | 9745 90 ST | Westview | WEST | Child Care Services | 3,000 |
| Shell Select C-Store | 110 TOWN CREST RD | Westview | WEST | Convenience Store | 1,119 |
| 7-Eleven | 7802 95A AV | Westview | WEST | Convenience Store | 3,023 |
| Rainbow Restaurant | 9721 90 ST | Westview | WEST | Full Service F&B | 3,818 |
| Retreat Salon and Spa | 9902 93 ST, Unit:3 | Riverpointe Plaza | WEST | Health & Beauty | 2,524 |
| Casilda Beauty Supplies | 9757 90 ST | Westview | WEST | Health & Beauty | 1,000 |
| Panago | 9902 93 ST, Unit:4 | Riverpointe Plaza | WEST | Limited Service F&B | 1,299 |
| Buster's Pizza Donair | 9753 90 ST | Westview | WEST | Limited Service F&B | 1,584 |
| Urban Dog Spaw | 9902 93 ST, Unit:5 | Riverpointe Plaza | WEST | Personal Services | 1,238 |
| Barber Shop | 10401B 100 AV | Westview | WEST | Personal Services | 750 |
| Pure Yoga Studio | 9701 90 ST | Westview | WEST | Personal Services | 2,500 |



CITY OF FORT SASKATCHEWAN

| Retail Business Name | Legal Address/Owner | Node | Retail Cluster | General Retail Category | Est. Area (SF) |
|---|---|---|---|---|---|
| Tantalize Tanning | 9737 90 ST | Westview | WEST | Personal Services | 1,527 |
| Lusty Nails & Spa (was Star Nails) | 9751 90 ST | Westview | WEST | Personal Services | 750 |
| Fort Gymnastics (opening fall 2019) | 9419 94 AV | Square One | WEST | Arts & Entertainment | 6,000 |
| The Medicine Shoppe | 9421 94 AV | Square One | WEST | Pharmacy | 1,200 |
| Rexall | 9425 94 AV | Square One | WEST | Pharmacy | 500 |
| Daycare (former MAC's Convenience) | 9902 93 ST | Riverpointe Plaza | WEST | Professional Services | 2,603 |
| Grace Dental | 9902 93 ST, Unit:1 | Riverpointe Plaza | WEST | Professional Services | 1,500 |
| Career & Employment Centre | 9902 93 ST, UNIT:2 | Riverpointe Plaza | WEST | Professional Services | 1,226 |
| Westview Medical Clinic | 9757 90 ST | Westview | WEST | Professional Services | 1,527 |
| Master Cleaner | 9705 90 ST | Westview | WEST | Specialty Retail | 955 |
| Vacant Unit #2) | 9902 93 ST | Riverpointe Plaza | WEST | VACANT | 1,446 |

# B CONSUMER SURVEY FULL RESPONSES RAW DATA ALL RESPONDENTS

2019 FORT SASKATCHEWANCONSUMERSURVEY

### INTERVIEW LOCATION

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | DOW CENTENNIAL CENTRE | 101 | 50.5 | 50.5 | 50.5 |
| | CORNERSTONE CENTRE | 49 | 24.5 | 24.5 | 75.0 |
| | DOWNTOWN FS | 50 | 25.0 | 25.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### CITY RESPONDENT RESIDES

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | PART TIME RESIDENT | 1 | .5 | .5 | .5 |
| | CITY OF FT SASKATCHEWAN | 145 | 72.5 | 72.5 | 73.0 |
| | STURGEON COUNTY | 9 | 4.5 | 4.5 | 77.5 |
| | GIBBONS | 4 | 2.0 | 2.0 | 79.5 |
| | SHERWOOD PARK | 4 | 2.0 | 2.0 | 81.5 |
| | STRATHCONA COUNTY | 15 | 7.5 | 7.5 | 89.0 |
| | OTHER | 22 | 11.0 | 11.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### Q1A. PRIMARY CONVENIENCE SHOPPING CENTER

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | NO CONVENIENCE PRIMARY | 14 | 7.0 | 7.0 | 7.0 |
| | DOWNTOWN FS | 30 | 15.0 | 15.0 | 22.0 |
| | CORNERSTONE CENTRE | 97 | 48.5 | 48.5 | 70.5 |
| | COSTCO NE EDM | 2 | 1.0 | 1.0 | 71.5 |
| | NO FRILLS | 32 | 16.0 | 16.0 | 87.5 |
| | WESTPARK SOUTHFORT | 9 | 4.5 | 4.5 | 92.0 |
| | OTHER SC | 16 | 8.0 | 8.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

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CITY OF FORT SASKATCHEWAN

2019 FORT SASKATCHEWANCONSUMERSURVEY

**$Q1B Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q1B. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response[a] | CLOSE TO HOME | 50 | 12.6% | 25.0% |
| | CLOSE WORK HOTEL | 5 | 1.3% | 2.5% |
| | PRICES | 82 | 20.7% | 41.0% |
| | ONE STOP SHOP | 24 | 6.1% | 12.0% |
| | NOT CROWDED | 4 | 1.0% | 2.0% |
| | FAMILIARITY | 22 | 5.6% | 11.0% |
| | PARKING | 4 | 1.0% | 2.0% |
| | CUSTOMER SERVICE | 16 | 4.0% | 8.0% |
| | SALES PROMOS | 32 | 8.1% | 16.0% |
| | BUY IN BULK | 7 | 1.8% | 3.5% |
| | SUPPORT LOCAL | 8 | 2.0% | 4.0% |
| | SELECTION PRODUCTS | 30 | 7.6% | 15.0% |
| | SELECTION STORES | 3 | 0.8% | 1.5% |
| | SHOP SPECIFIC STORE | 31 | 7.8% | 15.5% |
| | SPECIFIC ITEM BRAND | 16 | 4.0% | 8.0% |
| | IN THE AREA | 4 | 1.0% | 2.0% |
| | QUALITY PRODUCTS | 30 | 7.6% | 15.0% |
| | MEETS NEEDS | 6 | 1.5% | 3.0% |
| | PROXIMITY OTHER AREAS | 3 | 0.8% | 1.5% |
| | QUALITY STORES | 3 | 0.8% | 1.5% |
| | EASY ACCESS | 15 | 3.8% | 7.5% |
| | NO TAXES | 1 | 0.3% | 0.5% |
| Total | | 396 | 100.0% | 198.0% |

a. Group

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CITY OF FORT SASKATCHEWAN

2019 FORT SASKATCHEWANCONSUMERSURVEY

### Q2A. PRIMARY COMPARISON SHOPPING CENTER

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | NO COMPARISON PRIMARY | 27 | 13.5 | 13.5 | 13.5 |
| | DOWNTOWN FS | 14 | 7.0 | 7.0 | 20.5 |
| | CORNERSTONE CENTRE | 58 | 29.0 | 29.0 | 49.5 |
| | SOUTHPOINTE | 7 | 3.5 | 3.5 | 53.0 |
| | COSTCO NE EDM | 1 | .5 | .5 | 53.5 |
| | WESTPARK SOUTHFORT | 1 | .5 | .5 | 54.0 |
| | EMERALD HILLS | 36 | 18.0 | 18.0 | 72.0 |
| | SHERWOOD PARK MALL | 7 | 3.5 | 3.5 | 75.5 |
| | OTHER SC | 49 | 24.5 | 24.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### $Q2B Frequencies

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q2B. MAIN REASONS SHOP PRIMARY COMPARISON SC - Multiple Response[a] | CLOSE TO HOME | 34 | 8.7% | 17.3% |
| | CLOSE WORK HOTEL | 9 | 2.3% | 4.6% |
| | PRICES | 42 | 10.8% | 21.3% |
| | ONE STOP SHOP | 25 | 6.4% | 12.7% |
| | NOT CROWDED | 2 | 0.5% | 1.0% |
| | FAMILIARITY | 8 | 2.1% | 4.1% |
| | PARKING | 2 | 0.5% | 1.0% |
| | CUSTOMER SERVICE | 10 | 2.6% | 5.1% |
| | SALES PROMOS | 15 | 3.8% | 7.6% |
| | BUY IN BULK | 5 | 1.3% | 2.5% |
| | SUPPORT LOCAL | 3 | 0.8% | 1.5% |
| | SELECTION PRODUCTS | 29 | 7.4% | 14.7% |
| | SELECTION STORES | 42 | 10.8% | 21.3% |
| | SHOP SPECIFIC STORE | 45 | 11.5% | 22.8% |
| | SPECIFIC ITEM BRAND | 20 | 5.1% | 10.2% |
| | IN THE AREA | 10 | 2.6% | 5.1% |

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CITY OF FORT SASKATCHEWAN

**$Q2B Frequencies**

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| | QUALITY PRODUCTS | 12 | 3.1% | 6.1% |
| | COMPARISON ITEMS | 1 | 0.3% | 0.5% |
| | CLOTHING | 30 | 7.7% | 15.2% |
| | SHOES | 1 | 0.3% | 0.5% |
| | MEETS NEEDS | 25 | 6.4% | 12.7% |
| | PROXIMITY OTHER AREAS | 4 | 1.0% | 2.0% |
| | QUALITY STORES | 2 | 0.5% | 1.0% |
| | EASY ACCESS | 14 | 3.6% | 7.1% |
| Total | | 390 | 100.0% | 198.0% |

a. Group

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q3A. % SPEND ON GROCERY BAKERY DELI FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 15272 | 76.36 |
| Q3B. % SPEND ON GROCERY BAKERY DELI OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 4638 | 23.19 |
| Q3C. % SPEND ON GROCERY BAKERY DELI ONLINE PAST 3 MONTHS | 200 | 0 | 90 | 90 | .45 |
| Q3D. IMPORTANCE RATING ADD GROCERY BAKERY DELI TO FT SASKATCHEWAN | 200 | 1 | 10 | 863 | 4.31 |

2019 FORT SASKATCHEWANCONSUMERSURVEY

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q4A. % SPEND ON PHARMACY HEALTHCARE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 15723 | 78.61 |
| Q4B. % SPEND ON PHARMACY HEALTHCARE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 3907 | 19.53 |
| Q4C. % SPEND ON PHARMACY HEALTHCARE ONLINE PAST 3 MONTHS | 200 | 0 | 50 | 70 | .35 |
| Q4D. IMPORTANCE RATING ADD PHARMACY HEALTHCARE TO FT SASKATCHEWAN | 200 | 1 | 10 | 513 | 2.57 |
| Q5A. % SPEND ON PERSONAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 11700 | 58.50 |
| Q5B. % SPEND ON PERSONAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 5185 | 25.92 |
| Q5C. % SPEND ON PERSONAL SERVICES ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 415 | 2.08 |
| Q5D. IMPORTANCE RATING ADD PERSONAL SERVICES TO FT SASKATCHEWAN | 197 | 1 | 10 | 524 | 2.66 |

2019 FORT SASKATCHEWANCONSUMERSURVEY

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q6A. % SPEND ON ALCOHOL TOBACCO FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 11490 | 57.45 |
| Q6B. % SPEND ON ALCOHOL TOBACCO OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 2325 | 11.63 |
| Q6C. % SPEND ON ALCOHOL TOBACCO ONLINE PAST 3 MONTHS | 200 | 0 | 50 | 85 | .43 |
| Q6D. IMPORTANCE RATING ADD ALCOHOL TOBACCO TO FT SASKATCHEWAN | 200 | 1 | 10 | 247 | 1.23 |
| Q7A. % SPEND ON CLOTHING FOOTWEAR FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 5510 | 27.55 |
| Q7B. % SPEND ON CLOTHING FOOTWEAR OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 12485 | 62.42 |
| Q7C. % SPEND ON CLOTHING FOOTWEAR ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 1805 | 9.03 |
| Q7D. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO FT SASKATCHEWAN | 200 | 1 | 10 | 1435 | 7.17 |
| Q8A. % SPEND ON JEWELRY ACCESSORIES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 3285 | 16.43 |

2019 FORT SASKATCHEWANCONSUMERSURVEY

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q8B. % SPEND ON JEWELRY ACCESSORIES FT SASKATCH9EWAN PAST 3 MONTHS | 200 | 0 | 100 | 5080 | 25.40 |
| Q8C. % SPEND ON JEWELRY ACCESSORIES ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 1135 | 5.68 |
| Q8D. IMPORTANCE RATING ADD JEWELRY ACCESSORIES TO FT SASKATCHEWAN | 198 | 1 | 10 | 527 | 2.66 |
| Q9A. % SPEND ON HEALTH BEAUTY CARE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 13545 | 67.73 |
| Q9B. % SPEND ON HEALTH BEAUTY CARE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 3775 | 18.87 |
| Q9C. % SPEND ON HEALTH BEAUTY CARE ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 980 | 4.90 |
| Q9D. IMPORTANCE RATING ADD HEALTH BEAUTY CARE TO FT SASKATCHEWAN | 199 | 1 | 10 | 490 | 2.46 |
| Q10A. % SPEND ON HOME FURNITURE DECOR FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 4501 | 22.51 |
| Q10B. % SPEND ON HOME FURNITURE DECOR OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 9219 | 46.09 |

2019 FORT SASKATCHEWANCONSUMERSURVEY

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q10C. % SPEND ON HOME FURNITURE DECOR ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 1180 | 5.90 |
| Q10D. IMPORTANCE RATING ADD ON HOME FURNITURE DECOR TO FT SASKATCHEWAN | 196 | 1 | 10 | 889 | 4.54 |
| Q11A. % SPEND ON ELECTRONICS COMPUTERS FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 4975 | 24.87 |
| Q11B. % SPEND ON ELECTRONICS COMPUTERS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 8761 | 43.81 |
| Q11C. % SPEND ON ELECTRONICS COMPUTERS ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 2164 | 10.82 |
| Q11D. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO FT SASKATCHEWAN | 198 | 1 | 10 | 815 | 4.12 |
| Q12A. % SPEND ON HOME IMPROVEMENT GARDEN FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 12725 | 63.62 |
| Q12B. % SPEND ON HOME IMPROVEMENT GARDEN OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 4235 | 21.18 |

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q12C. % SPEND ON HOME IMPROVEMENT GARDEN ONLINE PAST 3 MONTHS | 200 | 0 | 40 | 40 | .20 |
| Q12D. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO FT SASKATCHEWAN | 199 | 1 | 10 | 722 | 3.63 |
| Q13A. % SPEND ON BOOKS MUSIC FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 1390 | 6.95 |
| Q13B. % SPEND ON BOOKS MUSIC OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 5480 | 27.40 |
| Q13C. % SPEND ON BOOKS MUSIC ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 8530 | 42.65 |
| Q13D. IMPORTANCE RATING ADD BOOKS MUSIC TO FT SASKATCHEWAN | 199 | 1 | 10 | 819 | 4.12 |
| Q14A. % SPEND ON SPORTING GOODS TOYS HOBBIES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 6435 | 32.17 |
| Q14B. % SPEND ON SPORTING GOODS TOYS HOBBIES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 8635 | 43.18 |
| Q14C. % SPEND ON SPORTING GOODS TOYS HOBBIES ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 1130 | 5.65 |

2019 FORT SASKATCHEWANCONSUMERSURVEY

**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q14D. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES TO FT SASKATCHEWAN | 197 | 1 | 10 | 985 | 5.00 |
| Q15A. % SPEND ON SPECIALTY RETAIL FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 5060 | 25.30 |
| Q15B. % SPEND ON SPECIALTY RETAIL OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 5965 | 29.83 |
| Q15C. % SPEND ON SPECIALTY RETAIL ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 1175 | 5.87 |
| Q15D. IMPORTANCE RATING ADD SPECIALTY RETAIL TO FT SASKATCHEWAN | 198 | 1 | 10 | 776 | 3.92 |
| Q16A. % SPEND ON COFFEE CAFE FAST FOOD FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 14595 | 72.98 |
| Q16B. % SPEND ON COFFEE CAFE FAST FOOD OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 4405 | 22.03 |
| Q16C. % SPEND ON COFFEE CAFE FAST FOOD ONLINE PAST 3 MONTHS | 200 | 0 | 0 | 0 | .00 |
| Q16D. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO FT SASKATCHEWAN | 200 | 1 | 10 | 638 | 3.19 |

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**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q17A. % SPEND ON FULL SERVICE RESTAURANTS FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 9625 | 48.13 |
| Q17B. % SPEND ON FULL SERVICE RESTAURANTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 9475 | 47.37 |
| Q17C. % SPEND ON FULL SERVICE RESTAURANTS ONLINE PAST 3 MONTHS | 200 | 0 | 0 | 0 | .00 |
| Q17D. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO FT SASKATCHEWAN | 199 | 1 | 10 | 1148 | 5.77 |
| Q18A. % SPEND ON FITNESS CLUB DAY SPA FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 10965 | 54.83 |
| Q18B. % SPEND ON FITNESS CLUB DAY SPA OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 1685 | 8.43 |
| Q18C. % SPEND ON FITNESS CLUB DAY SPA ONLINE PAST 3 MONTHS | 200 | 0 | 50 | 50 | .25 |
| Q18D. IMPORTANCE RATING ADD FITNESS CLUB DAY SPA TO FT SASKATCHEWAN | 197 | 1 | 10 | 450 | 2.28 |

2019 FORT SASKATCHEWANCONSUMERSURVEY

### Descriptive Statistics

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q19A. % SPEND ON ENTERTAINMENT FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 6488 | 32.44 |
| Q19B. % SPEND ON ENTERTAINMENT OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 9358 | 46.79 |
| Q19C. % SPEND ON ENTERTAINMENT ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 454 | 2.27 |
| Q19D. IMPORTANCE RATING ADD ENTERTAINMENT TO FT SASKATCHEWAN | 200 | 1 | 10 | 924 | 4.62 |
| Q20A. % SPEND ON AUTO RECREATIONAL VEHICLES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 3325 | 16.63 |
| Q20B. % SPEND ON AUTO RECREATIONAL VEHICLES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 7845 | 39.23 |
| Q20C. % SPEND ON AUTO RECREATIONAL VEHICLES ONLINE PAST 3 MONTHS | 200 | 0 | 80 | 130 | .65 |
| Q20D. IMPORTANCE RATING ADD AUTO RECREATIONAL VEHICLES TO FT SASKATCHEWAN | 200 | 1 | 10 | 456 | 2.28 |

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**Descriptive Statistics**

| | N | Minimum | Maximum | Sum | Mean |
|---|---|---|---|---|---|
| Q20xA. % SPEND ON AUTO PARTS ACCESSORIES FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 9430 | 47.15 |
| Q20xB. % SPEND ON AUTO PARTS ACCESSORIES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS | 200 | 0 | 100 | 6065 | 30.32 |
| Q20xC. % SPEND ON AUTO PARTS ACCESSORIES ONLINE PAST 3 MONTHS | 200 | 0 | 100 | 605 | 3.03 |
| Q20xD. IMPORTANCE RATING ADD AUTO PARTS ACCESSORIES TO FT SASKATCHEWAN | 200 | 1 | 10 | 453 | 2.27 |
| Valid N (listwise) | 187 | | | | |

**Q21. FREQ VISIT DT FT SASKATCHEWAN**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | DAILY | 30 | 15.0 | 15.0 | 15.0 |
| | WEEKLY | 59 | 29.5 | 29.5 | 44.5 |
| | MONTHLY | 77 | 38.5 | 38.5 | 83.0 |
| | YEARLY | 24 | 12.0 | 12.0 | 95.0 |
| | NEVER | 10 | 5.0 | 5.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

2019 FORT SASKATCHEWANCONSUMERSURVEY

### $Q21A Frequencies

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| Q21A. REASON VISIT DT FT SASKATCHEWAN YEARLY OR LESS - Multiple Response[a] | NO SPECIFIC REASONS | 1 | 2.9% | 3.1% |
| | INFREQUENT VISIT TO STORES | 1 | 2.9% | 3.1% |
| | PARKING | 1 | 2.9% | 3.1% |
| | SPECIFIC STORES RESTAURANT IS GONE | 1 | 2.9% | 3.1% |
| | GO DT PERSONAL SERVICES | 1 | 2.9% | 3.1% |
| | GO DT FOR RESTAURANTS | 1 | 2.9% | 3.1% |
| | GO DT FARMERS MARKET | 2 | 5.9% | 6.3% |
| | NOTHING I NEED DT | 22 | 64.7% | 68.8% |
| | PREFER ONE STOP SHOP | 1 | 2.9% | 3.1% |
| | HOURS OPERATION | 1 | 2.9% | 3.1% |
| | FEEL UNSAFE DT | 1 | 2.9% | 3.1% |
| | DAY OUT TO BROSWE | 1 | 2.9% | 3.1% |
| Total | | 34 | 100.0% | 106.3% |

a. Group

### Q22 TIME SPEND IN DOWNTOWN FT SASKATCHEWAN

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | LESS THAN 1 HOUR | 73 | 36.5 | 36.5 | 36.5 |
| | 1-2 HOURS | 97 | 48.5 | 48.5 | 85.0 |
| | 2-3 HOURS | 21 | 10.5 | 10.5 | 95.5 |
| | MORE THAN 3 HOURS | 9 | 4.5 | 4.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

**Q23 PRIMARY REASON VISIT DOWNTOWN FT SASKATCHEWAN**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | ENTERTAINMENT | 10 | 5.0 | 5.1 | 5.1 |
| | DINING | 29 | 14.5 | 14.6 | 19.7 |
| | SHOPPING | 64 | 32.0 | 32.3 | 52.0 |
| | WALK BROWSE | 33 | 16.5 | 16.7 | 68.7 |
| | WORK | 9 | 4.5 | 4.5 | 73.2 |
| | SERVICE | 53 | 26.5 | 26.8 | 100.0 |
| | Total | 198 | 99.0 | 100.0 | |
| Missing | System | 2 | 1.0 | | |
| Total | | 200 | 100.0 | | |

**$Q24 Frequencies**

| | | Responses | | Percent of Cases |
|---|---|---|---|---|
| | | N | Percent | |
| Q24. LIKE MOST ABOUT SHOPPING OPPORTUNITES IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 20 | 5.4% | 10.0% |
| | CLOSE TO HOME | 63 | 17.1% | 31.5% |
| | PRICES SALES PROMOS | 14 | 3.8% | 7.0% |
| | ONE STOP SHOP | 4 | 1.1% | 2.0% |
| | NOT CROWDED | 7 | 1.9% | 3.5% |
| | MEETS NEEDS | 56 | 15.2% | 28.0% |
| | PARKING TRAFFIC | 12 | 3.3% | 6.0% |
| | CUSTOMER SERVICE | 15 | 4.1% | 7.5% |
| | EASY ACCESS | 24 | 6.5% | 12.0% |
| | SELECTION STORES | 30 | 8.2% | 15.0% |
| | SELECTION RESTAURANTS | 4 | 1.1% | 2.0% |
| | LIKE SPECIFIC STORE | 34 | 9.2% | 17.0% |
| | PROFESSIONAL PERSONAL SERVICES | 5 | 1.4% | 2.5% |
| | IN STOCK | 1 | 0.3% | 0.5% |
| | PROXIMITY OTHER AREAS | 13 | 3.5% | 6.5% |
| | SUPPORT LOCAL | 20 | 5.4% | 10.0% |
| | FAMILIARITY | 3 | 0.8% | 1.5% |

2019 FORT SASKATCHEWANCONSUMERSURVEY

**$Q24 Frequencies**

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| | QUALITY STORES | 6 | 1.6% | 3.0% |
| | LIKE NEW STORES | 2 | 0.5% | 1.0% |
| | ENTERTAINMENT | 2 | 0.5% | 1.0% |
| | DOWNTOWN FS | 10 | 2.7% | 5.0% |
| | GREENSPACE | 2 | 0.5% | 1.0% |
| | SMALL TOWN | 14 | 3.8% | 7.0% |
| | ATTRACTIONS | 2 | 0.5% | 1.0% |
| | FARMERS MARKET | 5 | 1.4% | 2.5% |
| Total | | 368 | 100.0% | 184.0% |

a. Group

**$Q25 Frequencies**

| | | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|---|
| Q25. STORES SERVICES INCREASE SPENDING IN FT SASKATCHEWAN - Multiple Response[a] | NOTHING SPECIFIC | 12 | 2.6% | 6.1% |
| | DEPT STORE | 14 | 3.0% | 7.1% |
| | WINNERS | 23 | 4.9% | 11.6% |
| | CLOTHING FOOTWEAR | 58 | 12.4% | 29.3% |
| | BOOKS MUSIC DVD | 31 | 6.6% | 15.7% |
| | ELECTRONICS COMPUTERS | 9 | 1.9% | 4.5% |
| | FURNISHINGS APPLIANCES | 13 | 2.8% | 6.6% |
| | SPORTING GOODS | 19 | 4.1% | 9.6% |
| | SPECIALTY RETAIL | 30 | 6.4% | 15.2% |
| | GROCERY DRUGSTORE | 19 | 4.1% | 9.6% |
| | HOME IMPROVEMENT GARDEN | 5 | 1.1% | 2.5% |
| | AUTOMOTIVE | 11 | 2.4% | 5.6% |
| | PERSONAL SERVICES | 5 | 1.1% | 2.5% |
| | PROFESSIONAL FINANCIAL SERVICES | 9 | 1.9% | 4.5% |
| | FITNESS CLUB DAY SPA | 23 | 4.9% | 11.6% |

2019 FORT SASKATCHEWANCONSUMERSURVEY

## $Q25 Frequencies

| | Responses N | Responses Percent | Percent of Cases |
|---|---|---|---|
| COFFEE CAFES FAST FOOD | 19 | 4.1% | 9.6% |
| FULL SERVICE RESTAURANTS | 61 | 13.0% | 30.8% |
| ENTERTAINMENT | 37 | 7.9% | 18.7% |
| A MALL | 8 | 1.7% | 4.0% |
| TOYS HOBBIES CRAFTS | 18 | 3.8% | 9.1% |
| COSTCO | 38 | 8.1% | 19.2% |
| TRANSIT | 4 | 0.9% | 2.0% |
| LOWER PRICES | 2 | 0.4% | 1.0% |
| Total | 468 | 100.0% | 236.4% |

a. Group

## Statistics

| | | D1. HOUSEHOLD SIZE | D2. # HOUSEHOLD < 18 YEARS OLD |
|---|---|---|---|
| N | Valid | 200 | 200 |
| | Missing | 0 | 0 |
| Mean | | 2.82 | .73 |

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CITY OF FORT SASKATCHEWAN

**D1. HOUSEHOLD SIZE**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 1 | 39 | 19.5 | 19.5 | 19.5 |
| | 2 | 66 | 33.0 | 33.0 | 52.5 |
| | 3 | 30 | 15.0 | 15.0 | 67.5 |
| | 4 | 42 | 21.0 | 21.0 | 88.5 |
| | 5 | 13 | 6.5 | 6.5 | 95.0 |
| | 6 | 4 | 2.0 | 2.0 | 97.0 |
| | 7 | 3 | 1.5 | 1.5 | 98.5 |
| | 8 | 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 | 127 | 63.5 | 63.5 | 63.5 |
| | 1 | 22 | 11.0 | 11.0 | 74.5 |
| | 2 | 38 | 19.0 | 19.0 | 93.5 |
| | 3 | 8 | 4.0 | 4.0 | 97.5 |
| | 4 | 3 | 1.5 | 1.5 | 99.0 |
| | 6 | 2 | 1.0 | 1.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

**D3. RESPONDENT AGE**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 18-24 | 12 | 6.0 | 6.0 | 6.0 |
| | 25-34 | 41 | 20.5 | 20.5 | 26.5 |
| | 35-44 | 37 | 18.5 | 18.5 | 45.0 |
| | 45-54 | 22 | 11.0 | 11.0 | 56.0 |
| | 55-64 | 40 | 20.0 | 20.0 | 76.0 |
| | 65-74 | 33 | 16.5 | 16.5 | 92.5 |
| | 75+ | 15 | 7.5 | 7.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

2019 FORT SASKATCHEWANCONSUMERSURVEY

### 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 | 6 | 3.0 | 3.0 | 13.5 |
| | $25,000-$34,999 | 6 | 3.0 | 3.0 | 16.5 |
| | $35,000-$44,999 | 10 | 5.0 | 5.0 | 21.5 |
| | $45,000-$54,999 | 16 | 8.0 | 8.0 | 29.5 |
| | $55,000-$64,999 | 13 | 6.5 | 6.5 | 36.0 |
| | $65,000-$74,999 | 20 | 10.0 | 10.0 | 46.0 |
| | $75,000-$99,999 | 24 | 12.0 | 12.0 | 58.0 |
| | $100,000-$124,999 | 35 | 17.5 | 17.5 | 75.5 |
| | $125,000+ | 49 | 24.5 | 24.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### D5. RESPONDENT GENDER

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | MALE | 62 | 31.0 | 31.0 | 31.0 |
| | FEMALE | 138 | 69.0 | 69.0 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

### DAY OF INTERVIEW

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | TUE MAY 7 | 40 | 20.0 | 20.0 | 20.0 |
| | WED MAY 8 | 40 | 20.0 | 20.0 | 40.0 |
| | THU MAY 9 | 41 | 20.5 | 20.5 | 60.5 |
| | FRI MAY 10 | 42 | 21.0 | 21.0 | 81.5 |
| | SAT MAY 11 | 37 | 18.5 | 18.5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

**TIME OF INTERVIEW**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | MORNING | 76 | 38.0 | 38.0 | 38.0 |
| | AFTERNOON | 123 | 61.5 | 61.5 | 99.5 |
| | EVENING | 1 | .5 | .5 | 100.0 |
| | Total | 200 | 100.0 | 100.0 | |

# C DOWNTOWN STAKEHOLDER INTERVIEW SUMMARIES

## Fort Saskatchewan Stakeholder Interviews

### **Interview 1 |** Fort Lanes Bowling – Jonathan Jacobs, Owner

- He believes the downtown core is the area surrounding City Hall and his bowling alley
- Bowling is a downtown entertainment destination
- Slumping business, leagues are strong, weekend sales down 35%
- He felt the impact of Downton Diner closing
- He doesn't see anyone working together to help the downtown and thinks this is important
- Need for a more refined, functional BIA with one person in charge
- Needs to be a real plan with a real leader
- Currently people come downtown for one reason and then leave, no social gathering spot
- Thinks that some city policies have destroyed downtown
- Street festival was a good idea that ultimately failed
- What's missing downtown is franchises such as Starbucks
- He sees the Canadian Brewhouse taking business away from downtown
- Poor walkability downtown
- His customer base primarily comes from Fort Saskatchewan
- New developments taking away from his business, such as the golf simulator issue

### **Interview 2 |** Oakwood Developments / Washland – Wayne Land, Owner

- Began by talking about crime being an issue and his laundromat being broken into
- He is the owner of the building
- Minimal demand from residents
- Originally strong demand from oil workers, but that has shrunk a lot
- He questioned what the next big magnet will be to attract people back downtown
- Also thinks that the downtown is a nice place for boutique retailers, artsy stuff like St. Albert
- Needs to be substantial redevelopment downtown to attract more population
- Discussed the desire for a nice local coffee shop
- Potential for creative leasing process

### **Interview 3 |** The Blu Poppie – Tina Prins, Owner

- Construction during streetscape upgrades slowed her business
- Her customers come from all over including surrounding areas
- Closure of Downtown Diner hurt her sales
- She said that the July 1st Canada Day festival is amazing
    - Should be similar events at other times throughout the year
    - Winter parade
    - "Fort Fest"
    - Effective BIA is needed
- Rental rates downtown at around $25/sf which she couldn't afford
    - Wouldn't be able to survive if she didn't own the building
    - High lease rates providing no reason for new businesses to located downtown
- Brought up the idea of fines for units/land remaining vacant for too long
- The café by City Hall struggled due to poor design, inconsistent hours



City of Fort Saskatchewan

- She thinks that the downtown needs a brand “Historical Downtown”
  - Could include signage along the highway with a directory of the businesses downtown
- How about a Fort Saskatchewan app
- She said that she isn’t willing to pay $100 for a permit to have chairs on the sidewalk. It’s not about the money, but it’s about the principle after she lost money when the city upgraded the sidewalks.

**Interview 4 |** MOD Kitchen – Ken Bergmann, Owner

- Was first located in the industrial park and recently moved downtown because he was looking for retail spaces as well.
- Eastgate was too expensive and units too large
- Generally hard to find affordable leases ($1,500/month for 1,000 sf)
- Happy with his move, no complaints, he doesn’t rely on traffic
- 75% of customer base in Fort Saskatchewan, starting to grow into Edmonton
- Mentioned closer of Downton Diner as a huge issue
- Sees the potential for downtown to be a great foodie destination
- Jewellers doing well
- Funky Mango truck in the spring/summer
- Bears Den doing well
- Thinks that poor signage and unattractive store frontages are major issues downtown
- Big potential for a coffee shop
- Also sees a lack of high-end clothing
- Important to form a strong BIA
- Additional thoughts from his email:
  - Thanks for stopping by the showroom today! I had a thought after you left, and this is in regard to something that the City can do to support the downtown. There has been a lot of resistance from the locals to allow for any infill or multi-family development in the downtown area which is discouraging developers from rejuvenating this area. I would jump at the opportunity to develop some high-end duplex projects on some of these larger lots but the red tape and opposition from locals has been substantial to say the least. You look at who is walking around the downtown and it is lower income and seniors. Allow some fresh development and bring in younger professionals and families and the business community would flourish in my opinion. Take it for what it is worth...

**Interview 5 |** Tirecraft – Darcey Cannon, Owner

- Been in business for 5 years, growing every year
- Downtown is good for him
- He is on the Chamber of Commerce
- 75% of customer base comes from Fort Saskatchewan
- High turnover of restaurants downtown
- Mentioned that Café Bench outside of downtown is really good
- Downtown needs an identity
- Brought up the farmers market last year as a good idea
- Thursday night market at Legacy Park is great
- He hopes that 5 years from now we will see a good pub, coffee shop, and patios downtown
- Millers ice cream does really well in the summer

### **Interview 6 |** Chamber of Commerce – Tamara Dabels, Executive Director

- Key challenges: Rent is too high, not enough foot traffic, inconsistent retail hours
- Weather was the main reason the downtown market didn't work last year, also because lots of the retailers were closed during the market, even the coffee shop!
- Coffee shop struggled from poor implementation, inconsistent hours, limited staff
- The old bookstore was great, sad that it's gone
- Atlantic Kitchen does well
- The Saturday Market was good
- People should want to go Downtown for "the experience"
- Pop-up shops, lofts, unique restaurants, patios, consistent signage, etc.
- Mentioned that Rolands is an awesome store
- Easter egg Crawl and Halloween Handy are both great
- They think that a Downtown BIA is a good idea, but might have pushback from Downtown Business Council (~25 members) and businesses that don't want to pay another fee
- Says 1/5 businesses survive 1 year, 1/10 survive 5 years
- Mentioned idea of a winter market similar to Spruce Grove Winter Fest
- Themes – "bike rodeo", "health eating", "art day" all with kids involved

### **Interview 7 |** Kjenner Financial – Randy Kjenner, Owner

- Operated downtown for ~30 years
- Mentioned the impact of losing Downtown Diner on the vibrancy of downtown
- High turnover with restaurants
- Streetscape improvements were great
- Vacant lots are an issue
- The financial node seems to be performing well
- The business façade improvements grant program was very helpful for them
- Mentioned Lacombe with many older special repurposed buildings whereas Fort Saskatchewan buildings are looking rough
- Markets are a great idea
- Doesn't see much of a retail future downtown, more services less stores, more residential

### **Interview 8 |** The Brant Hotel – Kam Choufi, Owner

- Too many restaurants and thinks that food trailers look unprofessional
- Canadian Brewhouse has taken a lot of his business
- Bought the hotel in January 2015, was in very bad condition
- Spent $300,000 – $400,000 on initial interior upgrades
- Barred "half the town" that caused trouble at his bar
- Plans to upgrade the exterior when he can, he thinks it is really ugly
- Wasn't aware if there is still a grant program for exterior improvements
- The legalization of marijuana has impaired his sales – people spend more on weed less alcohol

### **Interview 9 |** Pinder Chiropractic – Kevin Pinder, Owner

- Family industry for 42 years
- Large trade area
- High restaurant turnover downtown
- Thinks its important to figure out what gaps can be filled downtown in terms of retail
- Thinks the private sector needs to be more proactive and has caused some of the issues
- DT Business Council is not cohesive enough and part of the problem, strong need for a BIA