DOWNTOWN
FORT SASKATCHEWAN

# Market Gap Analysis

## City of Fort Saskatchewan

### December 2024

Completed by:

FBM

Completed for:

CITY OF FORT SASKATCHEWAN
ALBERTA

## Land Acknowledgment

We would like to respectfully acknowledge that the City of Fort Saskatchewan is located on Treaty 6 territory and Métis Nation of Alberta District 11. We recognize that we stand upon land that carries the footsteps of many Indigenous Peoples, including the Nehiyawak, Dene, Blackfoot, Saulteaux, and Nakota Sioux, and Métis.

The City honours the First Peoples of this land and is committed to fostering reconciliation through relationship building, knowledge gathering, and education.

*Text adapted from: City of Fort Saskatchewan Official Website*

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# Preface

Fowler Bauld & Mitchell Ltd. ("FBM") was commissioned by the City of Fort Saskatchewan to conduct a commercial gap analysis for their Downtown. In addition to the core analysis, an online Community Survey was also conducted by FBM. The study was carried out over the period of April to September 2024. On-the-ground fieldwork in the study community was carried out in May 2024.

The objective of this study is to throughly document the current business inventory and define the realistic Trade Area for which they serve. The purpose of this research was to identify the existing gaps and opportunities for retail, which would also help the City to enhance Downtown vibrancy and business attraction in support of the Downtown Development Strategy.

Taking a collaborative approach, FBM analyzed the business inventory and consumers' spending patterns. For the purposes of identifying the business counts by business category, FBM applied its own business classifications for retail and services to provide additional depth to the overall analysis. In doing so, FBM still recognizes and attempts to adhere to the North American Industry Classification System (NAICS) designations.

FBM further recognizes that within the Downtown Fort Saskatchewan study area, approximately 62 retail businesses closed or moved between 2019-2024. This reflects the strong impact COVID-19 had on retail businesses with personal services (27) and restaurants/bars (14) being particularly hard hit, as a result of repayment of CERB loans and other challenging financial metrics including inflation and rising food costs.

Any references to specific retailers do not represent a guarantee that they will locate in Fort Saskatchewan or Downtown, but that they have been identified based on an understanding of their typical site and market selection criteria. As with most retailers, there will be a requirement to provide compatible locations and spaces for their respective formats.

This analysis was conducted by FBM as an objective and independent party. 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 expression of the City of Fort Saskatchewan or FBM.

*FBM*

*2024*

## Glossary of Terms & Acronyms

**sf** - square feet

**psf** - per square foot

**$ psf** - dollars per square foot (an industry standard measure of annualized retail sales productivity)

**ICSC -** International Council of Shopping Centers "Innovating Commerce Serving Communities"

**Comparison Merchandise** - Comparison Merchandise is an industry term often synonymous with Department Store Type Merchandise (DSTM) and includes categories such as Fashion, Home Decor, Appliances and Electronics, Sporting Goods, etc, or categories that are typically found in more traditional "mall" or shopping centre environments.

**Quick Service/Limited Service F&B** - This represents fast food, grab-and-go, take-out only, or drive through types of restaurants, such as McDonald's, Tim Horton's or other cafe/coffee shops.

**Full Service F&B** - This represents restaurants or pubs that include table service seating or servers for meals and beverages.

**Specialty Retail** - This category of retail typically is a "catch-all" for a wide range of store types such as pet foods, arts & crafts, cellular phones, office supplies/ stationery, etc.

**Occupancy Cost Ratio** - A comparison of a retailer's annual occupancy costs (including base and percentage rent, taxes, common area maintenance (CAM), insurance and marketing to its annual sales volume expressed as a percentage of occupancy costs to sales.

**In-line store** - A retail outlet placed contiguous to neighbouring retailers such that their frontages are in a straight line and behind what is considered a leaseline.

**Psychographics/Lifestyle Segmentation** - The motivational forces that influence shopping patterns and consumer behaviour.

Figure P-1. Retail Merchandise Category Sorting Breakdown

## Introduction

The City of Fort Saskatchewan is located along the North Saskatchewan River in Alberta northeast of Edmonton and approximately 21km north of Sherwood Park. Described as a key urban service area within the Edmonton Metropolitan Region (EMR), Fort Saskatchewan has been identified as a key gateway community to Alberta’s Industrial Heartland, which continues to be a major employment area in this region and is expected to have continued job growth in future years.

## Trade Area

According to the 2024 Municipal Census data, the population of the City of Fort Saskatchewan is 29,857 which includes the population of the Downtown Walking Trade Area (DWTA) and its over 4,400 residents. Likewise, the Regional Trade Area (RTA) includes both the DWTA and the City with a total population of 54,660. Estimated for the year-end 2023, the population of the DWTA is 4,433 which is projected to grow by 1.41% annually over the next five years.

Total City resident spending (excluding health care and auto) is expected to increase to $711.6 million by 2029 and $824.3 million by 2034.

The RTA spending (excluding health care and auto) is expected to increase to $1.22 billion by 2029 and $1.38 billion by 2034.

Similarly, DWTA spending (excluding health care and auto) is $71.9 million and is expected to increase to $80.0 million by 2029 and $87.3 million by 2034.

As residential development is prioritized and continues to occur in downtown, it can be expected that spending within the downtown on local shops and services should increase.

With an estimated 8,000 direct and 30,000 indirect jobs, the industrial workforce in the “industrial heartland” around Fort Saskatchewan plays a significant role in boosting the city’s downtown area and further supporting its vitalization strategies.

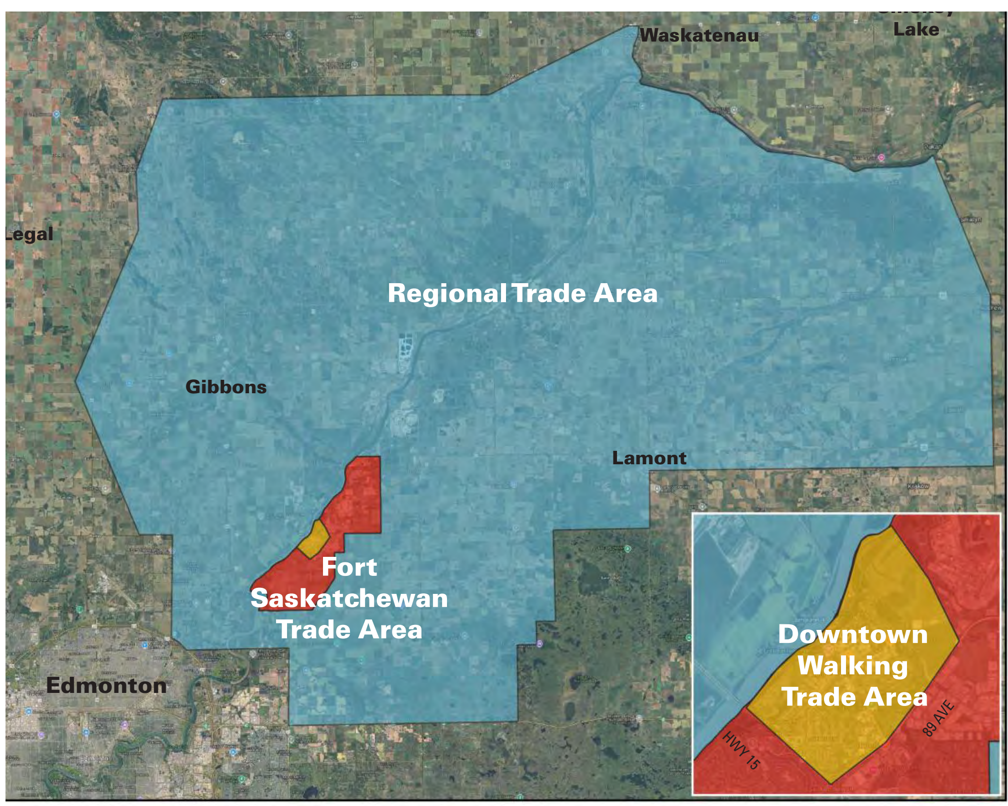
The industrial workforce, often employed in well-paying jobs in sectors like petrochemicals, energy, and manufacturing, brings considerable disposable income. These workers can stimulate the downtown economy by patronizing local restaurants, shops, and services, such as gyms, salons, and day-to-day shopping items. With thousands of workers commuting to or living in Fort Saskatchewan, the “miscellaneous inflow” demand for goods and services will naturally increase and lead to direct and indirect growth of local businesses, creation of new ones, and a diverse retail environment.

Moreover, the increased economic activity downtown driven by the industrial workforce creates more job opportunities in sectors like retail, hospitality, and services. This could absorb a portion of the local population, providing employment opportunities for those who may not work in the industrial sectors.

As more workers settle in or near Fort Saskatchewan, the demand for housing can rise. This may lead to an increase in residential developments or the revitalization of existing properties downtown. These workers are likely to seek proximity to amenities and services offered in the downtown core, leading to the growth of more mixed-use or downtown infill-type developments.

## Inventory

A summary of the current business mix inventory illustrates a total downtown ground floor commercial space of 569,941 sf. This floorspace includes Community Service, Professional & Financial Services as well as Medical & Wellness Services.



When excluding these "non-retail" segments, as well as automotive categories, the "retail only" inventory for downtown equates to 300,963 sf.

The Top 5 retail categories (excluding Professional & Financial Services and Auto) in terms of overall retail floorspace are:

1. Grocery, Convenience & Specialty Foods (58,988 sf)
2. Personal Service (49,455 sf)
3. Full Service F&B (43,041 sf)
4. Beauty & Personal Care (36,242 sf)
5. Specialty Retail (28,890 sf)

The top categories are then followed by Fitness & Leisure(19,658 sf) and Alcohol, Tobacco & Cannabis (14,028 sf).

Overall, Downtown Fort Saskatchewan has a mix of 89% local businesses to 11% in terms of the overall store count and a mix of 68% local to 32% branded in terms of the floorspace.

***Downtown Core Node***

The Downtown core node, is Fort Saskatchewan's oldest, densest and most walkable commercial area. 100 Avenue serves as the main spine for downtown core businesses in which the top 3 retail categories are:

- Full Service F&B (25,461 sf)
- Fitness & Leisure (17,637 sf)
- Personal Service (12,428 sf)

The overall mix of retail in the downtown is dominated by professional and medical businesses which will be the key to attracting residential and supportive retail businesses. The retail mix shows a trend towards leisure and relaxation whereby restaurants, fitness and personal services dominate the area.

***99th Avenue Corridor***

The 99th Ave Corridor includes a mix of mid-size retail stores, multi-story commercial buildings and stand alone stores. To the southwest lies the Fort Station site which is currently being redeveloped with commercial and residential uses.

The inventory by retail merchandise category is most represented by the following:

- Grocery, Convenience & Specialty Foods (49,776 sf)
- Personal Service (37,027 sf)
- Beauty & Personal Care (21,392 sf)

All downtown businesses under the "Grocery, Convenience & Specialty Foods" category are located in the 99th Ave Corridor node. 99th Ave Corridor has both the highest vacant floorspace largely attributed to the ongoing redevelopment at the former Fort Mall, estimated at 29,161 sf. As residential and redevelopment occurs it can reasonably be expected that vacancies will be absorbed.

# Balanced Retail Hierarchy

A well-planned retail hierarchy ensures that businesses of all sizes, especially local, independent ones, can thrive. Main streets and downtowns, like that in Fort Saskatchewan are critical for incubating and supporting small businesses, while larger retail nodes or corridors accommodate the broader desired and necessary branded national chains and larger format retailers. This balance helps keep local dollars circulating within the community and provides diverse shopping options for residents.

Downtown Fort Saskatchewan is an essential node for fostering community cohesion, social interaction and civic engagement, and creating public spaces where residents gather. Events, public spaces, and a mix of retail, dining, and entertainment can help strengthen community ties, making Fort Saskatchewan a vibrant place to live. These areas serve as the "heart" of the community, where people come together for shared experiences. Importantly, a thoughtful retail hierarchy helps minimize sprawl. Main streets, mixed-use developments and traditional downtowns encourage walkability and reduce car dependency and become even more prominent when more housing is developed within, adjacent to or in direct proximity. This leads to more sustainable, eco-friendly growth that can preserve Fort Saskatchewan's character while accommodating expansion or intensification of retail in strategic and compatible areas.

A healthy retail environment is essential to ensure that Fort Saskatchewan is attractive to existing, but especially new residents and businesses. Main streets and vibrant downtowns, with their unique shops and public spaces, appeal to people looking for a sense of community. Meanwhile, peripheral larger nodes provide the convenience and variety that businesses and residents seek, making the town an attractive place to live and invest. Fort Saskatchewan's downtown is particularly unique because it offers both, above all within walking and in proximity to neighbourhoods where future residential development can be serviced and prioritized.

Across the retail industry, the adage "retail follows rooftops" has proven to be true. In the case of Fort Saskatchewan's growth as a city, this is adage rings true.

However, over time as retail became more prominent across the city along Hwy 21 and the broader region to Northeast Edmonton and Sherwood Park, the influence of nearby residential support for the downtown has declined because the amount of adjacent residential and overall housing mix still reflects a time when the downtown was the core retail location. This is why the amount and type of housing mix must continue to be prioritized within and in proximity to the Downtown to ensure that the current amount of retail floorspace and retail opportunity can be supported and economically viable for the business owners and operators.

The importance of increasing the amount and diversifying the mix of housing in and around the downtown, is not only to provide a solid consumer base for retailers in walkable or more locally accessible location, but because it promotes a healthier community overall. From a retail perspective, a diverse housing stock for both customers and employees are also critical for supporting existing businesses and attracting new ones.

## Resident Survey

A community survey was conducted by FBM to inform the Gap Analysis that generated a total of 848 responses:

- 817 Online responses
- 5 Paper submissions.
- 26 Pop-Up Market survey submissions.

Many respondents expressed appreciation and enjoyment of Downtown for its beauty, walkability, proximity to parks and recreation, and recent investments in public spaces and storefronts. There was a strong desire amongst respondents for more places to socialize and linger Downtown, especially outdoors. Patios and sidewalk cafes were frequently encouraged. Few respondents reported being aware of the City's Sidewalk Cafe program which was revised and relaunched in 2020.

## Demand Forecast

Retail floorspace demand forecasts to 2034 are premised on conservative, maintained rates of market share and reveal demand for just under 135,000 sf of new floorspace in downtown. Not all of this floorspace would be in the form of new space but rather a combination of existing vacancies which currently account for almost 90,000 sf, or 67% of the forecasted demand. This would leave approximately 45,000 sf that could be accommodated in new build or infill developments.

## Retail Positioning

As noted in the Consumer Survey responses, ideas for increasing the draw to Downtown commonly included:

- More events (e.g. street closures, night market, cultural events);
- Greater variety of shops:
  - Sit down restaurants, coffee shops/ cafes, breweries and butchers;
  - More shops and services for kids, youth and families, particularly recreation and entertainment;
  - Bookstores, hobby and music shops;
- Indoor and outdoor recreation opportunities year-round for all, especially for families.

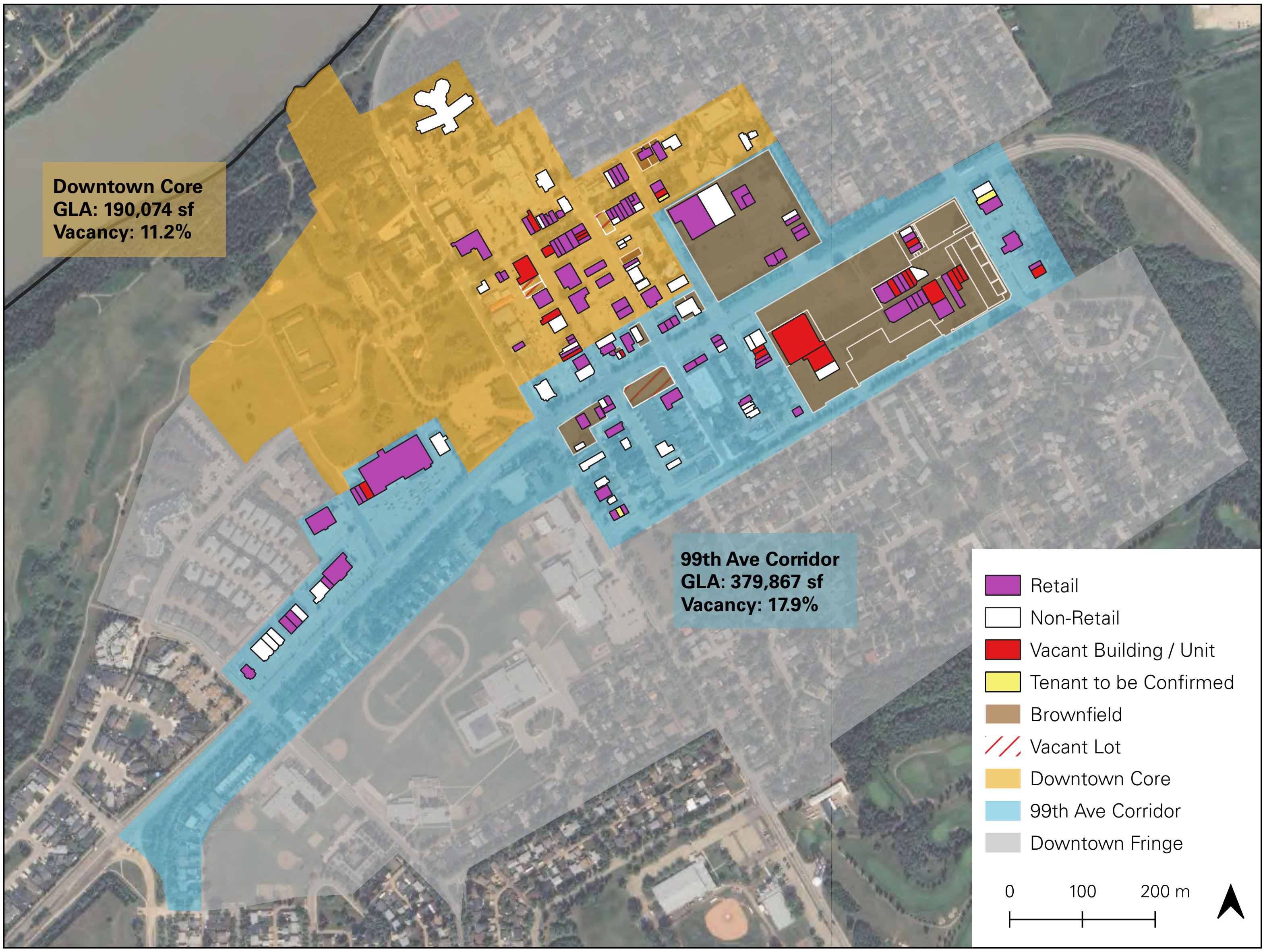
Missing specific retail, services or restaurants was selected by the majority (71.7%) of respondents as a primary reason they don't visit Downtown. Missing specific merchandise was the next most common reason selected by 46.9% of residents.

One method to attract businesses is to work with the existing leaseholders or property owners to consider redemising larger spaces into temporary smaller micro retail units or pop ups that can incubate local concepts while generating cash flow for the landlord(s).

Alternatively and for many businesses the likelihood of attracting a corporate run retail store/concept is limited, but the franchise or licensee model is a distinct possibility. Through the city, perhaps a local "franchisee" event could be held with local banks and others to assess the opportunity to have a stable of potential franchisees on hand. This approach would give great confidence to some brands for whom there is interest in understanding the depth of the franchise potential.

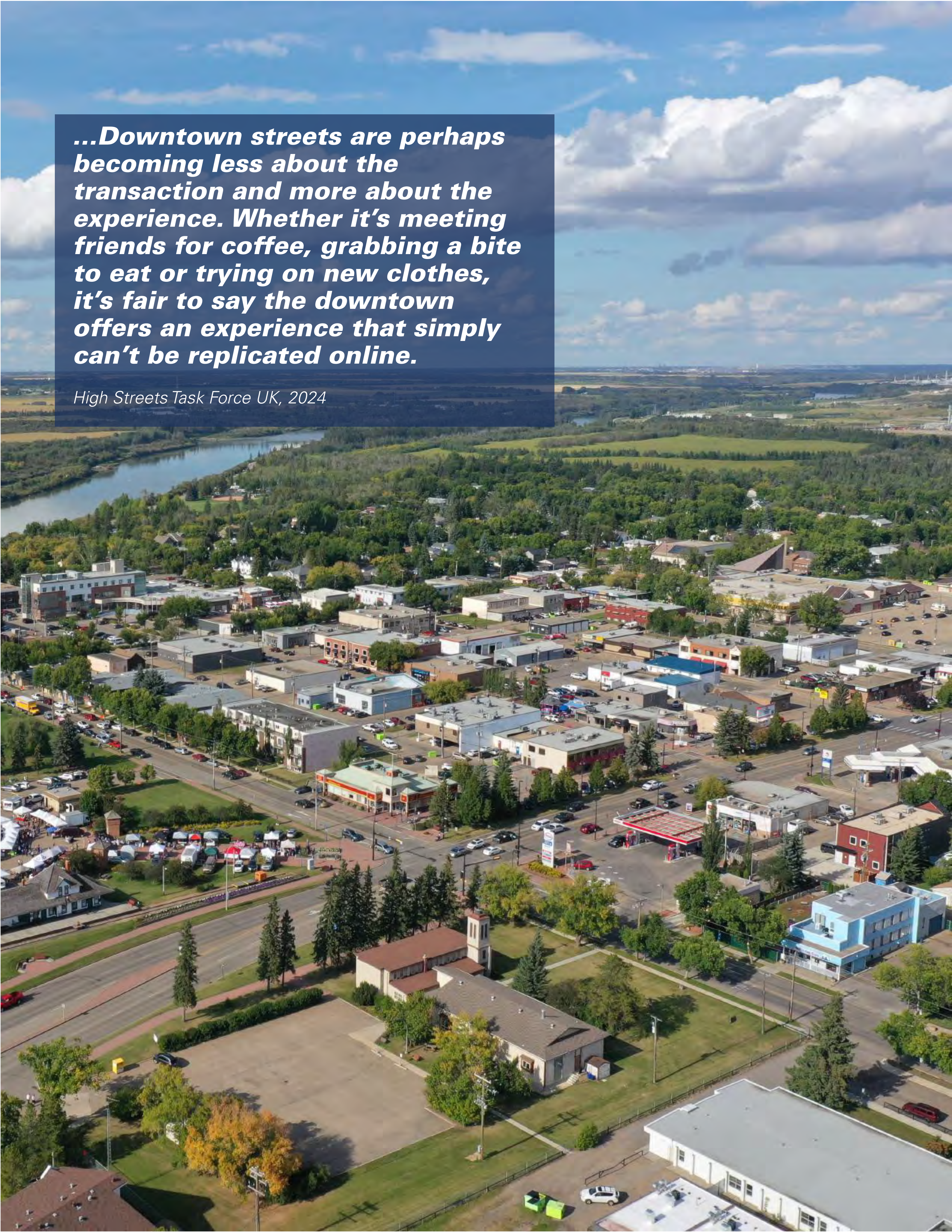
Additionally, there are opportunities to cultivate local independent store types that would be equipped to fit within the downtown as either pop-up incubators or full-time tenants. Smaller communities and those with essential downtowns or main streets, must continue to cultivate an environment in which local independent stores can succeed. Independent stores contribute to community vitality with unique offerings and experiences, and often have more flexibility to adapt to changing environments compared with larger businesses.

Downtown Study Area Inventory Summary by Node



| Category | Downtown Profile & Analysis 2019 | Downtown Market Gap Analysis 2024 | Notes |
|---|---|---|---|
| Downtown Walking Trade Area Population | 4,296 | 4,433 | The Municipal Census Data (2024) indicates a population increase of 3.1% in the Downtown Walking Trade Area. |
| TOTAL - all streetfront inventory | 433,940 sf | 569,941 sf | An increase in streetfront inventory was accounted for by new commercial development on the Fort Mall site (7,158 sf) whereby the 2019 study had removed the former Fort Mall from inventory |
| VACANT of all streetfront inventory | 64,890 sf (15%) | 89,278 sf (15.7%) | Drops to 9.8% when excluding the specific vacancies discussed in the Downtown Core and 99th Ave Corridor nodes.<br>Given that a industry standard vacancy of 4-5% is considered a healthy retail environment, Downtown Fort Saskatchewan still exhibits a higher overall vacancy, meaning tht active promotion of downtown vacancies should be pursued vigorously with property owners and the general public. |
| Downtown Retail only inventory | 304,011 sf | 300,963 sf. | Consistent retail base since 2019 with some general retail turnover. Most notably, while Giant Tiger exited the downtown, the attraction of a DollarTree has been met with considerable success in the same space. |
| Forecast NEW Floorspace Demand | N/A | 134,545 sf | Not all of this floorspace would be in the form of new space but rather a combination of backfilling existing vacancies which currently account for almost 90,000 sf, or 67% of the forecasted demand. This would leave approximately 45,000 sf that could be accommodated in new build or infill developments. |
| 5 top retail categories in Downtown | 1. Grocery & Specialty Foods (40,480 sf)<br>2. Specialty Retail (35,530 sf)<br>3. Fitness & Leisure (32,500 sf)<br>4. Personal Services (27,253 sf)<br>5. Arts & Entertainment (18,592 sf)<br>5. Full Service Restaurants (18,385, sf) | 1. Grocery, Convenience & Specialty Foods (58,988 sf)<br>2. Personal Service (49,455 sf)<br>3. Full Service F&B (43,041 sf)<br>4. Beauty & Personal Care (36,242 sf)<br>5. Specialty Retail (28,890 sf)<br><br>The top categories are then followed by Fitness & Leisure(19,658 sf) and Alcohol, Tobacco & Cannabis (14,028 sf). | In 2024, the overall mix of retail in Downtown Core continues to be dominated by professional and medical businesses which will be the key to attracting residential and supportive retail businesses. Financial institutions like RBC and CIBC are also very important to retain in the downtown even as online banking becomes more common. Always keep in contact with the banks to see if they are considering relocating or perhaps downsizing so that you can work with them in creative solutions to their space.<br>The 99th Ave Corridor offers a mix of mid-size retail stores and multi-storey commercial buildings. All Downtown businesses under the "Grocery, Convenience & Specialty Foods" category are located in 99th Ave Corridor node. |

| Category | Downtown Profile & Analysis 2019 | Downtown Market Gap Analysis 2024 | Notes |
|---|---|---|---|
| | Downtown should be open for business evenings and weekends | Store and business hours continue to be an important consideration, even though staffing is an ongoing challenge | The **DAP Stay Open Late Campaign 2022** had a positive impact; some businesses reported finding new clients during the campaign<br>Downtown restaurants operate until 8 PM or later, including on weekends<br>The majority of Beauty and Personal Care establishments are open at least on Saturdays<br>The Public Library is open on weekends |
| | Attract more retail and shopping<br>Attract unique boutique retail outlets<br>Offer a coffee shop/café in Downtown | Offer a greater variety of shops including:<br>Sit down restaurants, coffee shops/cafés, breweries and butchers<br>More shops and services for kids, youth and families, particularly recreation and entertainment<br>Bookstores, hobby and music shops | **Recommendation**: Opportunity to highlight the economic impact of "shopping local" in Downtown Fort Saskatchewan. Developing a shop local campaign should address both the unique challenges of supporting local independent businesses and the broader goal of retaining resident spending across the City.<br>**Consider** incentives and rewards or loyalty program for Downtown businesses |
| Key findings from community engagement | Recognize and differenciate the needs of small family-owned business versus large businesses and corporations | N/A | |
| | Increase the number of people living in Downtown | Housing was also recognized as a pressing local need which future Downtown development can address. The amount and type of housing mix must continue to be prioritized within and in proximity to Downtown to ensure that the current amount of retail floorspace and retail opportunity can be supported and economically viable for the business owners and operators. | **Downtown Action Plan (DAP)** introduced two new incentives<br>**Downtown Development Strategy (DDS)**: focuses on increasing residential density in Downtown, encouraging housing diversity, marketing the "Why Live Downtown" campaign, and promoting opportunity sites for housing |
| | Vacant lots need to be dealt with either as a strategy or penalty to stimulate activation of the space | Harness vacant lots for outdoor activities | **Downtown Development Strategy (DDS)** is focusing on activation of vacant lots and commercial spaces. |
| | Markets and events must be consistently programmed year-round, even in winter | Offer more events (ex. Street closures, night market, cultural events)<br>Indoor and outdoor recreation opportunities year-round for all, especially for families | **DAP**: Economic Development supported DBC "Night of Comedy"<br>The Shape Your Community Grant supports small-scale, resident-led neighbourhood improvement projects, which can include enhancing underutilized or vacant spaces, creating community gardens, and installing public art. |



***…Downtown streets are perhaps becoming less about the transaction and more about the experience. Whether it's meeting friends for coffee, grabbing a bite to eat or trying on new clothes, it's fair to say the downtown offers an experience that simply can't be replicated online.***

*High Streets Task Force UK, 2024*

# 1.0 Introduction

## 1.1 Scope of Study

Fowler Bauld & Mitchell Ltd. ("FBM") was commissioned by the City of Fort Saskatchewan to conduct a commercial gap analysis for their Downtown. In addition to the core analysis, an online Community Survey was also conducted by FBM.

The study was carried out over the period of April to September 2024. On-the-ground fieldwork in the study community was carried out in May 2024.

The objective of this study is to throughly document the current business inventory and define the realistic Trade Area for which they serve. The purpose of this research was to identify the existing gaps and opportunities for retail, which would also help the City to enhance Downtown vibrancy and business attraction in support of the Downtown Development Strategy.

## 1.2 Report Structure

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

**Section 2 - Regional and Local Context**: Lays out the important regional and local context of the Downtown Fort Saskatchewan in terms of geographic location, regional access and traffic counts, including relevant plans, studies and initiatives.

**Section 3 - Trade Area**: Identifies and defines the Town's Trade Area and demographics including retail spending and mobile phone tracking data.

**Section 4 - Commercial Supply:** Provides a detailed documentation, tabulation and summary of Downtown Fort Saskatchewan's ground oriented retail business mix. This section also assesses the location and characteristics of Downtown's current nodes of retail activity ("supply"), including developing or future planned retail sites. Fieldwork assessments included identifying and documenting in detail the Downtown's retail inventory by retailer, merchandise category and NAICS industry classification.

**Section 5 - Community Survey:** Introduces and analyzes the results of the resident and visitor survey for Fort Saskatchewan's Downtown.

**Section 6 - Market Demand Assessment**: Based on an extensive assessment of the current "supply" and Trade Area spending, the current demand is then estimated and measured against the market potential. This quantifies future retail demand over the next 10 years.

**Section 7 - Key Findings:** Summarizes the successes to-date of the Downtown Action Plan, but identifies a host of other incentives and programs that could be considered to bolster the overall investment and incentive take-up in the Downtown. This section also identifies some retail store type targets for enhancing the positioning of Downtown Fort Saskatchewan.

Figure 1-1. Fort Saskatchewan Study Area

*(Source: Fort Saskatchewan MDP. Emphasis added by FBM)*

# 2.0 Regional and Local Context

## 2.1 Introduction

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

## 2.2 Regional Context

Fort Saskatchewan is part of the Edmonton Metropolitan Region (EMR), located in central Alberta (**Figure 2-1**). Forming part of the Calgary-Edmonton Corridor, the EMR plays a prominent role in Alberta's economy and transportation system.

Fort Saskatchewan has been identified as a key gateway community to Alberta's Industrial Heartland, which continues to be a major employment areas in this region[1]. Major employment areas including Alberta's Industrial Heartland are expected to have continued job growth in future years, which can be a strong advantage for Fort Saskatchewan.

1 *Edmonton Metropolitan Regional Growth Plan, 2022*

## 2.3 Local Context

Fort Saskatchewan is located within Treaty 6 territory and Metis Nation of Alberta District 11. The City is located in lands of the Nehiwawek, Dene, Blackfoot, Saulteaux, Nakota Sioux, and Metis.

The City of Fort Saskatchewan is located along the North Saskatchewan River in Alberta. The City is located in the northeast of Edmonton and is approximately 21km north of Sherwood Park. Described as a key urban service area within the EMR[2], Sherwood Park is an important commercial node to consider when exploring retail opportunities in Fort Saskatchewan.

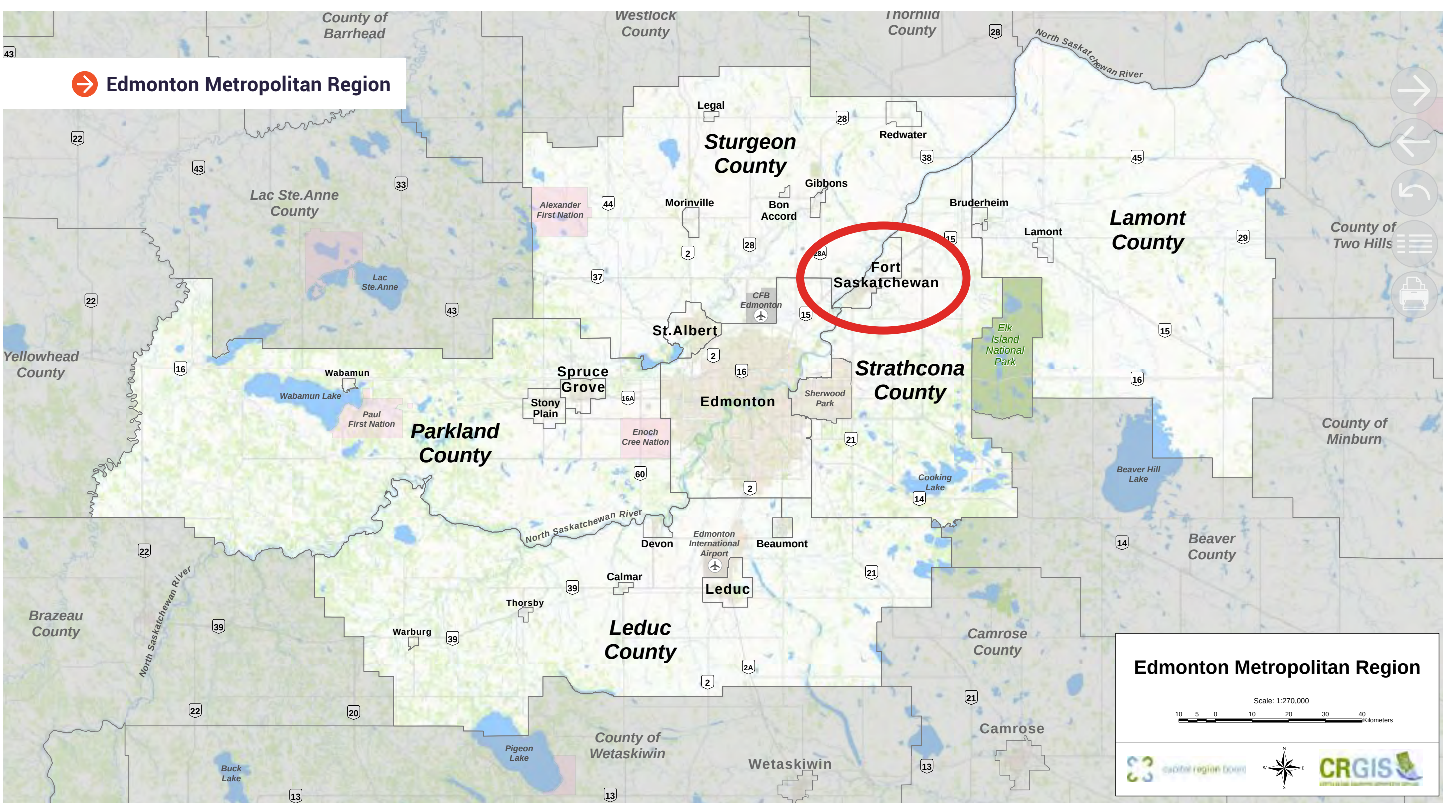
Though Sherwood Park is competitive in many respects to Fort Saskatchewan, what it does not have is a walkable and community-centred downtown with the historic and modern growth attributes of Fort Saskatchewan.

The current "gap" in the geography between Fort Saskatchewan and northeast Edmonton and Sherwood Park creates an opportunity for the City of Fort Saskatchewan and its downtown to become the commercial hub for the Industrial Heartland and its burgeoning workforce, all of whom will be seeking residential, recreation, retail and relaxation.

2 *Edmonton Metropolitan Regional Growth Plan, 2022*

Figure 2-1. Edmonton Metropolitan Region Context Map

*(Source: Edmonton Metropolitan Region Growth Plan; emphasis by FBM)*



## 2.4 Relevant Plans & Studies

This section examines relevant plans and policies that shape the current state of land use and growth planning in Downtown Fort Saskatchewan. The background review is organized in the following hierarchy:

- *Inter-municipal Planning*
- *Municipal and Land Use Planning*
- *Downtown Documents*

### *2.4.1 Inter-municipal Planning*

The **Edmonton Metropolitan Regional Growth Plan** (2022) built upon the 2010 Capital Region Board Growth Plan. The Plan outlined directions for regional growth and development over the next 30 years. The Plan emphasized a strong focus on economic prosperity, as reflected on the following excerpt of the "50-Year Vision":

- *The Edmonton Metropolitan Region is the dominant hub for northern Alberta and is recognized globally for its economic diversity, entrepreneurialism, leadership in energy development, environmental stewardship and excellent quality of life. The Region is anchored by a thriving core that is interconnected with diverse urban and rural communities.*

In this Plan, the Region consisted of three policy tiers: Rural Area, Metropolitan Area, and Metropolitan Core. Fort Saskatchewan was part of the "Metropolitan Area", which was described as having an urban settlement pattern and offering major employment opportunities[1].

### *2.4.2 Municipal and Land Use Planning*

The **Community Sustainability Plan** (CSP, 2014) built on the City's Sustainability Plan which was developed in 2010. This Plan provided directions for subsequent Plans, including the Old Health Centre Redevelopment Brief.

The Plan included several community sustainability priorities that were also relevant to Downtown:

- **Priority Area A - Compassionate Community & Sense of Community**: The Plan supported increasing Downtown density. The Plan also suggested that a post-secondary institution could be in Downtown while also offering student housing, which could encourage students to spend more time in Downtown.
- **Priority Area D - Supporting Businesses:** The Plan aimed to create a vibrant and active Downtown, with "higher buildings, walkable shopping opportunities, amenities, entertainment, restaurants, and activities"[2] (page 13). The Plan aimed to increase the number of Downtown business licenses by 20%.
- **Priority Area E - Urban Resources:** The Plan called for developing a "downtown land use designation" that would include specific regulations to support the implementation of the Downtown Area Redevelopment Plan.

1 *Page 24, Edmonton Metropolitan Regional Growth Plan, 2022*

**Where Do We Grow from Here? Fort Saskatchewan Growth Study** (2015) aimed to document and project Fort Saskatchewan's past, present, and future growth and determine the size of land that would be required for residential, commercial, industrial, and institutional developments over the next 50 years.

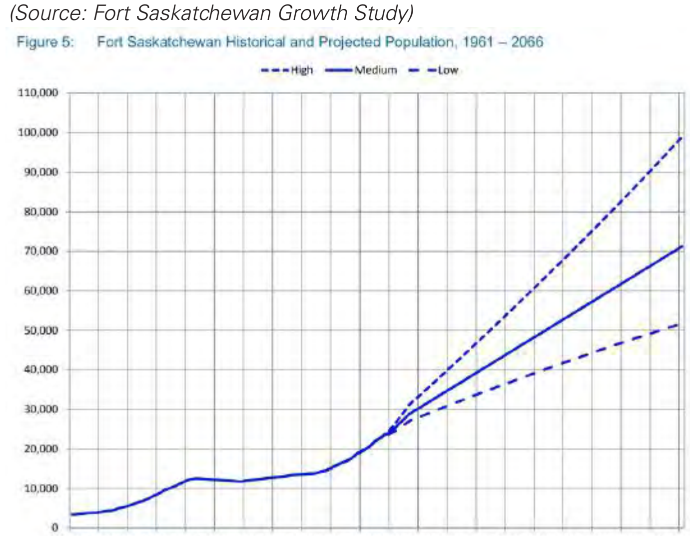
The Study highlighted that the City's population grew from 2,972 in 1961 to 24,040 in 2015. While the population growth was relatively stable from the 1980s to the 1990s, the population saw a sharp increase since early 2000s. The Study noted that key factors of population growth included increased employment opportunities within Alberta's Industrial Heartland and the City's sense of small, vibrant community environment (p.10).

The Study offered three population projections: low, medium, and high (**Figure 2-2**), with annual growth rates of 1.6%, 2.2%, and 2.9% respectively over the 52-year period (2014-2066). By the year 2066, the City's population was projected to increase to 28,911 (low), 48,408 (medium), or 76,138 (high).

2 *Page 13, Fort Saskatchewan Community Sustainability Plan, 2014*

Figure 2-2. Fort Saskatchewan Historical and Projected Population Growth

*(Source: Fort Saskatchewan Growth Study)*



Based on the historical population growth, the Study concluded that the medium projection scenario would be the most reasonable model to apply to the City's Growth Study. In this model, the population was expected to double by 2038 based on the 2014 population (22,808 to 45,958).

Fort Saskatchewan's **Land Use Bylaw (LUB)** was last updated in 2020. The City is currently in the process of creating a new LUB to ensure that all regulations are consistent with the MDP (adopted in 2021).

Downtown Fort Saskatchewan is covered by the following Districts which accommodate a wide range of commercial uses (illustrated in **Figure 2-3**):

- **Core Commercial (CC-D):** As the "heart of downtown", this District aims to provide a mix of commercial developments, including retail, office, and food services.
- **Mall Precinct (MP-D)**: This District permits "new medium to high density residential, commercial, office, institutional, and mixed use developments" (10.15.1). The LUB emphasizes that this District should provide special attention to creating open spaces, amenity spaces, and interactive streetscapes, reflecting the aim of offering a pedestrian-friendly environment.
- **Mixed Use (MU-D)**: Located in the southwest corner of Downtown, this District permits a variety of mixed-use developments, including stand-alone commercial development and buildings of both commercial and residential uses. The LUB raises special emphasis on encouraging live work units at the ground level.
- **Transitional Residential (TR-D):** While this District is primarily residential, the LUB states that small-scale commercial developments may be considered. Discretionary uses include personal, pet care, and professional and financial services.
- **99 Commercial (99C-D):** This District is intended to support a variety of commercial developments. The LUB highlights that this District can act as a key "entrance corridor" by permitting a variety of retail stores, including liquor stores and convenience stores, as well as food and drinking services.

**Our Fort, Our Future: City of Fort Saskatchewan's Municipal Development Plan** (MDP, 2021) aimed to offer directions for development for Fort Saskatchewan in response to its growing population. The MDP identified the sense of community as one of the key assets that the City could continue to build upon for community growth. With the "Forward Thinking" approach, the MDP aimed to further reflect the evolving climate as well as global and local economic trends.

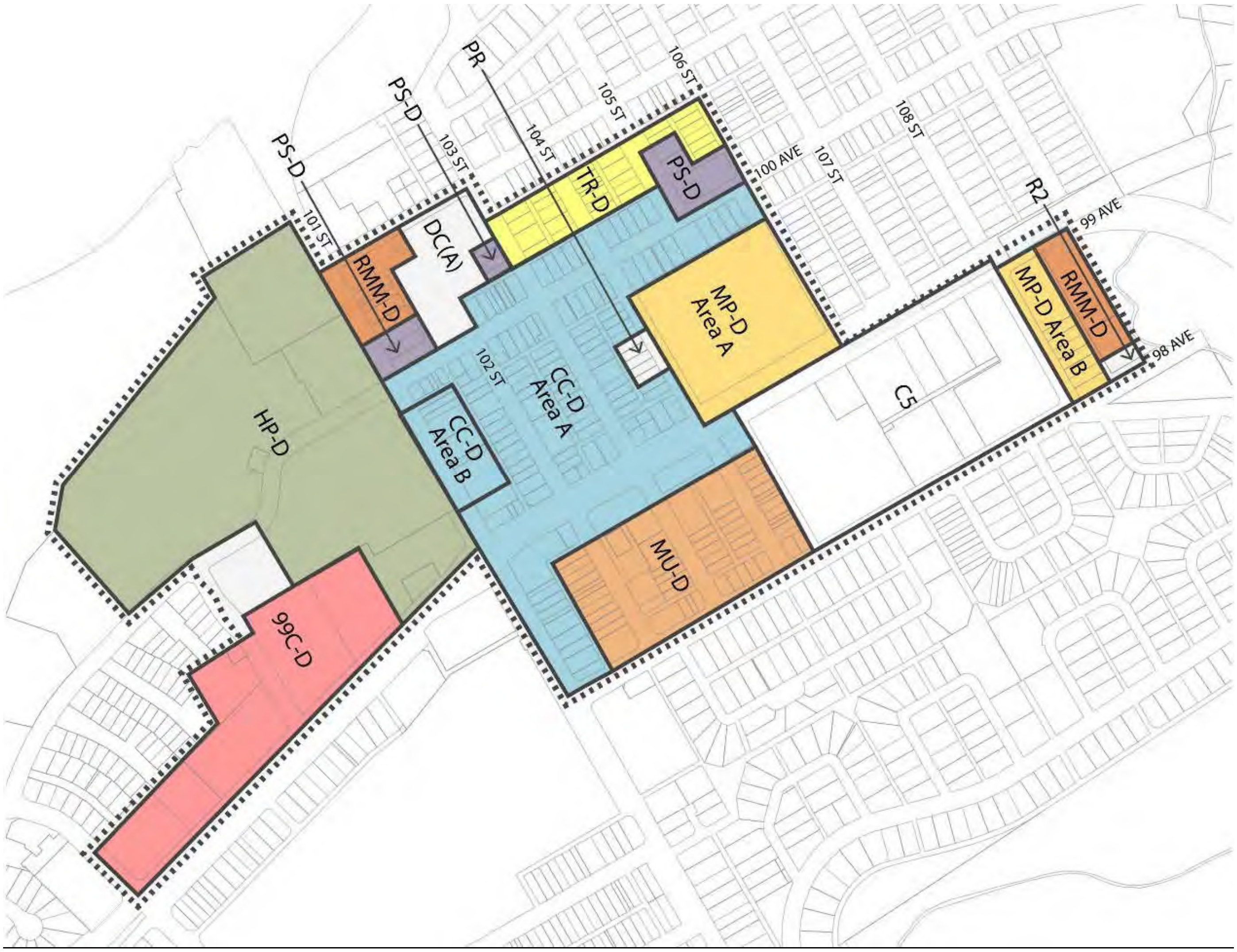
Described as "the heart of the community", Downtown Fort Saskatchewan was one of the key neighbourhoods in the MDP. However, despite its historical significance and proximity to other commercial clusters, Downtown has been experiencing a high vacancy rate of 15% (Retail Gap Analysis, 2019), with particularly high vacancy rates in Fort Station and Market Square (33.2%). Residents of the City called for a greater variety of restaurants and local businesses within Downtown. The MDP further noted that Downtown only has around 4,250 residents. Other City residents have more convenient access to the commercial areas located along the corridors of Highway 15 and Highway 21. While the City's population had almost doubled since 2000, the population of Downtown had seen a slight population decline, due to aging demographics and fewer children.

Downtown Fort Saskatchewan consists of three key policy areas: **Downtown Core**, **Downtown Fringe**, and **99th Avenue Corridor** (**Figure 2-4**). The MDP highlighted that the commercial areas in Downtown Fort Saskatchewan and corridors along Highway 15 and Highway 21 could benefit from commercial intensification. The MDP also emphasized that Downtown and highway corridors could "act as two distinct yet complementary commercial areas"[3] to contribute toward economic growth of the whole City. The MDP suggested while the Downtown could primarily serve the residents of the City, the highway commercial areas could be a main hub for the traveling public. For both Downtown and highway commercial corridors, the MDP encouraged providing incentives for "short term and temporary use of commercial spaces by local and creative businesses" (9.3.19), which could contribute toward mitigating the current high vacancy rate.

*3 Page 63, Fort Saskatchewan MDP, 2021*

Figure 2-3. Downtown Fort Saskatchewan Land Use Districts

*(Source: Fort Saskatchewan LUB, 2020)*




## Downtown District Zoning

- CC-D Core Commercial Downtown
- MP-D Mall Precinct District
- MU-D Mixed Use Downtown
- RMM-D Medium Density Multiple
- TR-D Transitional Residential District
- 99C-D Commercial Downtown
- PS-D Public Service Downtown
- HP-D Historic Precinct District

## Non-Downtown District Zoning

C5 – Fort Mall Redevelopment District

DC(A) – Direct Control (Administration)

PR – Parks and Recreation District

R2 – Semi-Detached and Duplex Residential District

### *2.4.3 Downtown Document Review*

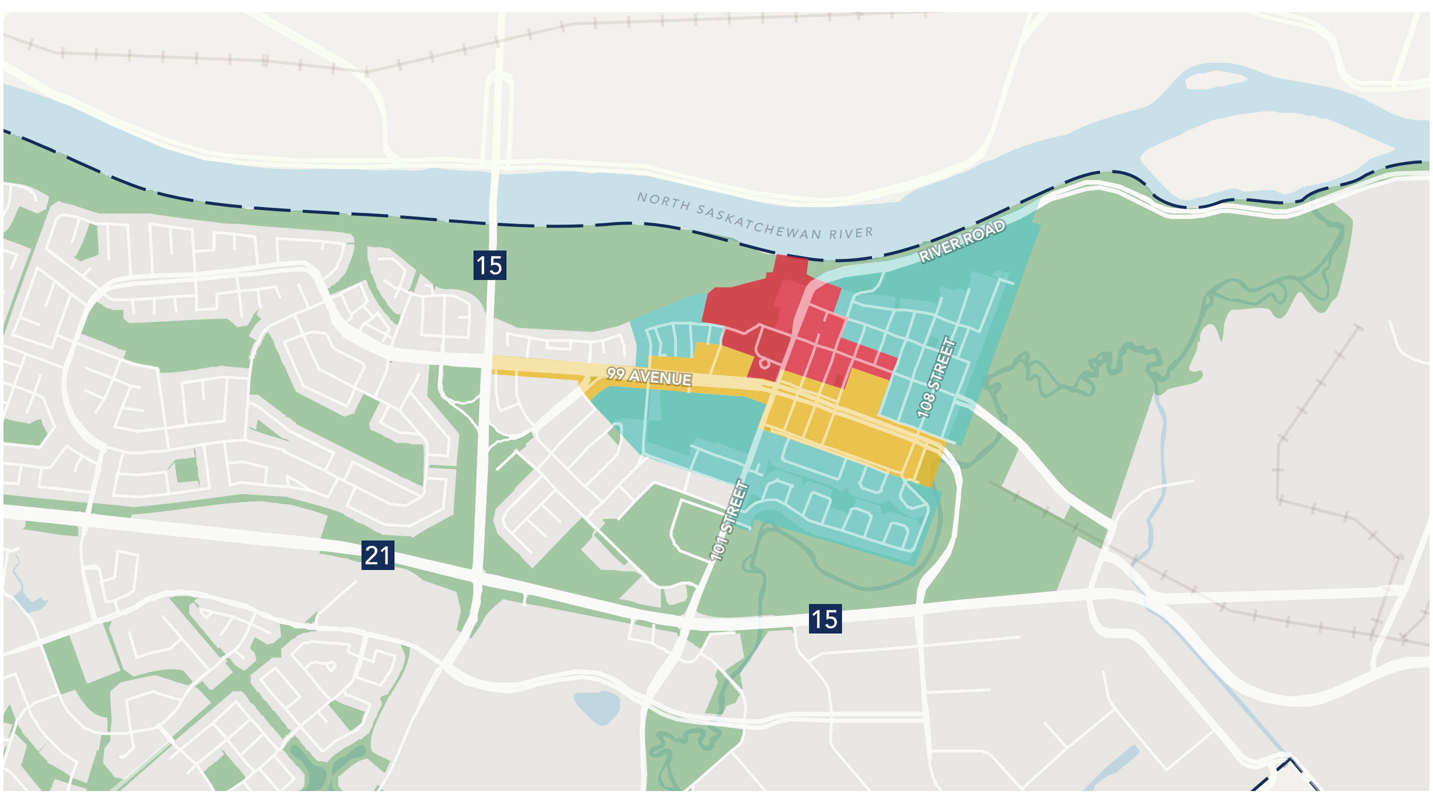
The **Downtown Area Redevelopment Plan** (ARP) was approved by Council in 2009 and was implemented in 2012. The ARP aimed to provide directions for future development and design guidelines that were specific to Downtown sub-areas (defined as the Precincts).

**Figure 2-5** illustrates the boundaries of the Precincts. Key Precincts that were relevant in the Downtown retail market were the following:

- ***Core Commercial Precinct***: The Plan highlighted that this area could offer a wider range of businesses. The Plan aimed to promote the historical buildings in this area, given that this Precinct is the oldest commercial district in the City.
- ***Live/Work Precinct***: This Precinct is adjacent to the Core Commercial and the Mall Redevelopment Precincts. Policies in this Precinct included enhancing pedestrian linkages across 98 Avenue to the Live/Work Precinct and offering maintenance for buildings that need improvement.
- ***Mall Redevelopment Precinct***: This Precinct includes the two large mall sites that could be redeveloped. On the two mall sites, the Plan suggested that areas along 104 Street and 99 Avenue could primarily offer commercial uses while residential uses could be feasible along 98 Avenue, 106 Street, and 108 Street (See **Figure 2-6** for detailed future land use concept plan)
- ***Northeast Transition Precinct***: Policies in this Precinct were intended to support a variety of retail and commercial uses while retaining the established residential neighbourhood in the north of 100 Avenue.
- ***99th Commercial Precinct***: Generally described as a stable commercial neighbourhood, policies in this Precinct were intended to further accommodate a variety of commercial development as well as mixed-use development with residential uses above ground floor.

Figure 2-4. Fort Saskatchewan Downtown Policy Areas

*(Source: Fort Saskatchewan MDP, 2021)*




CITY OF FORT SASKATCHEWAN ALBERTA

Open Space & Natural Areas
Downtown Core
Downtown Fringe
99th Avenue Corridor

The **Old Health Centre Redevelopment Brief** (2013) outlined primary objectives of the redevelopment and core design principles for the Old Health Centre site. The Brief aimed to ensure that the redevelopment would reflect the visions and priorities in the City's MDP as well as the Community Sustainability Plan (CSP).Core principles of the Redevelopment Plan included:

- ***Sustainable Design***: One of the key elements was to offer efficient access to "essential neighbourhood services" including retail businesses for the subject area.
- ***Ecological Design***: The Plan emphasized that the site design should respect the surrounding ecosystem and that the redevelopment would support the objectives of the CSP.
- ***Livability***: The Plan supported the appropriate scale of diversity and intensity of land uses to create a sense of local character.
- ***Beauty***: Redevelopment should offer positive relationships between users and the built environment to make the site more welcoming and attractive.
- ***Accessibility***: Redevelopment should commit to offer complete streets that would be safe, barrier-free, and inviting for all users.
- ***Health***: The Plan emphasized that redevelopment proposals should support both physical and social well-being.
- ***Flexibility***: The redevelopment plan should be responsive to changing market needs and conditions.

Figure 2-5. Fort Saskatchewan Downtown Precincts

*(Source: Downtown ARP, 2009)*

Figure 2-6. Fort Saskatchewan Downtown Future Land Use Concept Map

*(Source: Downtown ARP, 2009)*


The **Retail Downtown Profile & Analysis** (2019) developed recommendations for Fort Saskatchewan based on the retail inventory in Downtown Fort Saskatchewan and stakeholder interviews.

**Figure 2-7** illustrates the summary of the retail nodes in Downtown Fort Saskatchewan. Key findings included:

- **Downtown Core**: Despite being the central neighbourhood of Downtown, this node had higher vacancy rate (12%). The Study also highlighted a small inventory of "Limited Service Restaurants" in this node (0.8%), which could discourage users from visiting or having social gatherings in this node.
- **Uptown**: This node, including Fort Station and Market Square, had the highest vacancy rate of 33.2%. The Study highlighted the auto-oriented environment in this area, suggesting an opportunity for pedestrian-friendly development and increased residential density in the surrounding area.
- **Midtown**: While Midtown had relatively healthier vacancy rate, the Study noted the poor quality of retail businesses in this node, making the node less attractive for users.
- **Downtown West**: This node had the healthiest inventory overall, with the lowest vacancy rate and a greater range of businesses, including grocery stores, entertainment facilities, and professional services.

The Study conducted nine interviews with business stakeholders in retail, office, professional, and personal service sectors to explore the current state of Downtown. Common responses among participants included recommendations to offer consistent programming throughout the year, establishing a functional Business Improvement Association, and mitigating high rental rates.

The **Vibrant Downtown: What We Heard Report** (2019) summarized the results of two public workshop sessions held in March 2019 and an online questionnaire that explored possible actions to create a more vibrant Downtown in the next three years.

The Plan defined "vibrancy" as:

- *More people downtown*
- *People come downtown more frequently*
- *People stay downtown longer*[4]

The two public engagement sessions used "rapid prototyping" process to allow participants to communicate their ideas using physical models that they created. The participants developed seven prototypes that exhibited ten ideas:

1. Activate vacant lots
2. Beautify vacant lots
3. Activate Legacy Park
4. Re-Design Central Gathering Plaza
5. Display Wayfinding Information
6. Develop Downtown Fort App
7. Offer Downtown Tours
8. Strengthen Connection to/from the River Valley
9. Install a Gateway Sign
10. Install a Highway Sign

These ideas shaped the online questionnaire that was available for the public for a period of two weeks. A total of 548 people responded, out of which 84% fully completed the questionnaire.

Among the questionnaire respondents, the three most supported ideas were 1) Activate Legacy Park (89.2%), 2) activate vacant lots (87.8%), and 3) beautify vacant lots (85%). The least supported action was the Gateway Sign action (47.8%), with comments indicating that there were already several signs in Downtown and that adding more signs could be distracting to drivers.

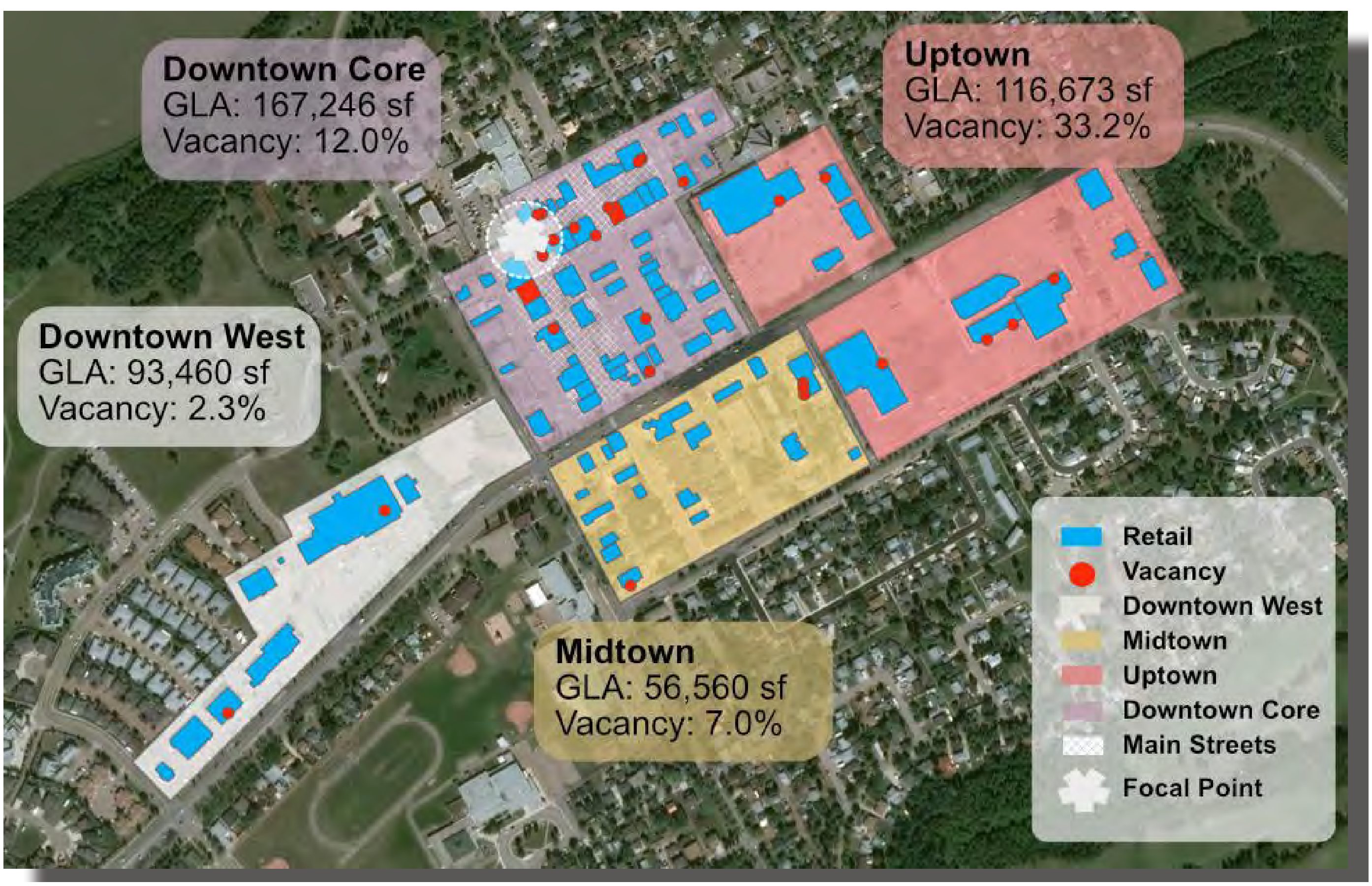
The questionnaire also asked respondents to list other possible actions. The top three suggestions were:

- Offer grants for sidewalk cafes and patios (71.4%)
- Remove barriers to restaurant patios (62.4%)
- Offer grants to create events (47.8%)

4 *Page 2, Vibrant Downtown: What We Heard Report, 2019*

Figure 2-7. Fort Saskatchewan Downtown Node Summary

*(Source: Retail Downtown Profile & Analysis, 2019) Key Planning Strategies and Colliers Int'l*



The engagements informed the creation of the **Downtown Action Plan** (2021). The Plan was intended to be a short-term plan (one to three year time span) with the ultimate goal of establishing "downtown as the community's gathering place where events, programming, and activities, [would] bring people together to socialize, celebrate, engage, and support the business community in the district"[5]. The Plan emphasized the aim of creating an "investment climate" (p. 13) to encourage business growth and expansion.

The Plan developed the following five key "initiatives" to achieve this overarching goal:

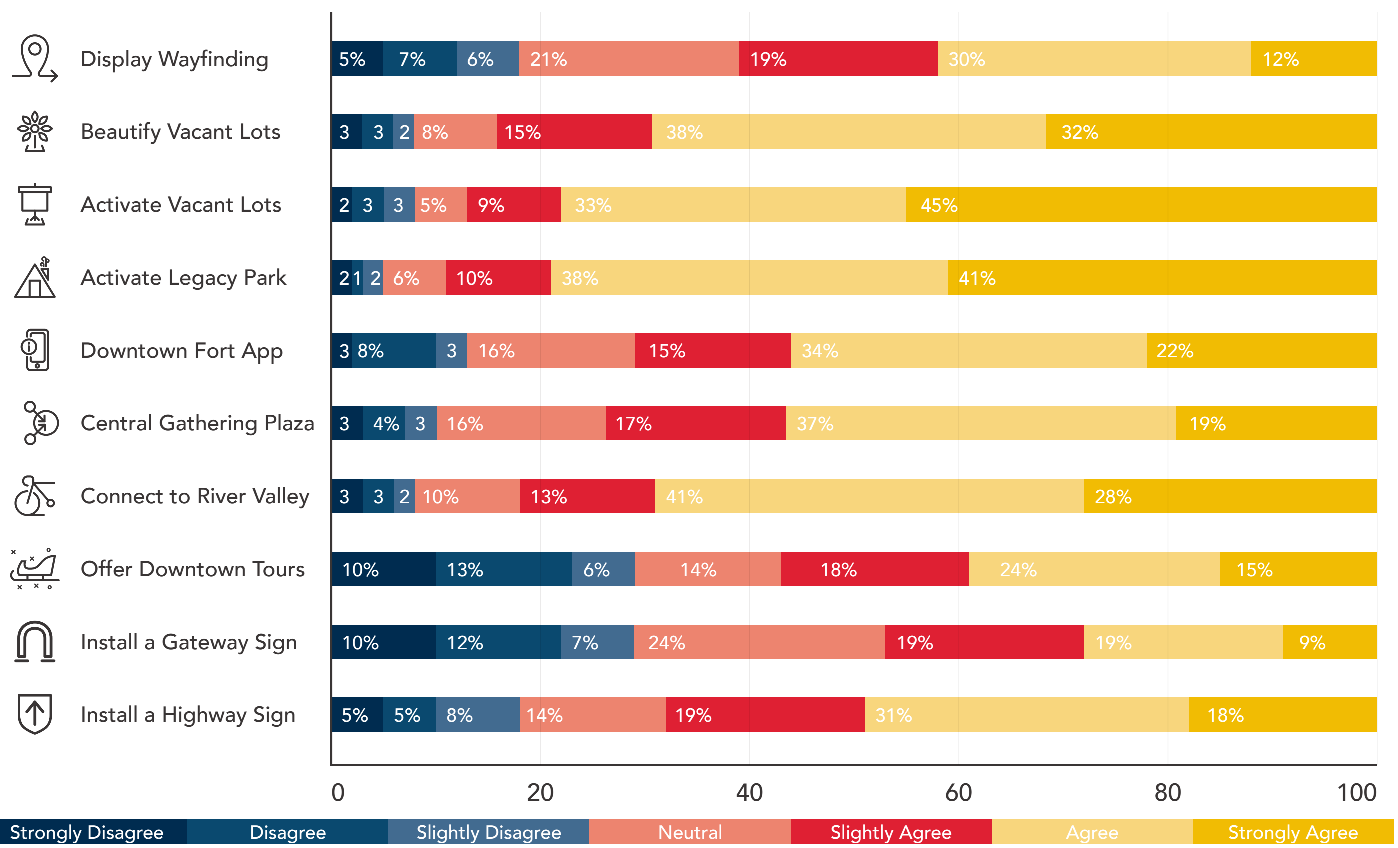
- ***Activate Vacant and Under-Utilized Spaces:*** The Plan recommended creating a central gathering space along 100 Avenue and investigating the existing city-owned lands that could be better utilized to create a more inviting Downtown community.
- ***Increase Marketing and Promotion of the Downtown:*** The Plan emphasized that the central pillar to the marketing strategy would be the "two-way communication and partnerships between the City and external stakeholders"[6].The Plan called for developing a campaign specific to Downtown Fort Saskatchewan.
- ***Enhance Programming and Events to Attract Visitors:*** By supporting community events in Downtown, the Plan aimed to encourage visitors to stay for extended periods of time. Recommendations included supporting event organizers by expanding eligibility of grant programs to private businesses that might be interested in hosting community events.
- ***Establish the Downtown as a Desirable Place to Invest and Develop:*** The Plan recommended offering a wider range of development incentives, such as grants and tax abatement. The Plan also recommended developing Downtown as a "Business Improvement Zone" (BIZ), aiming at streamlining development processes.
- ***Dedicate downtown resources***: in addition to the existing resources, the Plan recommended offering a temporary, two-year staff position that would support the growth of downtown and work on promoting the sense of local identity. The Plan indicated that additional staff would support establishing a Business Improvement Zone in Downtown Fort Saskatchewan.

5 *Page 3, Downtown Action Plan, 2021*

6 *Page 20, Downtown Action Plan, 2021*

Figure 2-8. Results of the Online Questionnaire

*(Source: Vibrant Downtown: What We Heard Report, 2019)*



While the City has been in the process of developing an official Strategy for Downtown Fort Saskatchewan, the City developed the **Downtown Development Strategy Planning** that aimed to guide the making of the Strategy. The table consisted of action items, task details, phase, proposed timeline, and departments that could collaborate for each action item.

Action items are based on three identified objectives, including:

- ***Increase Residential Density***: Tasks included reviewing the existing Downtown development incentives, including the Brownfield Tax Exemption Program and the Downtown Development Grant. Actions also included conducting interviews with various stakeholders, including the Municipality, developers, landlords, and brokers to gather the state of current residential development projects.
- ***Promoting the Development of Underutilized/ Vacant Spaces (Infill)***: Tasks included creating a development brief or "sell sheet" that would highlight the land use, height regulations, design considerations and available incentives. The Strategy also included working with realtors and property owners to promote the current incentive programs.
- ***Reducing Commercial Vacancy***: The table indicated that the City would complete a Market Gap Analysis to explore opportunities for potential industries in Downtown by June 2024. Other actions aimed at enhancing programs, incentives, and tenant contracts to reflect the needs of the community and business owners. Action items included investigating current short-term or temporary uses in commercial spaces as part of encouraging new business owners to start their businesses in Downtown Fort Saskatchewan.

## 2.5 Development Incentives

The **Brownfield Tax Exemption** fully exempts the municipal property tax for multi-unit and mixed-used residential development that were built on identified brownfield sites for a maximum 15 years. Brownfield sites are defined as "properties that are or could possibly be contaminated"[7]. To be eligible for the exemption, the building must be at least two storeys and must also meet the following conditions:

- Multi-unit development: six or more new dwelling units; or
- Mixed-use residential development: three or more new dwelling units above ground-floor commercial uses; or
- Minimum of 50% of the total area of the project would need to be dwelling units.

The **Downtown Development Grant** provides "3% of the eligible capital costs to create a mixed-use or multi-unit residential on properties in the downtown that would not qualify for the tax exemptions"[8]. Eligible capital costs would include professional fees, construction costs, and additional costs to make the space accessible for people with disabilities. The development needs to be a new construction and be completed in a timely manner. Dwelling unit requirements are the same as the Brownfield Tax Exemption.

The **Storefront Improvement Incentive** aims to encourage business owners and commercial property owners to invest for improved visual aesthetics in their properties, which can contribute to offering a more attractive Downtown. This grant provides up to 50% of eligible costs to a maximum allocation of $10,000 per application.

The **Shape Your Community Grant** is one of the community grants and programs that encourages residents to lead initiatives aimed at strengthening the community of Fort Saskatchewan. This grant supports small-scale, resident-led neighbourhood improvement projects that can include enhancing underutilized or vacant spaces, creating community gardens, and installing public art.

7 *Brownfield Tax Exemption, Fort Saskatchewan Official Website*
8 *Downtown Development Grant, Fort Saskatchewan Official Website*

## 2.6 Downtown Development

### *2.6.1 Ongoing Development*

**Fort Station**, the large former mall site Downtown, is continuing its redevelopment. A total of 94 residential units are currently under construction:

- Townhomes (44 units in 4 buildings)
- Apartments (54 units in 5 storey building with underground parking)

The **former hospital centre site** (9430 95th Ave) has yet to be developed but the initial proposal for a mixed-use development is targeting 10,000 sf of commercial space with 400+ residential units.

### *2.6.2 Development and Building Permits*

Building permit activity can provide empirical evidence of growth dynamics necessary to support commercial and retail opportunities. **Table 2-1** summarizes the number of development permits ("DP") and building permits ("BP") that have been issued from 2022 to 2024. For 2022, we also included the development permits that were categorized as "approved", withe assumption that those would be equivalent to the status of "permit issued" in 2023 and 2024.

From 2022 to 2024, 103 development permits and 63 building permits were issued. While the numbers of development permits issued have been consistent between 2022 and 2023, the number of issued building permits increased in 2023, with increased permits for residential and commercial developments.

Notably, the data showed that no commercial development permits have been issued since 2022.

Table 2-1. Downtown Fort Saskatchewan Development and Building Permit Counts (2022-2024)

*(Source: City of Fort Saskatchewan, table created by FBM)*

| | 2022 | | 2023 | | 2024 | | Total | |
|---|---|---|---|---|---|---|---|---|
| | DP | BP | DP | BP | DP | BP | DP | BP |
| Residential | 37 | 9 | 48 | 17 | 4 | 2 | **89** | **28** |
| Commercial | 14 | 8 | 0 | 19 | 0 | 2 | **14** | **29** |
| Institutional | 0 | 2 | 0 | 3 | 0 | 0 | **0** | **5** |
| High Density Multi-Family | 0 | 0 | 0 | 1 | 0 | 0 | **0** | **1** |
| **Total** | **51** | **19** | **48** | **40** | **4** | **4** | **103** | **63** |

## 2.7 Traffic Counts

Transportation attributes are an essential foundation to meeting demand in the retail sector. An understanding of these attributes can help create the necessary conditions for attracting and retaining businesses and residents to locate in a community.

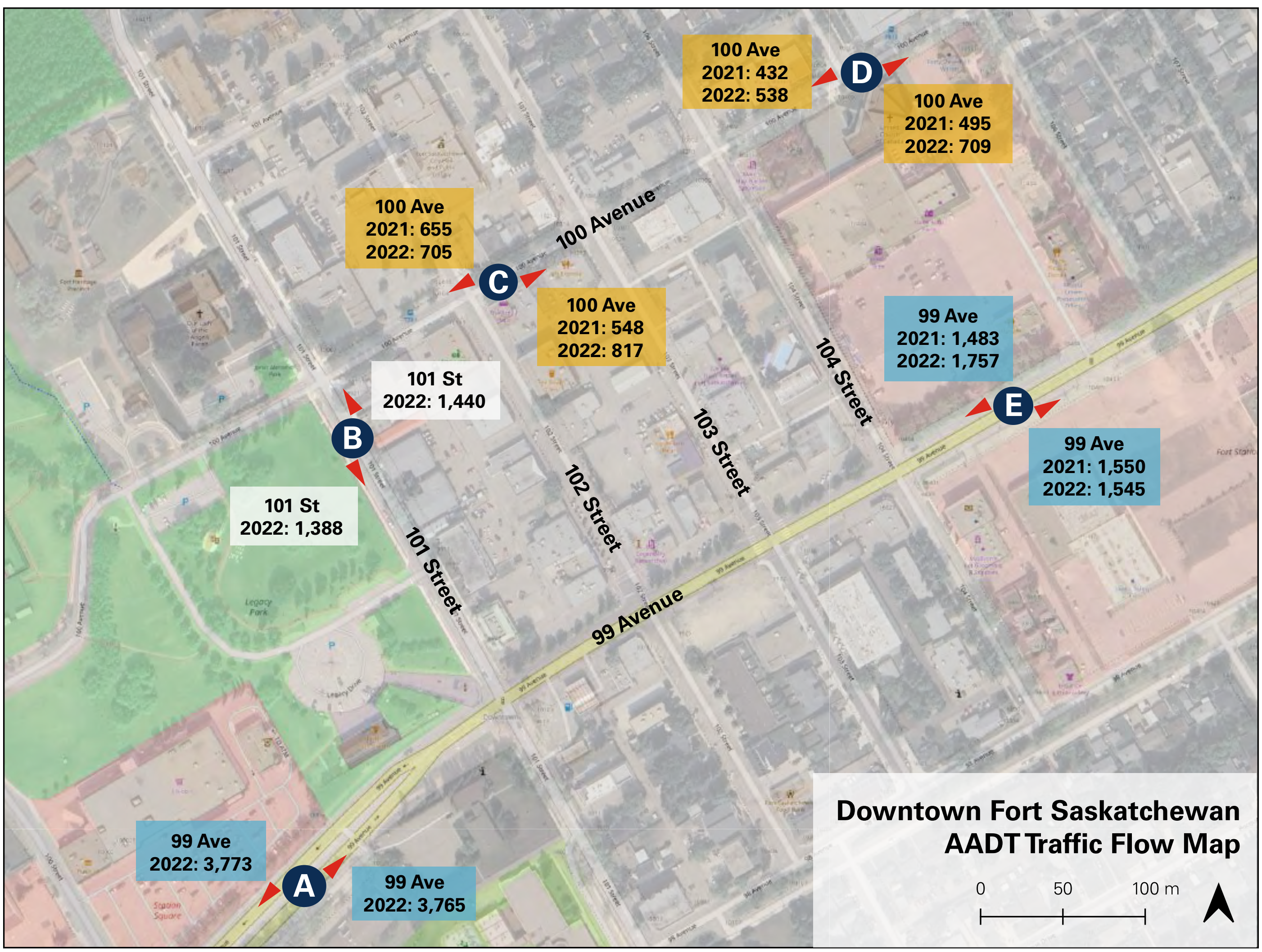
**Figure 2-9** represents traffic counts on major corridors within Downtown Fort Saskatchewan as provided by the City. Overall, the Annual Average Daily Traffic (AADT) volume in 2022 was higher than that in 2021. 99 Avenue had the largest traffic volume in Downtown, with slightly higher traffic volume towards the west. This likely reflects commuters traveling towards Edmonton. In contrast, 100 Avenue had larger traffic volume to the east toward the Downtown residential areas.

Given recent commercial redevelopment on the Fort Station site, it is anticipated that traffic volumes will continue to increase along 99 Ave (point E) in and around the downtown core.

The ease of access to/from the nearby industrial heartland suggests that the downtown is well-positioned to attract workers and residents alike for shops and services in less chaotic but walkable area with natural amenities for passive recreation.

Figure 2-9. Downtown Fort Saskatchewan Traffic Flow Map

*(Source: FBM with data from City of Fort Saskatchewan)*



# 3.0 Trade Area

## 3.1 Introduction

In order to create a framework for evaluating retail demand and subsequent gaps in the provision of shops and services, it is necessary to define and identify the trade areas from which Fort Saskatchewan's Downtown retail sales are most frequently and likely to be sourced. Trade areas recognize drive times, demographics, spending attributes and competition, which collectively portray the market to prospective tenants, developers and investors. Identifying the trade area is important for understanding the total market potential available to current and future retailers. The local and regional residential base has particular demographic and spending habits that provide insight as to the type of compatible retail tenants, 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.

As a first step, a retail trade area is delineated to identify the geographic region from which regular patronage could be expected, based on a series of boundary determinants. Major considerations in defining retail trade areas were applied to determine the most realistic trade areas as well as to help sensitize potential market share inputs of corresponding Trade Area retail spending.

Retail Trade Area determinants include:

1. Recent citywide retail market analysis as a foundation for the regional market draw to the city.
2. Transportation networks, including streets and highways, which affect access, drive times, commuting and employment distribution patterns;
3. Major infrastructure projects both planned or under development which could affect future travel patterns;
4. Overall community development vision, including an understanding of key nodes' characteristics;
5. Local and regional competitive environment, present and future;
6. Proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;
7. Significant natural and man-made barriers (e.g. water features, highways, industrial areas);
8. De facto barriers resulting from notable socioeconomic differentiation; and
9. Patterns of existing and future residential and commercial development.

For this particular study, three retail trade areas (**Figure 3-1**) are delineated: Downtown, City of Fort Saskatchewan and Regional Trade Area. The Downtown Walking Trade Area (DWTA) serves as the core trade area, which encompasses residents with a typical 10 minute walk of the centre of Downtown. The City of Fort Saskatchewan Trade Area (FSTA) serves as the Downtown's dominant trade area and encompasses all City residents. The Regional Trade Area (RTA) reflects Downtown's unique regional draw and the influence of competitive forces including Sherwood Park/Strathcona County and Edmonton, particularly the northeast. The RTA boundary aligns with the total trade area developed for the City of Fort Saskatchewan as part of the Retail Market and Gap Analysis Report (2019) and includes the communities of Redwater, Lamont, Bruderheim, New Lunnon, Gibbons, Coronado, and Amelia.

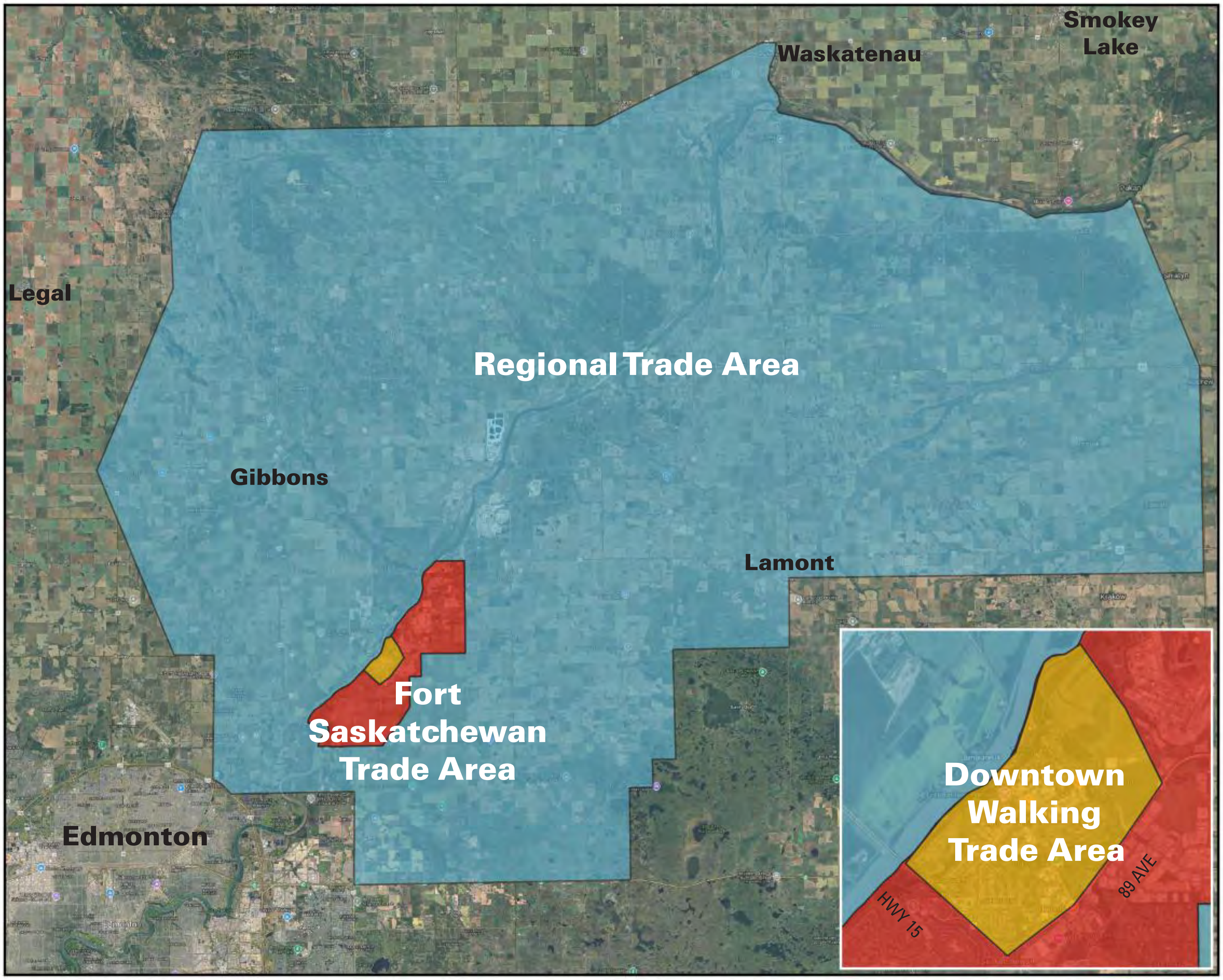
## 3.2 Demographics and Projections

The City of Fort Saskatchewan's Municipal Census Data (2024) was used to illustrate the most up-to-date demographic profile in Downtown and the City. The most recent Statistics Canada Census release (2021) as well as Manifold Data Mining Inc (2023/24), a leading supplier of demographic and consumer expenditure information, were used to tabulate population estimates and growth forecasts for the Regional Trade Area. These forecasts represent a snapshot based on demographic models and do not account for future planning realities that may influence population growth.

According to the 2024 Municipal Census data, the population of the DWTA is 4,433. Estimated for the year-end 2023, the population is projected to grow by 1.41% annually over the next five years (**Table 3-1**). The DWTA is consistently dissimilar to Alberta with respect to age distribution. The DWTA has a lower percentage of people under the age of 49 compared with the province (with the exception of the 20-34 cohort) and a significantly higher percentage of the population is over the age of 80 (**Table 3-2** and **Figure 3-2**). The average household income of the DWTA is $94,017 which is lower than the Alberta average of $131,803 (**Table 3-1**). The household income breakdown for the DWTA indicates this area has a slightly higher percentage of earners under $60,000 compared to the provincial average (**Table 3-3** and **Figure 3-3**). Of those over the age of 15 in the DWTA, 15.20% have an apprenticeship or trades certificate or diploma which is slightly higher than the Alberta average (8.71%).

Figure 3-1. Downtown Fort Saskatchewan Trade Area

*(Source: FBM with Google basemap)*




According to the 2024 Municipal Census data, the population of the City of Fort Saskatchewan Trade Area is 29,587 which includes the population of the DWTA[1]. Likewise, the Regional Trade Area includes both the DWTA and the FSTA with a total population of 54,660.

The FSTA population is projected to grow by a record 2.18% annually over the next five years compared to the RTA at 1.43% and the province at 0.97% (**Table 3-1**).

By age, the RTA population is most similar to the province while the FSTA has a slightly higher percentage of people in the 30-39 age cohort (**Table 3-2** and **Figure 3-2**).

Of those over the age of 15 in the FSTA and the RTA, 41.51% and 40.34% respectively have a post-secondary certificate or diploma below the bachelor level.

The average household income of both the FSTA and RTA is higher than both the provincial average ($131,803) and the DWTA ($92,756) at $138,744 and $133,222 respectively (**Table 3-1**).

The household income breakdown for the FSTA and the RTA are substantially similar with a significantly lower percentage of households earning under $15,000 and slightly higher percentage of households earning $15,000-$45,000 when compared to Alberta (**Table 3-3** and **Figure 3-3**).

1 *City of Fort Saskatchewan (2024). Municipal Census Report.*

## Table 3-1. Trade Area Summary Table

| Index | Description |
|---|---|
| >= 180 | Extremely High |
| >=110 and <180 | High |
| >=90 and <110 | Similar |
| >=50 and <90 | Low |
| <50 | Extremely Low |

*(Source: FBM & Manifold Data Mining Inc.)*
*Note: the numbers for Downtown's population age group are estimated based on the total population from the City of Fort Saskatchewan's Municipal Census Report (2024) and age breakdown percentage from Manifold Data Mining Inc.*

| | Benchmark PR: Alberta, AB | | Downtown Walking Trade Area | | | City of Fort Saskatchewan Trade Area | | | Regional Trade Area | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Attribute** | value | percent | value | percent | index | value | percent | index | value | percent | index |
| **SUMMARY** | | | | | | | | | | | |
| Total population | 4,651,538 | | 4,433 | | | 29,857 | | | 54,660 | | |
| Total population age 15 and over | 3,817,720 | | 3,904 | | | 23,838 | | | 44,595 | | |
| Total number of private households | 1,782,214 | | 2,071 | | | 11,377 | | | 20,579 | | |
| Average number of persons in private households | 2.55 | | 2.14 | | 84 | 2.57 | | 101 | 2.60 | | 102 |
| **POPULATION AGE** | | | | | | | | | | | |
| Population age 0-14 | 834,722 | 17.95% | 530 | 11.95% | 67 | 6,019 | 20.16% | 112 | 10,065 | 18.41% | 103 |
| Population age 15-24 | 557,719 | 11.99% | 434 | 9.80% | 82 | 3,368 | 11.24% | 94 | 6,178 | 11.30% | 94 |
| Population age 25-34 | 657,223 | 14.13% | 632 | 14.25% | 101 | 4,440 | 14.83% | 105 | 7,626 | 13.95% | 99 |
| Population age 35-44 | 716,356 | 15.40% | 549 | 12.39% | 80 | 5,055 | 16.87% | 110 | 8,286 | 15.16% | 98 |
| Population age 45-54 | 585,733 | 12.59% | 465 | 10.50% | 83 | 3,592 | 11.99% | 95 | 6,548 | 11.98% | 95 |
| Population age 55-64 | 563,244 | 12.11% | 619 | 13.97% | 115 | 3,302 | 11.03% | 91 | 7,000 | 12.81% | 106 |
| Population age 65+ | 732,739 | 15.75% | 1,204 | 27.15% | 172 | 4,084 | 13.68% | 87 | 8,956 | 16.39% | 104 |
| **EDUCATION** | | | | | | | | | | | |
| Total population aged 15 years and over by highest certificate, diploma, or degree | 3,816,815 | | 3,904 | | | 23,838 | | | 44,595 | | |
| No certificate, diploma, or degree | 594,252 | 15.57% | 580 | 14.85% | 95 | 2,839 | 11.91% | 76 | 6,317 | 14.17% | 91 |
| High school diploma or equivalent | 1,097,589 | 28.76% | 1,390 | 35.60% | 124 | 7,418 | 31.12% | 108 | 14,416 | 32.33% | 112 |
| Post-secondary certificate, diploma, or degree | 2,124,975 | 55.67% | 1,934 | 49.54% | 89 | 13,578 | 56.96% | 102 | 23,862 | 53.51% | 96 |
| Postsecondary certificate or diploma below bachelor level | 1,145,139 | 30.00% | 1,419 | 36.35% | 121 | 9,895 | 41.51% | 138 | 17,989 | 40.34% | 134 |
| Apprenticeship or trades certificate or diploma | 332,377 | 8.71% | 593 | 15.20% | 175 | 3,640 | 15.27% | 175 | 7,064 | 15.84% | 182 |
| College, CEGEP or other non-university certificate or diploma | 689,881 | 18.08% | 719 | 18.43% | 102 | 5,514 | 23.13% | 128 | 9,650 | 21.64% | 120 |
| University certificate or diploma below bachelor level | 122,881 | 3.22% | 107 | 2.73% | 85 | 741 | 3.11% | 97 | 1,275 | 2.86% | 89 |
| University certificate, diploma, or degree at bachelor level or above | 979,836 | 25.67% | 515 | 13.19% | 51 | 3,685 | 15.46% | 60 | 5,872 | 13.17% | 51 |
| Bachelor's degree | 683,367 | 17.90% | 384 | 9.83% | 55 | 2,923 | 12.26% | 68 | 4,680 | 10.49% | 59 |
| **INCOME** | | | | | | | | | | | |
| Average family income $ | $154,623 | | $117,715 | | 76 | $159,256 | | 103 | $151,844 | | 98 |
| Average household income $ | $131,803 | | $94,017 | | 71 | $138,744 | | 105 | $133,222 | | 101 |
| Average income population age 15 and over ($) | $66,723 | | $53,343 | | 80 | $72,040 | | 108 | $67,989 | | 102 |
| Population with income Under $10,000 (including loss) | 267,179 | 7.00% | 226 | 5.80% | 83 | 1,331 | 5.58% | 80 | 2,992 | 6.71% | 96 |
| Population with income $10,000 to $19,999 | 349,804 | 9.17% | 358 | 9.17% | 100 | 1,744 | 7.31% | 80 | 3,637 | 8.16% | 89 |
| Population with income $20,000 to $29,999 | 534,160 | 14.00% | 615 | 15.76% | 113 | 2,575 | 10.80% | 77 | 5,495 | 12.32% | 88 |
| Population with income $30,000 to $39,999 | 447,081 | 11.71% | 566 | 14.50% | 124 | 2,543 | 10.66% | 91 | 4,848 | 10.87% | 93 |
| Population with income $40,000 to $49,999 | 383,857 | 10.06% | 466 | 11.94% | 119 | 2,343 | 9.82% | 98 | 4,236 | 9.50% | 94 |
| Population with income $50,000 to $59,999 | 321,454 | 8.42% | 361 | 9.24% | 110 | 2,006 | 8.41% | 100 | 3,693 | 8.28% | 98 |
| Population with income $60,000 to $69,999 | 267,762 | 7.02% | 240 | 6.16% | 88 | 1,700 | 7.13% | 102 | 3,136 | 7.03% | 100 |
| Population with income $70,000 to $79,999 | 216,784 | 5.68% | 213 | 5.46% | 96 | 1,596 | 6.69% | 118 | 2,891 | 6.48% | 114 |
| Population with income $80,000 to $89,999 | 170,936 | 4.48% | 162 | 4.16% | 93 | 1,318 | 5.53% | 123 | 2,316 | 5.19% | 116 |
| Population with income $90,000 to $99,999 | 143,911 | 3.77% | 150 | 3.83% | 102 | 1,075 | 4.51% | 120 | 1,856 | 4.16% | 110 |
| Population with income $100,000 and over | 530,405 | 13.90% | 383 | 9.80% | 71 | 4,583 | 19.22% | 138 | 7,514 | 16.85% | 121 |
| Population with income $100,000 to $149,999 | 288,547 | 7.56% | 239 | 6.12% | 81 | 2,322 | 9.74% | 129 | 4,308 | 9.66% | 128 |
| Population with income $150,000 and over | 241,858 | 6.34% | 144 | 3.68% | 58 | 2,261 | 9.48% | 150 | 3,206 | 7.19% | 113 |
| **PROJECTIONS** | | | | | | | | | | | |
| Annual population growth in the period: Next 3 years | | 0.98% | | 0.89% | 91 | | 2.21% | 226 | | 0.90% | 92 |
| Annual household growth in the period: Next 3 years | | 1.24% | | 0.70% | 56 | | 2.12% | 171 | | 0.95% | 77 |
| Annual population growth in the period: Next 5 years | | 0.97% | | 1.41% | 145 | | 2.18% | 225 | | 1.43% | 147 |
| Annual household growth in the period: Next 5 years | | 1.22% | | 1.15% | 94 | | 2.10% | 172 | | 1.54% | 126 |
| Annual population growth in the period: 5 to 10 years from current year | | 0.92% | | 1.32% | 143 | | 2.03% | 221 | | 1.35% | 147 |
| Annual household growth in the period: 5 to 10 years from current year | | 1.13% | | 1.08% | 96 | | 1.96% | 173 | | 1.45% | 128 |
| **POPULATION GROWTH** | | | | | | | | | | | |
| Current year total population | 4,651,538 | | 4,433 | | | 29,857 | | | 54,660 | | |
| 3-Year Projections - Total population | 4,790,192 | | 4,635 | | | 31,884 | | | 57,184 | | |
| 5-Year Projections - Total population | 4,882,352 | | 4,758 | | | 33,259 | | | 58,732 | | |
| 10-Year Projections - Total population | 5,111,028 | | 5,081 | | | 36,773 | | | 62,865 | | |
| **HOUSEHOLD INCOME GROWTH** | | | | | | | | | | | |
| Current year average household income | $131,803 | | $94,017 | | 71 | $138,744 | | 105 | $133,222 | | 101 |
| 3-Year Projections - Average household income | $137,762 | | $97,829 | | 71 | $144,088 | | 105 | $133,243 | | 97 |
| 5-Year Projections - Average household income | $146,237 | | $103,912 | | 71 | $151,058 | | 103 | $140,653 | | 96 |
| 10-Year Projections - Average household income | $161,354 | | $115,026 | | 71 | $163,273 | | 101 | $153,703 | | 95 |

## Table 3-2. Trade Area Population Breakdown

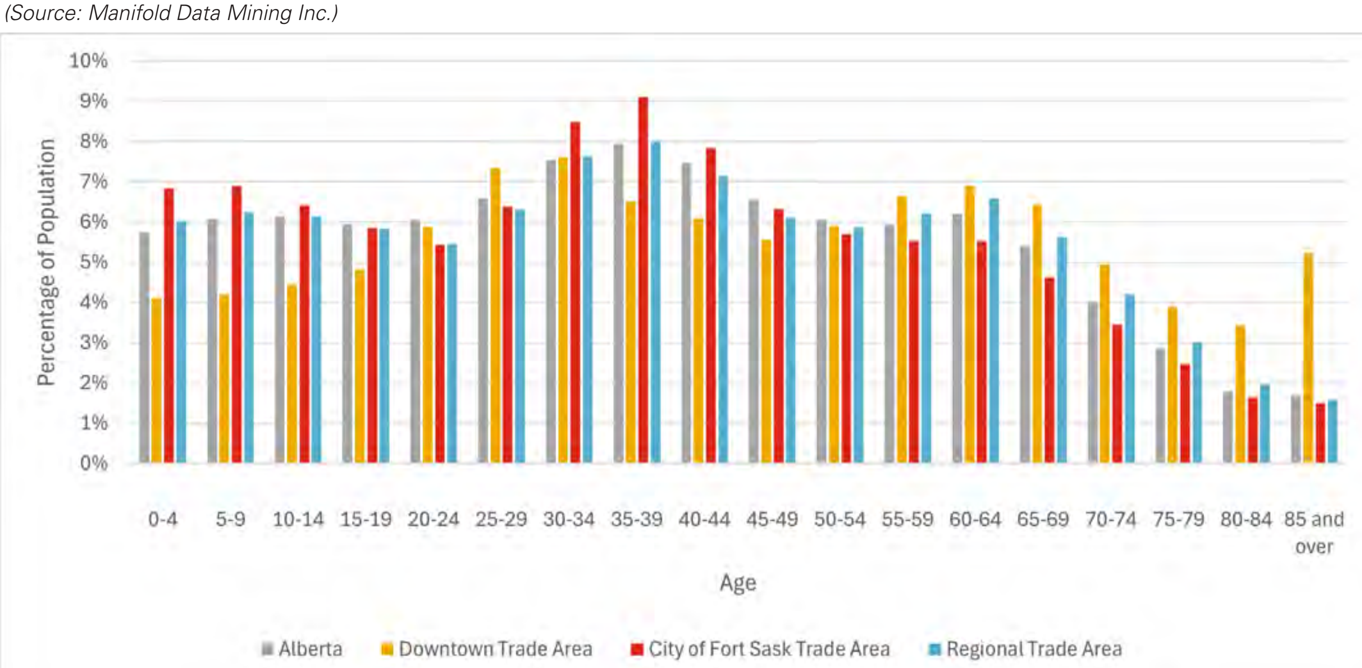
*(Source: FBM & Manifold Data Mining Inc.)*
*Note: the numbers for Downtown's population age group are estimated based on the total population from the City of Fort Saskatchewan's Municipal Census Report (2024) and age breakdown percentage from Manifold Data Mining Inc.*

| Index | Description |
|---|---|
| >= 180 | Extremely High |
| >=110 and <180 | High |
| >=90 and <110 | Similar |
| >=50 and <90 | Low |
| <50 | Extremely Low |

| Attribute | Benchmark PR: Alberta, AB | | Downtown Walking Trade Area | | | City of Fort Saskatchewan Trade Area | | | Regional Trade Area | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | value | percent | value | percent | index | value | percent | index | value | percent | index |
| **POPULATION AGE GROUP** | | | | | | | | | | | |
| Total population by age groups | 4,651,538 | | 4,433 | | | 29,857 | | | 54,660 | | |
| 0-14 | 834,722 | 17.95% | 530 | 11.95% | 67 | 6,019 | 20.16% | 112 | 10,065 | 18.41% | 103 |
| 0-4 | 267,009 | 5.74% | 179 | 4.03% | 70 | 2,042 | 6.84% | 119 | 3,297 | 6.03% | 105 |
| 5-9 | 282,681 | 6.08% | 178 | 4.01% | 66 | 2,057 | 6.89% | 113 | 3,410 | 6.24% | 103 |
| 10-14 | 285,032 | 6.13% | 173 | 3.90% | 64 | 1,917 | 6.42% | 105 | 3,357 | 6.14% | 100 |
| 15-64 | 3,084,077 | 66.30% | 2,700 | 60.90% | 92 | 19,753 | 66.16% | 100 | 35,639 | 65.20% | 98 |
| 15-19 | 276,466 | 5.94% | 191 | 4.31% | 73 | 1,747 | 5.85% | 98 | 3,193 | 5.84% | 98 |
| 20-24 | 281,964 | 6.06% | 243 | 5.49% | 91 | 1,621 | 5.43% | 90 | 2,984 | 5.46% | 90 |
| 25-29 | 307,072 | 6.60% | 306 | 6.91% | 105 | 1,905 | 6.38% | 97 | 3,452 | 6.31% | 96 |
| 30-34 | 350,841 | 7.54% | 325 | 7.34% | 97 | 2,535 | 8.49% | 113 | 4,175 | 7.64% | 101 |
| 35-39 | 369,614 | 7.95% | 291 | 6.56% | 83 | 2,717 | 9.10% | 114 | 4,378 | 8.01% | 101 |
| 40-44 | 347,492 | 7.47% | 258 | 5.83% | 78 | 2,338 | 7.83% | 105 | 3,908 | 7.15% | 96 |
| 45-49 | 304,685 | 6.55% | 224 | 5.06% | 77 | 1,890 | 6.33% | 97 | 3,339 | 6.11% | 93 |
| 50-54 | 281,780 | 6.06% | 241 | 5.44% | 90 | 1,702 | 5.70% | 94 | 3,210 | 5.87% | 97 |
| 55-59 | 275,971 | 5.93% | 301 | 6.78% | 114 | 1,651 | 5.53% | 93 | 3,398 | 6.22% | 105 |
| 60-64 | 288,192 | 6.20% | 319 | 7.19% | 116 | 1,651 | 5.53% | 89 | 3,602 | 6.59% | 106 |
| 65 and over | 732,739 | 15.75% | 1,204 | 27.15% | 172 | 4,084 | 13.68% | 87 | 8,956 | 16.39% | 104 |
| 65-69 | 251,240 | 5.40% | 299 | 6.74% | 125 | 1,379 | 4.62% | 86 | 3,074 | 5.62% | 104 |
| 70-74 | 186,841 | 4.02% | 242 | 5.47% | 136 | 1,030 | 3.45% | 86 | 2,297 | 4.20% | 104 |
| 75-79 | 133,072 | 2.86% | 210 | 4.73% | 165 | 740 | 2.48% | 87 | 1,646 | 3.01% | 105 |
| 80-84 | 83,024 | 1.79% | 196 | 4.43% | 247 | 490 | 1.64% | 92 | 1,074 | 1.96% | 109 |
| 85 and over | 78,561 | 1.69% | 256 | 5.77% | 341 | 448 | 1.50% | 89 | 864 | 1.58% | 93 |
| 85-89 | 50,167 | 1.08% | 159 | 3.59% | 332 | 293 | 0.98% | 91 | 621 | 1.14% | 106 |
| 90-94 | 22,259 | 0.48% | 39 | 0.88% | 183 | 84 | 0.28% | 58 | 142 | 0.26% | 54 |
| 95-99 | 5,465 | 0.12% | 58 | 1.30% | 1,083 | 72 | 0.24% | 200 | 92 | 0.17% | 142 |
| 100 and over | 670 | 0.01% | 0 | 0.00% | 0 | 0 | 0.00% | 0 | 9 | 0.02% | 200 |
| Average age of total population | 39.50 | | 46.80 | | 118 | 37.90 | | 96 | 39.80 | | 101 |
| Median age of total population | 38.70 | | 47.20 | | 122 | 37.00 | | 96 | 40.20 | | 104 |

## Figure 3-2. Population Breakdown

*(Source: Manifold Data Mining Inc.)*



| Index | Description |
|---|---|
| >= 180 | Extremely High |
| >=110 and <180 | High |
| >=90 and <110 | Similar |
| >=50 and <90 | Low |
| <50 | Extremely Low |

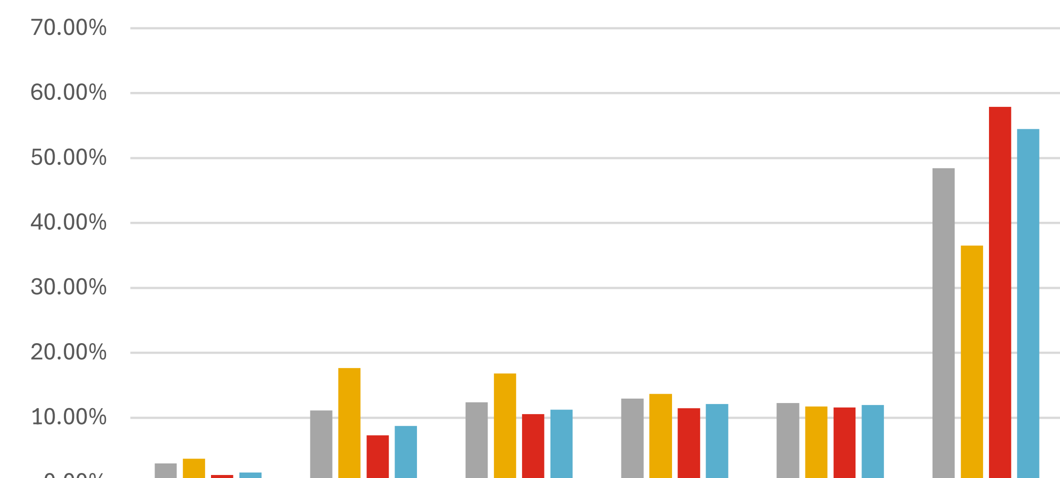
## Table 3-3. Household Income Breakdown

*(Source: FBM & Manifold Data Mining Inc.)*

| Attribute | Benchmark PR: Alberta, AB | | Downtown Walking Trade Area | | | City of Fort Saskatchewan Trade Area | | | Regional Trade Area | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | value | percent | value | percent | index | value | percent | index | value | percent | index |
| **HOUSEHOLD INCOME** | | | | | | | | | | | |
| Total number of households | 1,782,214 | | 2,295 | | | 11,377 | | | 20,579 | | |
| Average household income $ | $131,803.00 | | $94,017.00 | | 71 | $138,744.00 | | 105 | $133,222.00 | | 101 |
| Median household income $ | $103,851.00 | | $81,524.00 | | 79 | $127,970.00 | | 123 | $116,718.00 | | 112 |
| Household with income under $5,000 | 13,079 | 0.73% | 1 | 0.04% | 5 | 26 | 0.23% | 32 | 66 | 0.32% | 44 |
| Household with income $5,000 to $9,999 | 8,791 | 0.49% | 7 | 0.30% | 61 | 17 | 0.15% | 31 | 27 | 0.13% | 27 |
| Household with income $10,000 to $14,999 | 11,861 | 0.67% | 25 | 1.07% | 160 | 24 | 0.21% | 31 | 59 | 0.29% | 43 |
| Household with income $15,000 to $19,999 | 18,544 | 1.04% | 52 | 2.28% | 219 | 67 | 0.59% | 57 | 165 | 0.80% | 77 |
| Household with income $20,000 to $24,999 | 47,057 | 2.64% | 98 | 4.28% | 162 | 156 | 1.37% | 52 | 400 | 1.94% | 73 |
| Household with income $25,000 to $29,999 | 53,619 | 3.01% | 117 | 5.10% | 169 | 245 | 2.15% | 71 | 554 | 2.69% | 89 |
| Household with income $30,000 to $34,999 | 46,326 | 2.60% | 94 | 4.08% | 157 | 189 | 1.66% | 64 | 391 | 1.90% | 73 |
| Household with income $35,000 to $39,999 | 51,195 | 2.87% | 95 | 4.15% | 145 | 240 | 2.11% | 74 | 457 | 2.22% | 77 |
| Household with income $40,000 to $44,999 | 56,194 | 3.15% | 112 | 4.88% | 155 | 322 | 2.83% | 90 | 567 | 2.76% | 88 |
| Household with income $45,000 to $49,999 | 58,133 | 3.26% | 104 | 4.52% | 139 | 279 | 2.45% | 75 | 614 | 2.99% | 92 |
| Household with income $50,000 to $59,999 | 105,625 | 5.93% | 169 | 7.38% | 124 | 601 | 5.28% | 89 | 1,128 | 5.48% | 92 |
| Household with income $60,000 to $69,999 | 115,870 | 6.50% | 157 | 6.85% | 105 | 612 | 5.38% | 83 | 1,202 | 5.84% | 90 |
| Household with income $70,000 to $79,999 | 114,718 | 6.44% | 156 | 6.81% | 106 | 694 | 6.10% | 95 | 1,287 | 6.25% | 97 |
| Household with income $80,000 to $89,999 | 110,012 | 6.17% | 136 | 5.92% | 96 | 687 | 6.04% | 98 | 1,230 | 5.98% | 97 |
| Household with income $90,000 to $99,999 | 107,953 | 6.06% | 134 | 5.82% | 96 | 633 | 5.56% | 92 | 1,224 | 5.95% | 98 |
| Household with income $100,000 and over | 863,238 | 48.44% | 838 | 36.51% | 75 | 6,585 | 57.88% | 119 | 11,208 | 54.46% | 112 |
| Household with income $100,000 to $124,999 | 206,288 | 11.58% | 256 | 11.18% | 97 | 1,434 | 12.60% | 109 | 2,499 | 12.14% | 105 |
| Household with income $125,000 to $149,999 | 179,676 | 10.08% | 238 | 10.38% | 103 | 1,362 | 11.97% | 119 | 2,385 | 11.59% | 115 |
| Household with income $150,000 to $199,999 | 212,363 | 11.92% | 173 | 7.56% | 63 | 1,750 | 15.38% | 129 | 2,955 | 14.36% | 120 |
| Household with income $200,000 and over | 264,911 | 14.86% | 170 | 7.39% | 50 | 2,041 | 17.94% | 121 | 3,369 | 16.37% | 110 |

## Figure 3-3. Household Income Breakdown

*(Source: FBM & Manifold Data Mining Inc.)*




| | Under $19,999 | $20,000 to $39,999 | $40,000 to $59,999 | $60,000 to $79,999 | $80,000 to $99,999 | Above $100,000 |
|---|---|---|---|---|---|---|
| Alberta | 2.93% | 11.12% | 12.34% | 12.94% | 12.23% | 48.44% |
| Downtown Walking Trade Area | 3.69% | 17.61% | 16.78% | 13.66% | 11.74% | 36.51% |
| City of Fort Saskatchewan Trade Area | 1.18% | 7.29% | 10.56% | 11.48% | 11.60% | 57.88% |
| Regional Trade Area | 1.54% | 8.75% | 11.23% | 12.09% | 11.93% | 54.46% |

| Index | Description |
|---|---|
| >= 180 | Extremely High |
| >=110 and <180 | High |
| >=90 and <110 | Similar |
| >=50 and <90 | Low |
| <50 | Extremely Low |

Table 3-4. Trade Area Canacode Lifestyle Clusters

*(Source: FBM & Manifold Data Mining Inc.)*

| | Benchmark PR: Alberta, AB | | Downtown Walking Trade Area | | | City of Fort Saskatchewan Trade Area | | | Regional Trade Area | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Attribute** | value | percent | value | percent | index | value | percent | index | value | percent | index |
| A: AFFLUENTS | 118,911 | 6.63% | 10 | 0.42% | 6 | 221 | 1.95% | 29 | 342 | 1.66% | 25 |
| B: ELITE PROFESSIONALS | 205,144 | 11.44% | 64 | 2.80% | 24 | 1,596 | 14.13% | 124 | 1,794 | 8.72% | 76 |
| C: ETHNIC CRUISERS | 68,480 | 3.82% | 0 | 0.00% | 0 | 1,485 | 13.15% | 344 | 1,496 | 7.27% | 190 |
| D: NEST BUILDERS | 162,597 | 9.07% | 486 | 21.17% | 233 | 3,560 | 31.52% | 348 | 3,865 | 18.78% | 207 |
| E: BUY ME A NEW HOME | 274,614 | 15.31% | 106 | 4.62% | 30 | 1,936 | 17.14% | 112 | 2,691 | 13.08% | 85 |
| F: EMPTY NESTERS | 91,740 | 5.12% | 355 | 15.46% | 302 | 355 | 3.14% | 61 | 1,241 | 6.03% | 118 |
| G: UP THE LADDER | 274,370 | 15.30% | 516 | 22.48% | 147 | 782 | 6.92% | 45 | 1,422 | 6.91% | 45 |
| H: HIGH TRADES | 51,051 | 2.85% | 60 | 2.60% | 91 | 79 | 0.70% | 25 | 90 | 0.44% | 15 |
| I: URBAN LIFE IN SMALL TOWNS | 161,120 | 8.99% | 0 | 0.00% | 0 | 0 | 0.00% | 0 | 709 | 3.45% | 38 |
| J: JOYFUL COUNTRY | 72,301 | 4.03% | 0 | 0.00% | 0 | 0 | 0.00% | 0 | 5,512 | 26.78% | 665 |
| K: RURAL HANDYMEN | 29,472 | 1.64% | 0 | 0.00% | 0 | 0 | 0.00% | 0 | 132 | 0.64% | 39 |
| L: COMFORTABLE APARTMENT DWELLERS | 171,884 | 9.59% | 370 | 16.11% | 168 | 852 | 7.54% | 79 | 852 | 4.14% | 43 |
| M: SINGLES | 37,108 | 2.07% | 120 | 5.22% | 252 | 171 | 1.51% | 73 | 172 | 0.83% | 40 |
| N: NEW CANADIANS | 36,424 | 2.03% | 102 | 4.46% | 220 | 155 | 1.37% | 67 | 155 | 0.75% | 37 |
| O: RENTERS | 15,815 | 0.88% | 31 | 1.33% | 151 | 31 | 0.27% | 31 | 31 | 0.15% | 17 |
| P: ONE PARENT FAMILIES | 13,003 | 0.73% | 0 | 0.00% | 0 | 0 | 0.00% | 0 | 0 | 0.00% | 0 |
| Q: THRIFTY | 9,152 | 0.51% | 76 | 3.33% | 653 | 76 | 0.68% | 133 | 76 | 0.37% | 73 |

### 3.2.1 CanaCode Lifestyle Clusters

CanaCode Lifestyles is a customer segmentation that combines demographic, household spending, consumer lifestyle, attitude and behavioural databases, with a view of a target market's choices, preferences and shopping patterns. The two-tier lifestyle segmentation system works at the six-digit postal code level and classifies Canada's consumer landscape into 18 distinct lifestyle segments.

The purpose of these Lifestyle Clusters is to provide the reader/audience with a sense of the profile and preferences of Downtown Fort Saskatchewan's predominant trade area resident consumer. This provides insights into the types of industries and businesses that are likely to be attracted to and are most compatible given the demographic composition.

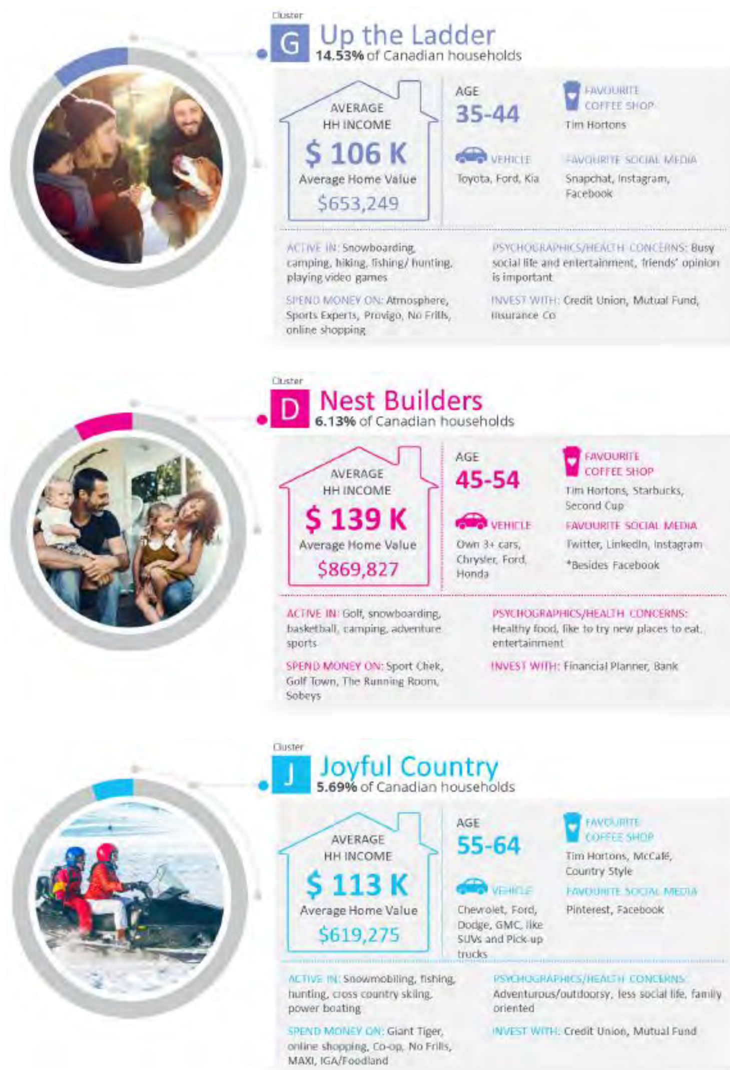
The dominant CanaCode Lifestyle Cluster in the DWTA is "G: Up the Ladder" at 22.48% of the Trade Area population compared (**Table 3-4**). In the FSTA, the dominant Cluster is "D: Nest Builders" (31.52%) and in the RTA it's "J: Joyful Country" (26.78%).

**Figure 3-3** illustrates demographic traits for typical Canadian households. While factors such as house values and activities can be different depending on economic and geographic contexts, these descriptions offer a general sense of consumers' spending habits and lifestyle in the trade area's.

A full listing of the CanaCode Lifestyle Clusters can be viewed at www.polarisintelligence.com/canacode/

Figure 3-4. Dominant CanaCode Lifestyle Clusters

*(Source: Manifold Data Mining Inc.)*



## 3.3 Summary of Employment & Labour

**Table 3-5** provides a summary of the estimated 2023 labour force profile for Downtown Fort Saskatchewan's three trade areas. Across the three trade areas, there is a slightly lower percentage of self-employed workers compared to the provincial average. Within the DWTA, there is a significantly lower percentage of workers (3.91%) using their home as a place of work compared to the province (9.24%). Both the FSTA and RTA are slightly lower than the province at 6.64% and 6.9% respectively.

Within all trade areas, vehicles are the primary mode of transportation amongst commuters (**Figure 3-5**). However, commuting by walking is significantly higher in the DWTA (6.44%) compared to the province (3.35%) which reflects the walkability of the Downtown Trade Area. Public transit use is significantly lower than the provincial average (4.74%) across the trade areas (DWTA 0.85%, FTSA 0.97% and RTA 0.72%).

Of those aged 15 and older who commute to work, there is a significantly higher percentage of workers who commute to a different census subdivision (CSD) within the census division (CD) that they live in. The provincial average is 15.54% while in the DWTA it is 34.32%, within the FSTA it is 34.23% and within the RTA it is 34.76%. Fort Saskatchewan shares a CD with the City of Edmonton and surrounding area.

These results suggest many workers living in the three identified trade areas commute to Edmonton regularly for work. According to **Table 3-6**, the most prominent industries within the DWTA are Retail Trade and Construction representing 14.85% (361workers) and 14.5% (352 workers) of the labour force population respectively. These industries are prominent in the FSTA and the RTA as well, however Manufacturing in the FSTA is significantly higher than the provincial average (5.2%) at 9.55%. The Professional, scientific and technical services industry is significantly lower in DWTA (3.13%) and slightly lower in the FSTA (4.59%) and RTA (4.24%) compared with the province (7.74%).

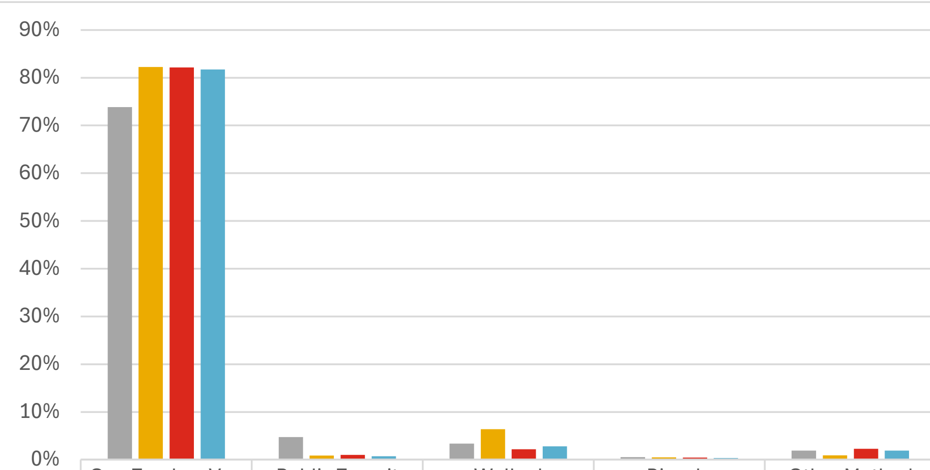
Prominent occupations in the trade areas include:

- Sales & service occupations
  - » DWTA: 29.09% / 707 workers
  - » FSTA: 21.87% / 3,783 workers
  - » RTA: 20.77% / 6,397 workers
- Trades, transport & equipment operators and related occupations
  - » DWTA: 28.09% / 682 workers
  - » FSTA: 25.39% / 4,392 workers
  - » RTA: 27.27% / 8,401 workers

These findings reflect Downtown and the City's positioning as a commercial, civic and recreational hub and the area's proximity to the Industrial Heartland.

Figure 3-5. Mode of Transportation to Work

*(Source: FBM & Manifold Data Mining Inc.)*




| | Car, Truck or Van | Public Transit | Walked | Bicycle | Other Method |
|---|---|---|---|---|---|
| Alberta | 73.83% | 4.74% | 3.35% | 0.56% | 1.91% |
| Downtown Walking Trade Area | 82.29% | 0.85% | 6.44% | 0.47% | 0.91% |
| City of Fort Saskatchewan Trade Area | 82.14% | 0.97% | 2.20% | 0.44% | 2.25% |
| Regional Trade Area | 81.77% | 0.72% | 2.76% | 0.34% | 1.89% |

## Industrial Heartland Direct and Indirect Benefits

With an estimated 8,000 direct and 30,000 indirect jobs (Alberta's Industrial Heartland Association, July 8, 2022), the industrial workforce in the "industrial heartland" around Fort Saskatchewan, Alberta, can play a significant role in boosting the city's downtown area and further supporting its vitalization strategies.

The industrial workforce, often employed in well-paying jobs in sectors like petrochemicals, energy, and manufacturing, brings considerable disposable income. These workers can stimulate the downtown economy by patronizing local restaurants, shops, and services, such as gyms, salons, and day-to-day shopping items. With thousands of workers commuting to or living in Fort Saskatchewan, the "miscellaneous inflow" demand for goods and services naturally increases. This can lead to the growth of local businesses, creation of new ones, and a diverse retail environment. Moreover, the increased economic activity downtown driven by the industrial workforce creates more job opportunities in sectors like retail, hospitality, and services. This could absorb a portion of the local population, providing employment opportunities for those who may not work in the industrial sectors.

As more workers settle in or near Fort Saskatchewan, the demand for housing can rise. This may lead to an increase in residential developments or the revitalization of existing properties downtown. These workers are likely to seek proximity to amenities and services offered in the downtown core, leading to the growth of more mixed-use or downtown infill-type developments.

As the workforce grows and diversifies, so too does the demand for various cultural, social, and recreational amenities. The city's downtown can benefit from this by expanding cultural offerings such as events, festivals, and entertainment venues to attract not only industrial workers but also their families.

Indirectly, opportunities for incubating or setting up small businesses in Downtown Fort Saskatchewan can be achieved. Entrepreneurs can open businesses close to the workforce thereby catering to the needs of this population, such as cafes, lunch spots, clothing stores, and even entertainment venues like pubs and theatres. Additionally, service-oriented businesses (such as auto repair shops, cleaning services, or tech repair) can thrive in response to the workforce's everyday needs.

Industries in the heartland might also foster the creation of satellite offices, innovation hubs, or corporate spaces in Downtown Fort Saskatchewan. These synergies can stimulate professional services such as consulting firms, legal services, or smaller logistics companies to set up shop downtown, further boosting the local economy.

Last, but certainly not least, many companies operating in the industrial heartland have Corporate Social Responsibility (CSR) goals and programs aimed at giving back to the communities where they operate. This could lead to direct investments into Downtown Fort Saskatchewan through sponsorships, grants for local projects, or partnerships with the municipality to enhance public spaces, parks, or cultural institutions, thereby fueling the revitalization.


*Source: TAG Developments*

| Index | Description |
|---|---|
| >= 180 | Extremely High |
| >=110 and <180 | High |
| >=90 and <110 | Similar |
| >=50 and <90 | Low |
| <50 | Extremely Low |

## Table 3-5. Labour Force and Commute

*(Source: FBM & Manifold Data Mining Inc.)*
*Note: the numbers for Downtown's employment category are estimated based on the City of Fort Saskatchewan's Municipal Census Report (2024) and Manifold Data Mining Inc.*

| Attribute | Benchmark | | Downtown Walking Trade Area | | | City of Fort Saskatchewan Trade Area | | | Regional Trade Area | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | PR: Alberta, AB | | | | | | | | | | |
| | value | percent | value | percent | index | value | percent | index | value | percent | index |
| **CLASS OF WORKER** | | | | | | | | | | | |
| Total labour force 15 years and over by class of worker | 2,666,911 | | 2,429 | | | 17,300 | | | 30,802 | | |
| Class of worker - Not applicable | 79,692 | 2.99% | 56 | 2.31% | 77 | 423 | 2.45% | 82 | 717 | 2.33% | 78 |
| All classes of worker | 2,587,219 | 97.01% | 2,373 | 97.69% | 101 | 16,876 | 97.55% | 101 | 30,085 | 97.67% | 101 |
| Employees | 2,184,693 | 81.92% | 2,158 | 88.84% | 108 | 15,464 | 89.39% | 109 | 26,610 | 86.39% | 105 |
| Permanent position | 1,816,468 | 68.11% | 1,678 | 69.09% | 101 | 12,931 | 74.75% | 110 | 21,763 | 70.65% | 104 |
| Temporary position | 368,226 | 13.81% | 480 | 19.75% | 143 | 2,533 | 14.64% | 106 | 4,847 | 15.74% | 114 |
| Fixed term (1 year or more) | 110,099 | 4.13% | 112 | 4.61% | 112 | 631 | 3.65% | 88 | 1,179 | 3.83% | 93 |
| Casual, seasonal or short-term position (less than 1 year) | 258,127 | 9.68% | 368 | 15.14% | 156 | 1,902 | 10.99% | 114 | 3,669 | 11.91% | 123 |
| Self-employed | 402,526 | 15.09% | 215 | 8.85% | 59 | 1,413 | 8.17% | 54 | 3,475 | 11.28% | 75 |
| **PLACE OF WORK** | | | | | | | | | | | |
| Total employed labour force 15 years and over by place of work status | 2,503,441 | | 2,304 | | | 16,397 | | | 29,101 | | |
| At home | 246,445 | 9.24% | 95 | 3.91% | 42 | 1,149 | 6.64% | 72 | 2,127 | 6.90% | 75 |
| Outside Canada | 6,609 | 0.25% | 0 | 0.02% | 8 | 23 | 0.13% | 52 | 28 | 0.09% | 36 |
| No fixed workplace address | 443,845 | 16.64% | 393 | 16.16% | 97 | 3,013 | 17.42% | 105 | 5,749 | 18.66% | 112 |
| Usual place of work | 1,806,542 | 67.74% | 1,816 | 74.78% | 110 | 12,211 | 70.58% | 104 | 21,198 | 68.82% | 102 |
| **COMMUTING DESTINATION** | | | | | | | | | | | |
| Total employed labour force 15 years and over with a usual place of work commuting destination | 1,806,542 | | 1,816 | | | 12,211 | | | 21,198 | | |
| Commute within census subdivision (CSD) of residence | 1,306,886 | 49.00% | 950 | 39.12% | 80 | 5,708 | 32.99% | 67 | 8,672 | 28.15% | 57 |
| Commute to a different census subdivision (CSD) within census division (CD) of residence | 414,408 | 15.54% | 834 | 34.32% | 221 | 5,922 | 34.23% | 220 | 10,707 | 34.76% | 224 |
| Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence | 70,616 | 2.65% | 33 | 1.34% | 51 | 547 | 3.16% | 119 | 1,758 | 5.71% | 215 |
| Commute to a different province or territory | 14,633 | 0.55% | 0 | 0.00% | 0 | 34 | 0.20% | 36 | 60 | 0.20% | 36 |
| **MODE OF TRANSPORTATION** | | | | | | | | | | | |
| Total employed labour force 15 years and over who commute to work by mode of transportation | 2,250,388 | | 2,209 | | | 15,224 | | | 26,946 | | |
| Car, truck or van | 1,968,890 | 73.83% | 1,999 | 82.29% | 111 | 14,210 | 82.14% | 111 | 25,188 | 81.77% | 111 |
| Car, truck, van, as driver | 1,843,967 | 69.14% | 1,932 | 79.54% | 115 | 13,568 | 78.43% | 113 | 24,293 | 78.87% | 114 |
| Car, truck, van, as passenger | 124,923 | 4.68% | 67 | 2.74% | 59 | 642 | 3.71% | 79 | 896 | 2.91% | 62 |
| Public transit | 126,360 | 4.74% | 21 | 0.85% | 18 | 168 | 0.97% | 20 | 222 | 0.72% | 15 |
| Walked | 89,201 | 3.35% | 156 | 6.44% | 192 | 380 | 2.20% | 66 | 849 | 2.76% | 82 |
| Bicycle | 14,910 | 0.56% | 11 | 0.47% | 84 | 76 | 0.44% | 79 | 105 | 0.34% | 61 |
| Other method | 51,027 | 1.91% | 22 | 0.91% | 48 | 389 | 2.25% | 118 | 582 | 1.89% | 99 |

| Index | Description |
|---|---|
| >= 180 | Extremely High |
| >=110 and <180 | High |
| >=90 and <110 | Similar |
| >=50 and <90 | Low |
| <50 | Extremely Low |

## Table 3-6. Labour Force Industry and Occupation

*(Source: FBM & Manifold Data Mining Inc.)*
*Note: the numbers for Downtown's labour force category and occupation are estimated based on the City of Fort Saskatchewan's Municipal Census Report (2024) and Manifold Data Mining Inc.*

| Attribute | Benchmark PR: Alberta, AB | | Downtown Walking Trade Area | | | City of Fort Saskatchewan Trade Area | | | Regional Trade Area | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | value | percent | value | percent | index | value | percent | index | value | percent | index |
| **LABOUR FORCE INDUSTRY** | | | | | | | | | | | |
| Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017 | 2,666,911 | | 2,429 | | | 17,300 | | | 30,802 | | |
| Industry - not applicable | 79,692 | 2.99% | 56 | 2.31% | 77 | 423 | 2.45% | 82 | 717 | 2.33% | 78 |
| All industries | 2,587,219 | 97.01% | 2,373 | 97.69% | 101 | 16,876 | 97.55% | 101 | 30,085 | 97.67% | 101 |
| 11 Agriculture, forestry, fishing, and hunting | 76,906 | 2.88% | 12 | 0.51% | 18 | 169 | 0.98% | 34 | 860 | 2.79% | 97 |
| 21 Mining, quarrying, and oil and gas extraction | 128,887 | 4.83% | 102 | 4.18% | 87 | 1,034 | 5.98% | 124 | 1,763 | 5.72% | 118 |
| 22 Utilities | 23,738 | 0.89% | 11 | 0.44% | 49 | 191 | 1.10% | 124 | 296 | 0.96% | 108 |
| 23 Construction | 248,409 | 9.31% | 352 | 14.50% | 156 | 2,319 | 13.41% | 144 | 4,453 | 14.46% | 155 |
| 31-33 Manufacturing | 138,533 | 5.20% | 143 | 5.89% | 113 | 1,710 | 9.88% | 190 | 2,634 | 8.55% | 164 |
| 41 Wholesale trade | 81,098 | 3.04% | 102 | 4.18% | 138 | 464 | 2.68% | 88 | 836 | 2.71% | 89 |
| 44-45 Retail trade | 299,104 | 11.22% | 361 | 14.85% | 132 | 1,872 | 10.82% | 96 | 3,229 | 10.48% | 93 |
| 48-49 Transportation and warehousing | 149,929 | 5.62% | 155 | 6.39% | 114 | 954 | 5.51% | 98 | 1,773 | 5.75% | 102 |
| 51 Information and cultural industries | 30,769 | 1.15% | 0 | 0.00% | 0 | 99 | 0.57% | 50 | 156 | 0.51% | 44 |
| 52 Finance and insurance | 77,096 | 2.89% | 38 | 1.57% | 54 | 381 | 2.20% | 76 | 564 | 1.83% | 63 |
| 53 Real estate and rental and leasing | 42,822 | 1.61% | 6 | 0.26% | 16 | 215 | 1.24% | 77 | 371 | 1.21% | 75 |
| 54 Professional, scientific, and technical services | 206,433 | 7.74% | 126 | 5.18% | 67 | 793 | 4.58% | 59 | 1,305 | 4.24% | 55 |
| 55 Management of companies and enterprises | 3,940 | 0.15% | 0 | 0.00% | 0 | 0 | 0.00% | 0 | 0 | 0.00% | 0 |
| 56 Administrative and support, waste management and remediation services | 105,824 | 3.97% | 98 | 4.02% | 101 | 491 | 2.84% | 72 | 914 | 2.97% | 75 |
| 61 Educational services | 174,157 | 6.53% | 178 | 7.31% | 112 | 922 | 5.33% | 82 | 1,515 | 4.92% | 75 |
| 62 Health care and social assistance | 337,388 | 12.65% | 261 | 10.73% | 85 | 2,038 | 11.78% | 93 | 3,621 | 11.75% | 93 |
| 71 Arts, entertainment, and recreation | 47,147 | 1.77% | 24 | 1.00% | 56 | 251 | 1.45% | 82 | 437 | 1.42% | 80 |
| 72 Accommodation and food services | 155,048 | 5.81% | 182 | 7.50% | 129 | 1,021 | 5.90% | 102 | 1,536 | 4.99% | 86 |
| 81 Other services (except public administration) | 121,523 | 4.56% | 114 | 4.68% | 103 | 699 | 4.04% | 89 | 1,443 | 4.68% | 103 |
| 91 Public administration | 138,471 | 5.19% | 109 | 4.49% | 87 | 1,256 | 7.26% | 140 | 2,381 | 7.73% | 149 |
| **OCCUPATION** | | | | | | | | | | | |
| Total labour force 15 years and over by occupation | 2,666,911 | | 2,429 | | | 17,300 | | | 30,802 | | |
| Occupation - not applicable | 79,692 | 2.99% | 56 | 2.31% | 77 | 423 | 2.45% | 82 | 717 | 2.33% | 78 |
| All occupations | 2,587,219 | 97.01% | 2,373 | 97.69% | 101 | 16,876 | 97.55% | 101 | 30,085 | 97.67% | 101 |
| 0 Management occupations | 24,427 | 0.92% | 0 | 0.00% | 0 | 78 | 0.45% | 49 | 172 | 0.56% | 61 |
| 1 Business, finance, and administration occupations | 436,463 | 16.37% | 280 | 11.53% | 70 | 2,537 | 14.67% | 90 | 4,414 | 14.33% | 88 |
| 2 Natural and applied sciences and related occupations | 210,767 | 7.90% | 145 | 5.97% | 76 | 1,100 | 6.36% | 81 | 1,764 | 5.73% | 73 |
| 3 Health occupations | 211,314 | 7.92% | 120 | 4.93% | 62 | 1,230 | 7.11% | 90 | 2,058 | 6.68% | 84 |
| 4 Occupations in education, law and social, community and government services | 287,317 | 10.77% | 250 | 10.30% | 96 | 1,989 | 11.50% | 107 | 3,413 | 11.08% | 103 |
| 5 Occupations in art, culture, recreation, and sport | 57,155 | 2.14% | 29 | 1.19% | 56 | 224 | 1.30% | 61 | 411 | 1.33% | 62 |
| 6 Sales and service occupations | 631,812 | 23.69% | 707 | 29.09% | 123 | 3,783 | 21.87% | 92 | 6,397 | 20.77% | 88 |
| 7 Trades, transport and equipment operators and related occupations | 518,146 | 19.43% | 682 | 28.09% | 145 | 4,392 | 25.39% | 131 | 8,401 | 27.27% | 140 |
| 8 Natural resources, agriculture, and related production occupations | 114,520 | 4.29% | 46 | 1.91% | 45 | 477 | 2.76% | 64 | 1,406 | 4.56% | 106 |
| 9 Occupations in manufacturing and utilities | 95,298 | 3.57% | 114 | 4.69% | 131 | 1,065 | 6.16% | 173 | 1,650 | 5.36% | 150 |

## 3.4 Retail Spending Profile

Detailed information of retail spending within each Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2023 year end data projected for the year 2024. The data was further consolidated into 22 specific spending categories in order to build a spending profile for the Trade Areas.

These spending categories, as shown in **Table 3-7** include:

1. Grocery & Specialty Foods
2. Pharmacy
3. Alcohol & Tobacco
4. Personal Services
5. *Health Care & Medical Services**
6. Fashion & Accessories
7. Jewelry
8. Beauty & Personal Care
9. Home Furniture & Decor
10. Appliances & Electronics
11. Home Improvement and Gardening
12. Books & Media
13. Sporting Goods
14. Toys & Hobbies
15. Specialty Retail
16. Quick Service F&B
17. Restaurants & Pubs
18. Arts & Entertainment
19. Fitness & Leisure
20. Auto Parts and Accessories
21. Auto / RV / Motorsports Dealership
22. *Auto Fuel**

Having established the respective 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.

The task involved developing an understanding of how the Trade Area residents spend their shopping and leisure dollars on a household basins for each of the 22 categories. **Table 3-7**, **Table 3-8**, and **Table 3-9** illustrate a spending profile for Fort Saskatchewan's trade areas. Additional miscellaneous inflow is also presented in **Table 3-10** which accounts for the high level impact generated by the large industrial workforce in the direct vicinity of Fort Saskatchewan and its downtown.

*While categories such as "Health Care & Medical Services" and "Auto Fuel" have an associated household expenditure, they are only included in the spending profile and not quantified in the overall demand. Health Care & Medical Services do not have a typical productivity associated with them for forecasting space since a large component of the business model is not a traditional fee-for-service or fee-for-product model and involves direct insurance payment. Auto Fuel is also highly volatile in terms of pricing, which is often a component of quantifying demand and productivity along with an understanding of the number of pumps, vehicles and litres sold as well as the fact that taxes vary from region to region.

### 3.4.1 Downtown Walking Trade Area (DWTA)

Total aggregate retail spending for the DWTA as of estimated for 2024 was $71.9 million excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at $8,398 and Household spending on Auto/ RV/Motorsports was the second highest spending category ($7,025).

Amongst the four major merchandise categories shown in **Figure 3-6**, Grocery & Convenience account for 37% of the total non-auto spending potential, while Comparison Merchandise accounts for 43%.

The DWTA spending (excluding health care and auto) is expected is expected to increase to $80.0 million by 2029 and $87.3 million by 2034, representing a 12% total increase in spending over the period 2023 to 2028 and 6% over the period 2029 to 2034. Importantly, spending can change if and as residential development occurs in the downtown.

### 3.4.2 City of Fort Saskatchewan Trade Area (FSTA)

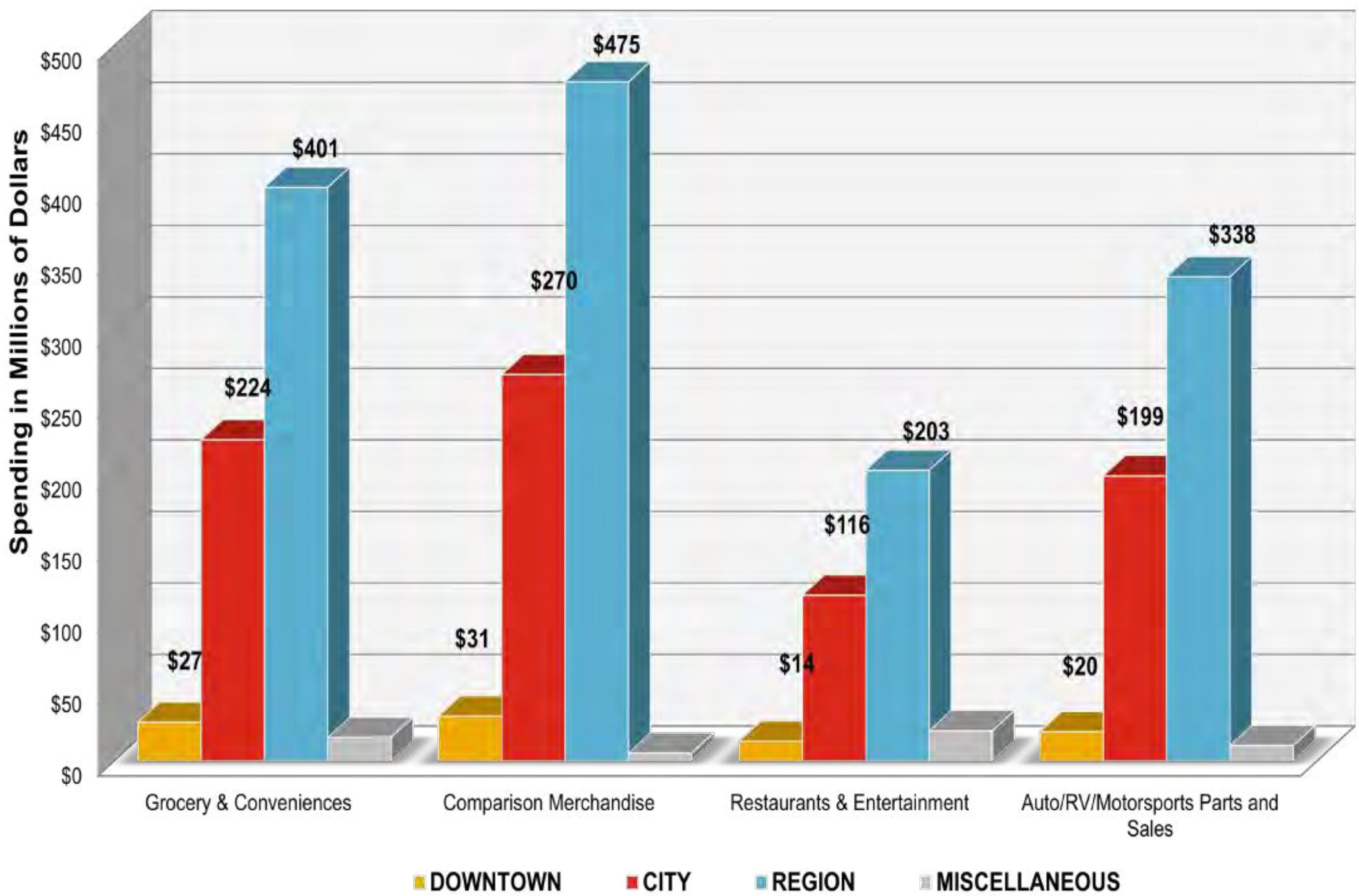
The FSTA includes the DWTA and is seen to be the most crucial trade area to consider (**Figure 3-6**). Total aggregate retail spending for 2024 was $610.3 million, excluding health care and auto.

Unlike DWTA, household spending by category amongst FSTA residents is higher overall and was highest among the categories of Grocery, Convenience and Specialty Foods ($13,086) and Auto/ RV/Motorsports Dealership ($13,201). Estimated for 2024, spending in the broad merchandise categories of Grocery & Conveniences and Comparison Merchandise are comparable at $224.5 and $270.0 million respectively.

Total FSTA spending (excluding health care and auto)

Figure 3-6. Trade Area Spending 2024 by Broad Merchandise Category

*(Source: Manifold Data Mining Inc. & FBM)*




is expected to increase to $711.6 million by 2029 and $824.3 million by 2034 representing a 17% and 16% total increase respectively in spending over each of the 5-year periods 2024 to 2029 and 2029 to 2034.

### 3.4.3 Regional Trade Area (RTA)

The RTA is seen to be the broader trade area which if the downtown continues to be successful in its marketing and exposure could be a valuable segment to tap into (**Figure 3-6**). Total aggregate retail spending for this largest population base, which includes both the downtown and the city trade areas in 2024 was $1.01 billion, excluding health care and auto.

Household spending category amongst RTA residents was highest among the categories of Grocery, Convenience and Specialty Foods ($12,901) and Auto/RV/Motorsports Dealership ($12,096). As of 2023, spending in the broad merchandise categories of Grocery & Conveniences and Comparison Merchandise are comparable at $400.9 and $474.7 million respectively.

Total RTA spending (excluding health care and auto) is expected to increase to $1.22 billion by 2029 and $1.38 billion by 2034 representing a 13% total increase in spending over each of the 5-year periods 2024 to 2029 and 2029 to 2034.

## Table 3-7. Trade Area Retail Spending 2024 (by Detailed Merchandise Category)

*(Source: FBM & Manifold Data Mining Inc.)*

*Note: "Auto Parts & Accessories" includes "Maintenance and Repair" and "Online Sales Operation of Recreational Vehicles" as spending categories, which often include services that are not factored into the full inventory of this type of study.*

| Retail Spending by Merchandise Category | | 2024 DOWNTOWN FORT SASKATCHEWAN Per Household Retail Spending | 2024 DOWNTOWN FORT SASKATCHEWAN Aggregate Retail Spending | 2024 CITY OF FORT SASKATCHEWAN Per Household Retail Spending | 2024 CITY OF FORT SASKATCHEWAN Aggregate Retail Spending | 2024 FORT SASKATCHEWAN REGION Per Household Retail Spending | 2024 FORT SASKATCHEWAN REGION Aggregate Retail Spending |
|---|---|---|---|---|---|---|---|
| Convenience & Day-to-Day Goods/Services | Grocery & Convenience | $8,398 | $17,392,619 | $13,086 | $148,878,944 | $12,901 | $265,483,334 |
| | Pharmacy | $1,038 | $2,148,979 | $1,189 | $13,527,583 | $1,229 | $25,290,524 |
| | Alcohol, Tobacco & Cannabis | $709 | $1,468,025 | $892 | $10,150,821 | $899 | $18,502,982 |
| | Personal Services | $2,841 | $5,883,061 | $4,565 | $51,934,651 | $4,454 | $91,661,509 |
| | Health Care & Medical Services | $848 | $1,755,351 | $1,197 | $13,615,925 | $1,226 | $25,229,789 |
| Comparison or Department Store Type Merchandise (DSTM) Goods/Services | Fashion & Accessories | $2,370 | $4,908,822 | $3,949 | $44,930,492 | $3,719 | $76,535,868 |
| | Jewelry | $172 | $356,321 | $283 | $3,224,742 | $266 | $5,463,761 |
| | Beauty & Personal Care | $1,697 | $3,514,409 | $2,556 | $29,080,329 | $2,470 | $50,835,843 |
| | Home Furniture & Décor | $599 | $1,240,149 | $1,019 | $11,593,345 | $953 | $19,613,000 |
| | Appliances & Electronics | $4,361 | $9,032,405 | $6,884 | $78,323,853 | $6,779 | $139,502,152 |
| | Home Improvement & Gardening | $3,078 | $6,374,272 | $4,524 | $51,473,223 | $4,511 | $92,831,384 |
| | Books & Media | $37 | $77,315 | $87 | $993,940 | $80 | $1,653,705 |
| | Sporting Goods | $865 | $1,792,044 | $1,492 | $16,978,853 | $1,445 | $29,738,418 |
| | Toys & Hobbies | $753 | $1,559,703 | $1,190 | $13,542,271 | $1,111 | $22,856,304 |
| | Specialty Retail | $1,126 | $2,332,009 | $1,749 | $19,900,944 | $1,735 | $35,703,361 |
| Leisure, Recreation & Entertainment Goods/Services | Quick Service F&B | $2,176 | $4,505,541 | $3,404 | $38,726,967 | $3,356 | $69,061,670 |
| | Restaurants & Pubs | $2,887 | $5,978,234 | $4,478 | $50,947,412 | $4,258 | $87,630,504 |
| | Arts & Entertainment | $1,234 | $2,554,730 | $1,709 | $19,444,761 | $1,714 | $35,267,530 |
| | Fitness & Leisure | $343 | $710,110 | $588 | $6,694,341 | $540 | $11,121,817 |
| Automotive Goods (excluding repair) | Auto Parts & Accessories | $2,792 | $5,781,782 | $4,308 | $49,011,263 | $4,352 | $89,554,478 |
| | Auto/RV/Motorsports Dealership | $7,025 | $14,549,140 | $13,201 | $150,182,191 | $12,096 | $248,929,426 |
| | Auto Fuel | $1,613 | $3,339,874 | $2,347 | $26,698,121 | $2,443 | $50,272,100 |
| | **TOTAL CATEGORIES** | **$46,960** | **$97,254,896** | **$74,699** | **$849,854,971** | **$72,537** | **$1,492,739,458** |
| | **TOTAL (excluding Health Care & Auto)** | **$34,683** | **$71,828,749** | **$53,647** | **$610,347,471** | **$52,420** | **$1,078,753,665** |

Table 3-8. Trade Area Retail Spending Potential 2029

*(Source: Manifold Data Mining Inc. & FBM)*

| Retail Spending by Merchandise Category | | 2029 | | 2029 | | 2029 | |
|---|---|---|---|---|---|---|---|
| | | DOWNTOWN FORT SASKATCHEWAN Per Household Retail Spending | DOWNTOWN FORT SASKATCHEWAN Aggregate Retail Spending | CITY OF FORT SASKATCHEWAN Per Household Retail Spending | CITY OF FORT SASKATCHEWAN Aggregate Retail Spending | FORT SASKATCHEWAN REGION Per Household Retail Spending | FORT SASKATCHEWAN REGION Aggregate Retail Spending |
| Convenience & Day-to-Day Goods/Services | Grocery & Convenience | $8,827 | $19,365,485 | $13,753 | $173,582,587 | $13,559 | $301,316,249 |
| | Pharmacy | $1,091 | $2,392,740 | $1,250 | $15,772,229 | $1,292 | $28,704,046 |
| | Alcohol, Tobacco & Cannabis | $745 | $1,634,544 | $938 | $11,835,158 | $945 | $21,000,373 |
| | Personal Services | $2,986 | $6,550,384 | $4,798 | $60,552,224 | $4,681 | $104,033,280 |
| | Health Care & Medical Services | $891 | $1,954,463 | $1,258 | $15,875,230 | $1,289 | $28,635,113 |
| Comparison or Department Store Type Merchandise (DSTM) Goods/Services | Fashion & Accessories | $2,491 | $5,465,636 | $4,151 | $52,385,857 | $3,909 | $86,866,095 |
| | Jewelry | $181 | $396,738 | $298 | $3,759,827 | $279 | $6,201,218 |
| | Beauty & Personal Care | $1,784 | $3,913,053 | $2,686 | $33,905,659 | $2,596 | $57,697,277 |
| | Home Furniture & Décor | $629 | $1,380,820 | $1,071 | $13,517,041 | $1,002 | $22,260,213 |
| | Appliances & Electronics | $4,584 | $10,056,962 | $7,236 | $91,320,214 | $7,125 | $158,331,088 |
| | Home Improvement & Gardening | $3,235 | $7,097,314 | $4,755 | $60,014,230 | $4,741 | $105,361,055 |
| | Books & Media | $39 | $86,085 | $92 | $1,158,866 | $84 | $1,876,910 |
| | Sporting Goods | $909 | $1,995,317 | $1,569 | $19,796,172 | $1,519 | $33,752,283 |
| | Toys & Hobbies | $792 | $1,736,622 | $1,251 | $15,789,354 | $1,167 | $25,941,273 |
| | Specialty Retail | $1,183 | $2,596,532 | $1,838 | $23,203,129 | $1,823 | $40,522,328 |
| Leisure, Recreation & Entertainment Goods/Services | Quick Service F&B | $2,287 | $5,016,610 | $3,578 | $45,152,974 | $3,527 | $78,383,087 |
| | Restaurants & Pubs | $3,034 | $6,656,353 | $4,707 | $59,401,171 | $4,475 | $99,458,200 |
| | Arts & Entertainment | $1,296 | $2,844,517 | $1,796 | $22,671,251 | $1,801 | $40,027,672 |
| | Fitness & Leisure | $360 | $790,659 | $618 | $7,805,140 | $568 | $12,622,955 |
| Automotive Goods (excluding repair) | Auto Parts & Accessories | $2,934 | $6,437,617 | $4,528 | $57,143,754 | $4,574 | $101,641,858 |
| | Auto/RV/Motorsports Dealership | $7,384 | $16,199,466 | $13,874 | $175,102,083 | $12,713 | $282,528,020 |
| | Auto Fuel | $1,695 | $3,718,720 | $2,466 | $31,128,169 | $2,567 | $57,057,444 |
| | **TOTAL CATEGORIES** | **$49,356** | **$108,286,638** | **$78,510** | **$990,872,321** | **$76,237** | **$1,694,218,036** |
| | **TOTAL (excluding Auto)** | **$36,452** | **$79,976,371** | **$56,384** | **$711,623,083** | **$55,094** | **$1,224,355,601** |

Table 3-9. Trade Area Retail Spending Potential 2034

*(Source: Manifold Data Mining Inc. & FBM)*

| Retail Spending by Merchandise Category | | 2034 DOWNTOWN FORT SASKATCHEWAN Per Household Retail Spending | 2034 DOWNTOWN FORT SASKATCHEWAN Aggregate Retail Spending | 2034 CITY OF FORT SASKATCHEWAN Per Household Retail Spending | 2034 CITY OF FORT SASKATCHEWAN Aggregate Retail Spending | 2034 FORT SASKATCHEWAN REGION Per Household Retail Spending | 2034 FORT SASKATCHEWAN REGION Aggregate Retail Spending |
|---|---|---|---|---|---|---|---|
| Convenience & Day-to-Day Goods/Services | Grocery & Convenience | $8,827 | $21,139,625 | $14,455 | $201,069,589 | $14,250 | $340,498,806 |
| | Pharmacy | $1,091 | $2,611,948 | $1,313 | $18,269,780 | $1,358 | $32,436,662 |
| | Alcohol, Tobacco & Cannabis | $745 | $1,784,291 | $986 | $13,709,268 | $993 | $23,731,219 |
| | Personal Services | $2,986 | $7,150,487 | $5,042 | $70,140,738 | $4,920 | $117,561,558 |
| | Health Care & Medical Services | $891 | $2,133,518 | $1,322 | $18,389,091 | $1,354 | $32,358,765 |
| Comparison or Department Store Type Merchandise (DSTM) Goods/Services | Fashion & Accessories | $2,491 | $5,966,362 | $4,362 | $60,681,217 | $4,108 | $98,161,987 |
| | Jewelry | $181 | $433,085 | $313 | $4,355,200 | $293 | $7,007,612 |
| | Beauty & Personal Care | $1,784 | $4,271,541 | $2,823 | $39,274,659 | $2,729 | $65,200,114 |
| | Home Furniture & Décor | $629 | $1,507,322 | $1,126 | $15,657,480 | $1,053 | $25,154,886 |
| | Appliances & Electronics | $4,584 | $10,978,315 | $7,605 | $105,780,874 | $7,488 | $178,920,143 |
| | Home Improvement & Gardening | $3,235 | $7,747,523 | $4,998 | $69,517,552 | $4,983 | $119,061,994 |
| | Books & Media | $39 | $93,972 | $97 | $1,342,374 | $89 | $2,120,979 |
| | Sporting Goods | $909 | $2,178,115 | $1,649 | $22,930,919 | $1,596 | $38,141,361 |
| | Toys & Hobbies | $792 | $1,895,720 | $1,315 | $18,289,616 | $1,227 | $29,314,624 |
| | Specialty Retail | $1,183 | $2,834,409 | $1,932 | $26,877,371 | $1,916 | $45,791,770 |
| Leisure, Recreation & Entertainment Goods/Services | Quick Service F&B | $2,287 | $5,476,199 | $3,760 | $52,302,999 | $3,707 | $88,575,865 |
| | Restaurants & Pubs | $3,034 | $7,266,164 | $4,947 | $68,807,414 | $4,704 | $112,391,544 |
| | Arts & Entertainment | $1,296 | $3,105,113 | $1,888 | $26,261,269 | $1,893 | $45,232,790 |
| | Fitness & Leisure | $360 | $863,094 | $650 | $9,041,093 | $597 | $14,264,418 |
| Automotive Goods (excluding repair) | Auto Parts & Accessories | $2,934 | $7,027,389 | $4,759 | $66,192,533 | $4,807 | $114,859,161 |
| | Auto/RV/Motorsports Dealership | $7,384 | $17,683,556 | $14,582 | $202,829,699 | $13,362 | $319,267,395 |
| | Auto Fuel | $1,695 | $4,059,405 | $2,592 | $36,057,351 | $2,698 | $64,477,079 |
| | **TOTAL CATEGORIES** | **$49,356** | **$118,207,155** | **$82,515** | **$1,147,778,087** | **$80,126** | **$1,914,530,735** |
| | **TOTAL (excluding Auto)** | **$36,452** | **$87,303,286** | **$59,260** | **$824,309,413** | **$57,904** | **$1,383,568,336** |

## 3.4.4 Miscellaneous Inflow

Miscellaneous inflow spending accounts for an percentage (4%) of overall Trade Area retail spending. In broad terms miscellaneous inflow is derived from passing motorists, visitors, or infrequent residents from outside of the Primary or Secondary Trade Areas. More specifically however, in the context of Fort Saskatchewan, miscellaneous inflow is derived from the high volume of industrial heartland workers who may be living in short-term accommodations as part of a "shadow" trade area population base.

The forthcoming section 3.5 visually illustrates through mobile phone tracking the magnitude of visitation of those who spend at least 1 hour in Downtown Fort Saskatchewan. This pattern of visitation is considered in the miscellaneous inflow to validate at a high level the importance of customers from outside of the defined trade areas.

Categories where miscellaneous inflow spending is likely to be higher included Grocery & Convenience, Pharmacy, and Full and Quick Service F&B. Auto dealers, parts and service are also expected to garner strong spending potential while traditional home and fashion categories may have lower spending patterns until such time as they become part of the full-time trade area base.

Total retail miscellaneous inflow spending for 2024 is estimated at $55.9 million and is expected to increase to $63.5million by 2028 and $71.6 million by 2034.

Table 3-10. Miscellaneous Inflow Retail Spending: 2024, 2029, and 2034

*(Source: Manifold Data Mining Inc. & FBM)*

| | | | 2024 | 2029 | 2034 |
|---|---|---|---|---|---|
| | Miscellaneous Inflow Factor (based on Fort Sask Region) | Retail Spending by Merchandise Category | FORT SASK Misc Inflow Spending | FORT SASK Misc Inflow Spending | FORT SASK Misc Inflow Spending |
| Convenience & Day-to-Day Goods/Services | 5.0% | Grocery & Convenience | $13,274,167 | $15,065,812 | $17,024,940 |
| | 5.0% | Pharmacy | $1,264,526 | $1,435,202 | $1,621,833 |
| | 5.0% | Alcohol, Tobacco & Cannabis | $925,149 | $1,050,019 | $1,186,561 |
| | 1.0% | Personal Services | $916,615 | $1,040,333 | $1,175,616 |
| | 0.0% | Health Care & Medical Services | $0 | $0 | $0 |
| Comparison or Department Store Type Merchandise (DSTM) Goods/Services | 2.5% | Fashion & Accessories | $1,913,397 | $2,171,652 | $2,454,050 |
| | 0.0% | Jewelry | $0 | $0 | $0 |
| | 1.0% | Beauty & Personal Care | $508,358 | $576,973 | $652,001 |
| | 1.0% | Home Furniture & Décor | $196,130 | $222,602 | $251,549 |
| | 0.5% | Appliances & Electronics | $697,511 | $791,655 | $894,601 |
| | 1.0% | Home Improvement & Gardening | $928,314 | $1,053,611 | $1,190,620 |
| | 0.0% | Books & Media | $0 | $0 | $0 |
| | 0.5% | Sporting Goods | $148,692 | $168,761 | $190,707 |
| | 0.5% | Toys & Hobbies | $114,282 | $129,706 | $146,573 |
| | 2.5% | Specialty Retail | $892,584 | $1,013,058 | $1,144,794 |
| | | | $0 | $0 | $0 |
| Leisure, Recreation & Entertainment Goods/Services | 10.0% | Quick Service F&B | $6,906,167 | $7,838,309 | $8,857,587 |
| | 15.0% | Restaurants & Pubs | $13,144,576 | $14,918,730 | $16,858,732 |
| | 1.0% | Arts & Entertainment | $352,675 | $400,277 | $452,328 |
| | 5.0% | Fitness & Leisure | $556,091 | $631,148 | $713,221 |
| | | | $0 | $0 | $0 |
| Automotive Goods (excluding repair) | 5.0% | Auto Parts & Accessories | $4,477,724 | $5,082,093 | $5,742,958 |
| | 2.5% | Auto/RV/Motorsports Dealership | $6,223,236 | $7,063,201 | $7,981,685 |
| | 5.0% | Auto Fuel | $2,513,605 | $2,852,872 | $3,223,854 |
| | **3.7%** | **TOTAL RETAIL CATEGORIES ONLY** | **$55,953,798** | **$63,506,014** | **$71,764,208** |
| | | **TOTAL (excluding Auto)** | **$42,739,233** | **$48,507,849** | **$54,815,711** |

## 3.5 Mobile Phone Tracking

The value added approach of mobile phone tracking uses Artificial Intelligence and Machine Learning models to convert location pings into trips, locks the trips onto road networks, and scales the measured trips to trip counts. Processed data can be used to enhance tourism, estimate traffic counts, understand visitor volumes and catchment areas.

**Figure 3-7 and Figure 3-8** illustrate the volume of visitors in Fort Saskatchewan between July and September 2023. The origins of mobile phone tracking are widely distributed across the country, suggesting an active flow of commuters and visitors in Fort Saskatchewan. Clusters of visitors were visible in major cities such as Vancouver, Calgary, Saskatchewanatoon, Winnipeg, and Toronto.

This wide distribution likely reflects workers coming to the Industrial Heartland from across the country. This has the potential to translate into local spending.

From the regional perspective, visitor origins were distributed evenly across the City of Edmonton. Sherwood Park was also a major origin, with the largest concentration of workers/visitors from regional communities.

Figure 3-7. Country-wide Mobile Phone Tracking Data, July-September 2023

*(Source: Manifold Data Mining Inc. & FBM)*

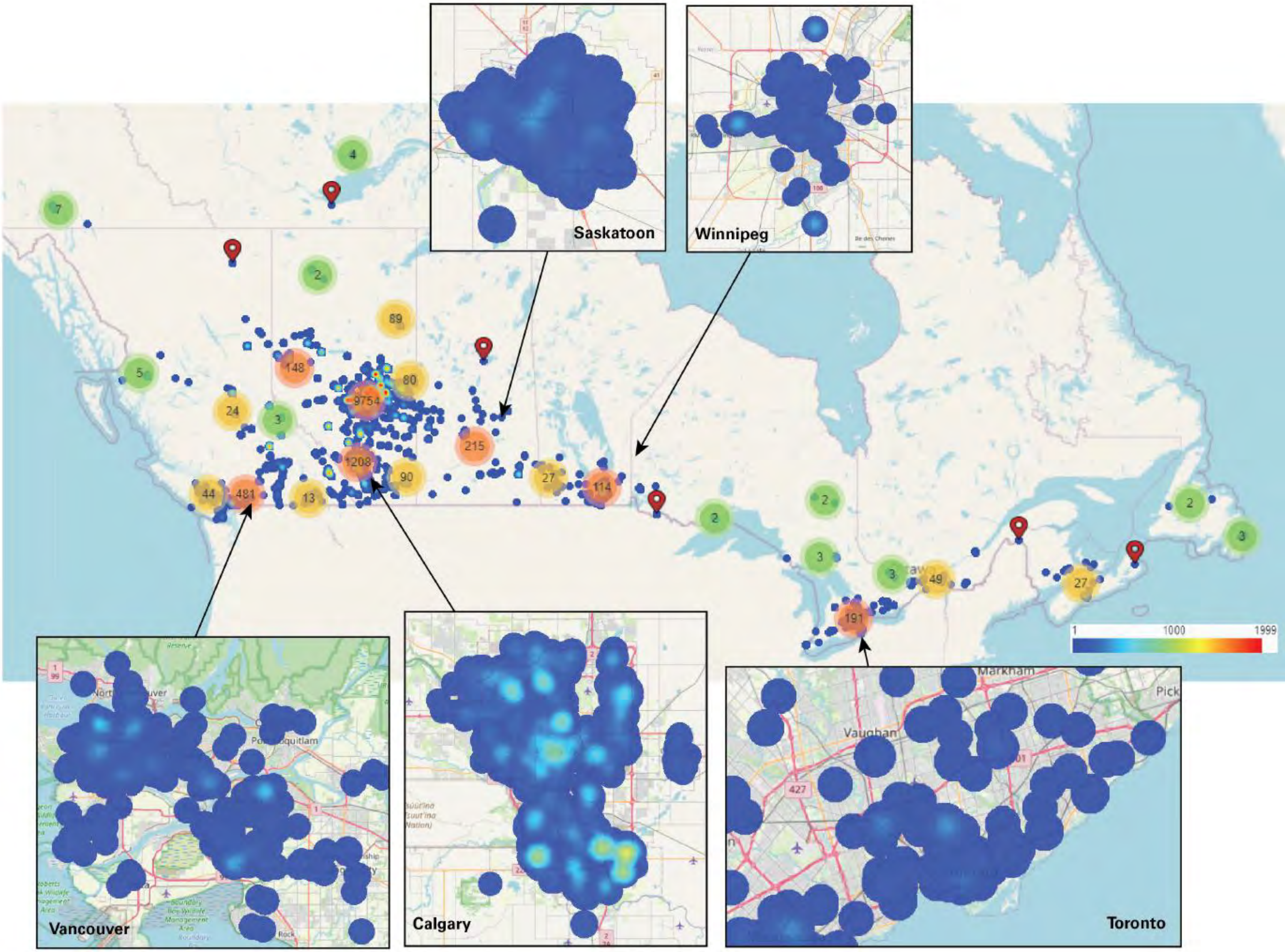
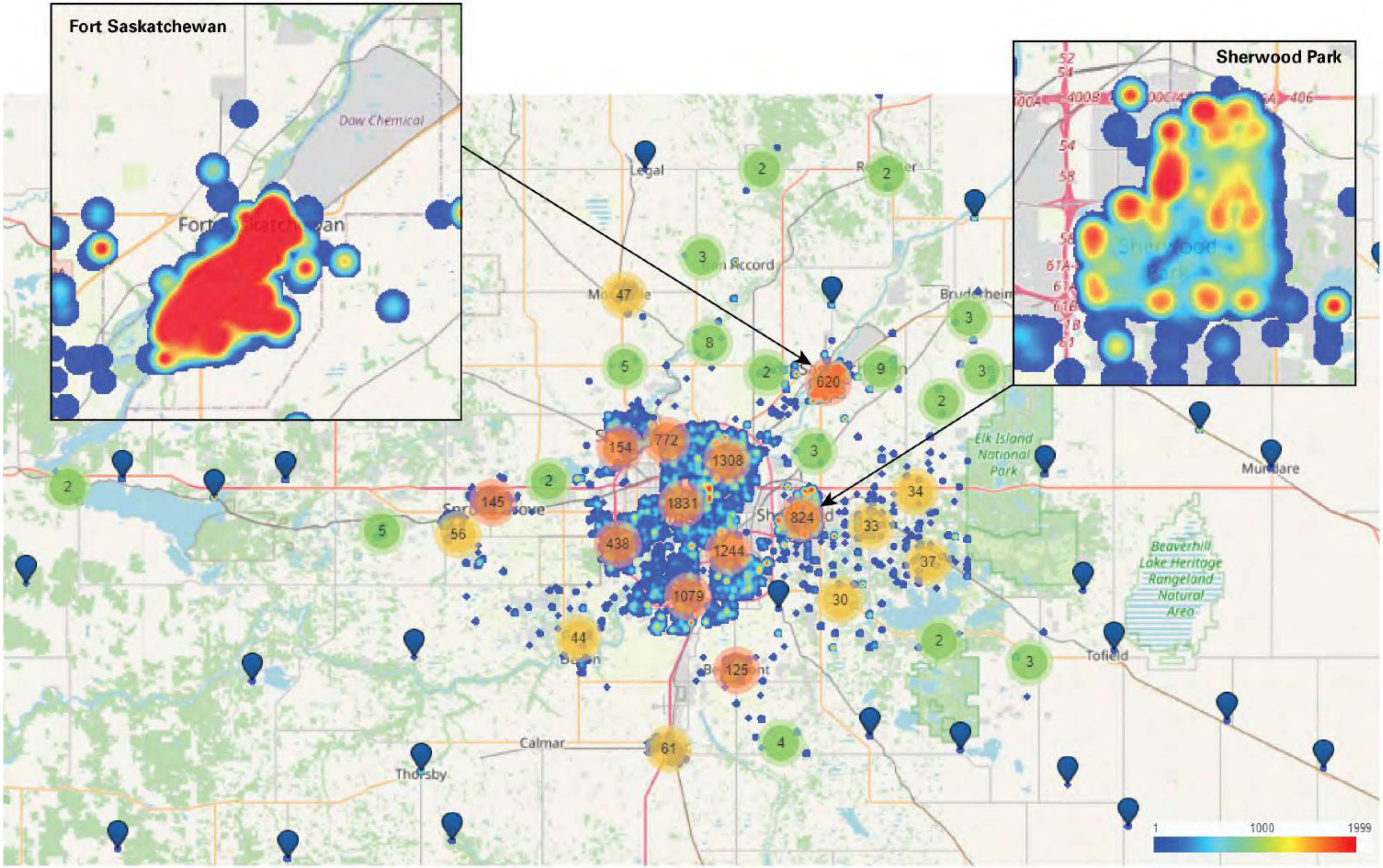


Figure 3-8. Edmonton Metropolitan Region Mobile Phone Tracking Data, July-September 2023

*(Source: Manifold Data Mining Inc. & FBM)*



# 4.0 Commercial Supply

## 4.1 Introduction

The dynamics of the overall commercial market comprising retail and food & beverage shops and services, and street level office services provide critical indicators as to the performance of Downtown Fort Saskatchewan's commercial nodes and moreover the magnitude of demand and resulting opportunity for which certain market segments or gaps could be filled.

This section will provide a detailed inventory of the business mix (predominantly the ground floor) that comprise the current commercial market for Downtown Fort Saskatchewan. A detailed inventory is included in **Appendix A**.

The purpose of the inventory and evaluation is to 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 be considered a compatible market for expansion or attraction.

## 4.2 Market Overview

To document the retail inventory, FBM conducted on-the-ground fieldwork in which settlement retail premises were documented in terms of the retail store, merchandise category, estimated unit size, and vacancy as well as North American Industry Classification System (NAICS) code.

The inventory was categorized into the same merchandise categories that were profiled in the retail spending to develop a direct comparison.

The market consists of two nodes, which were both based on the MDP policy areas:

- Downtown Core; and
- 99th Ave Corridor.

**Figure 4-1** illustrates the boundaries of the two nodes with the summaries of the inventory.

According to local market data (CoStar) average retail lease rates in downtown are in the range of $15 per sf. These seem to be consistent with the overall estimated sales productivities for downtown retail businesses which fall in the $150 to $200 per sf range (refer to Table 4-3 which shows the current estimated retail sales productivity in the downtown core node at $182 psf.

## 4.3 Overall Inventory Summary

The full retail and business mix inventory for Downtown Fort Saskatchewan is summarized in **Table 4-2** and **Figure 4-2**.

The summary of the current inventory illustrates a total ground floor commercial space of 569,941 sf. This floorspace includes Community Service, Professional & Financial Services as well as Medical & Wellness Services.

When excluding these "non-retail" segments, as well as automotive categories, the "retail only" inventory for Downtown equates to 300,963 sf. When compared against the City of Fort Saskatchewan's population the resulting per capita figure is 10.1 sf.

### *4.3.1 Retail Inventory by Category*

The Top 5 retail categories (excluding Professional & Financial Services and Auto) in terms of overall retail floorspace are:

1. Grocery, Convenience & Specialty Foods (58,988 sf)
2. Personal Service (49,455 sf)
3. Full Service F&B (43,041 sf)
4. Beauty & Personal Care (36,242 sf)
5. Specialty Retail (28,890 sf)

The Top 5 are then followed by Fitness & Leisure(19,658 sf) and Alcohol, Tobacco & Cannabis (14,028 sf).

Overall, as shown in **Table 4-1,** Downtown Fort Saskatchewan has a mix of 89% local businesses to 11% in terms of the overall store count and a mix of 68% local to 32% branded in terms of the floorspace. Not unexpectedly, the local businesses are typically smaller in size, while the recognized branded businesses are larger.

Table 4-1. Downtown Fort Saskatchewan Retail Mix Summary

*(Source: FBM)*

| | |
|---|---|
| Local | 84 |
| Brand | 12 |
| Local | 88% |
| Brand | 13% |
| Local | 203,389 |
| Brand | 98,740 |
| Local | 67% |
| Brand | 33% |
| Avg Local Size | 2,421 |
| Avg Branded Size | 8,228 |

Figure 4-1. Downtown Fort Saskatchewan Retail Nodes Summary

*(Source: FBM)*

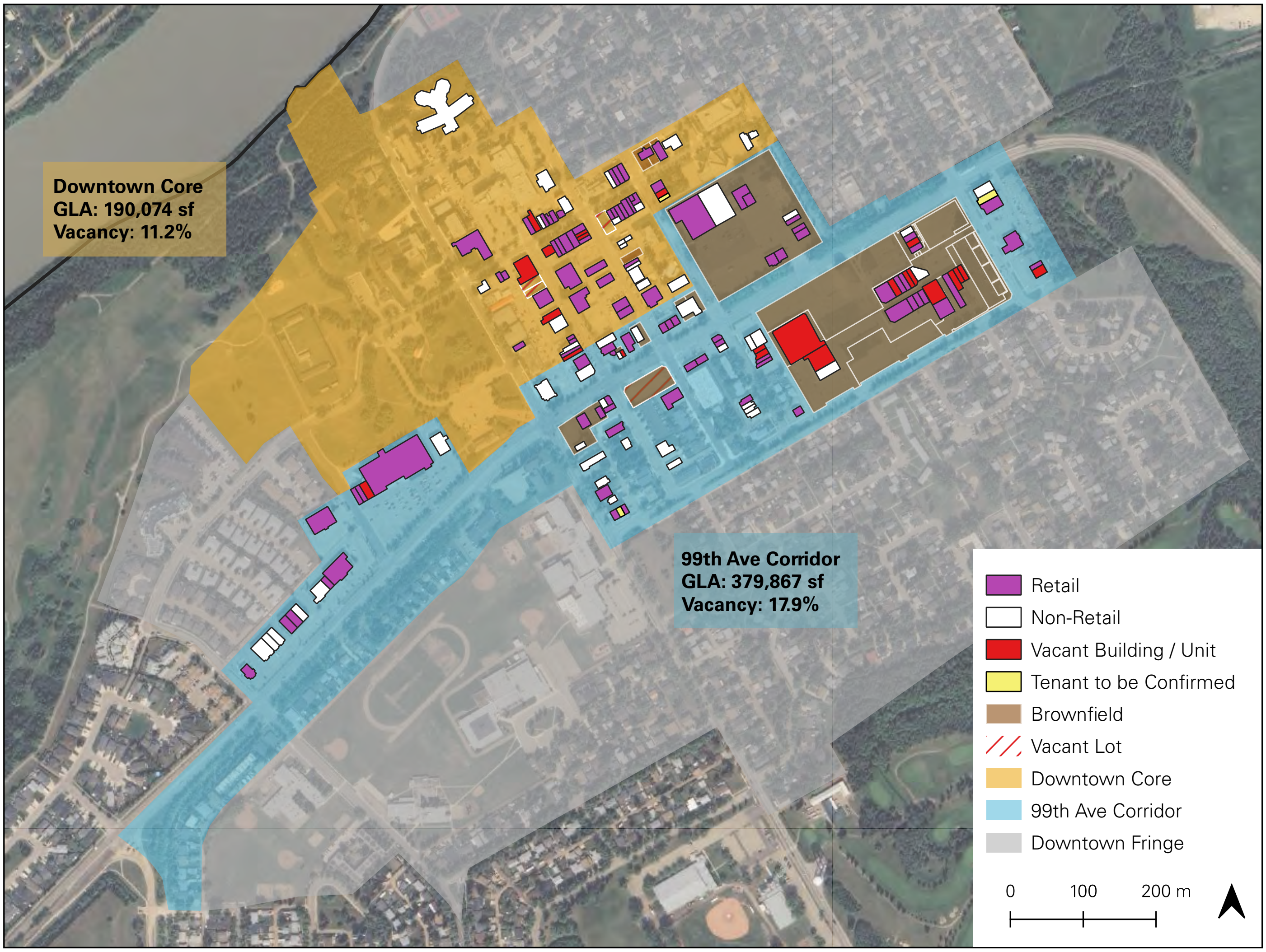


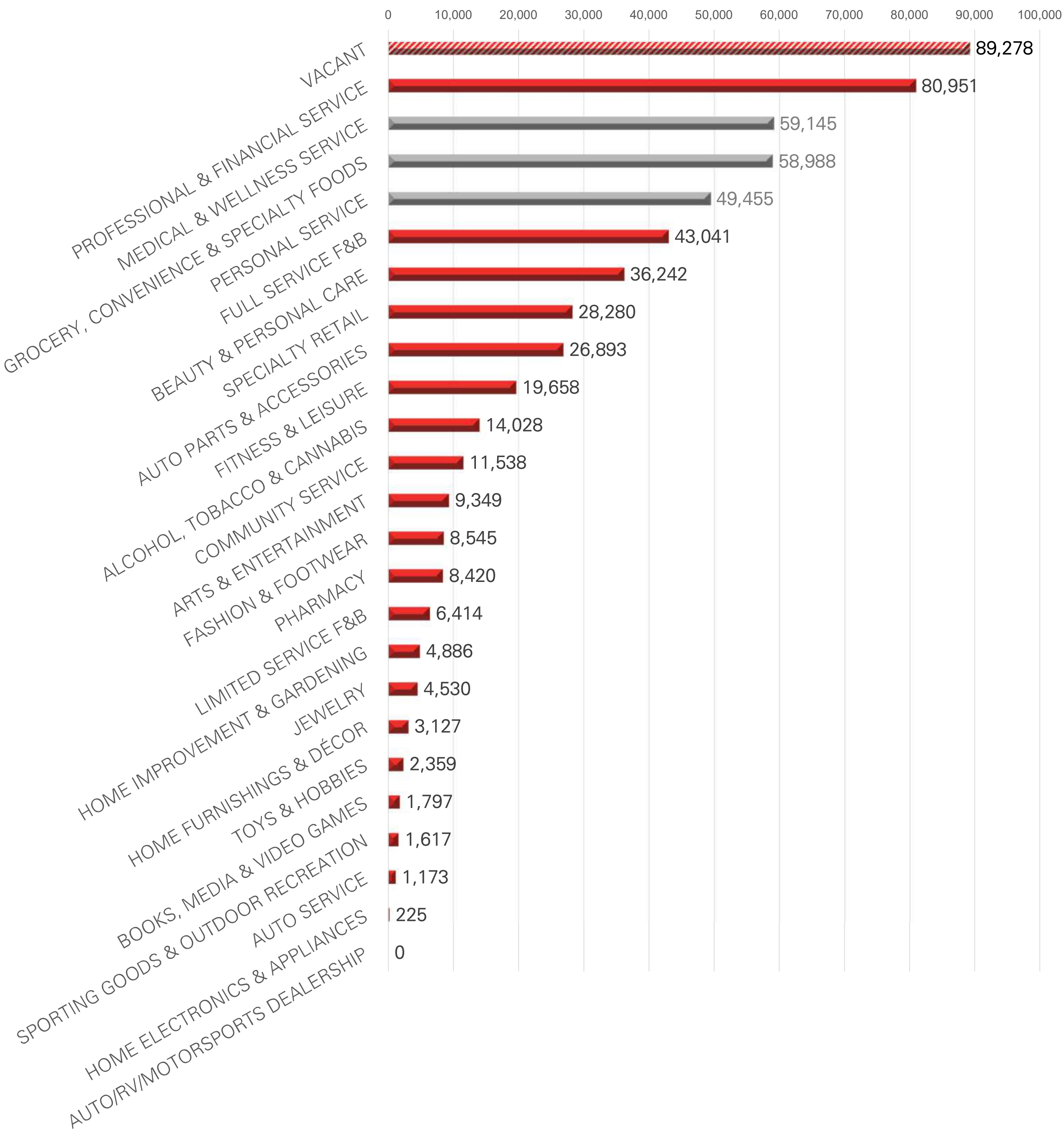
Table 4-2. Downtown Fort Saskatchewan Commercial Inventory Total

*(Source: FBM)*

| RETAIL MERCHANDISE or BUSINESS CATEGORY | General Classification | ALL NODES FLOORSPACE (sq. ft.) | ALL NODES FLOORSPACE MIX (%) |
|---|---|---|---|
| **VACANT** | N/A | 89,278 | 15.7% |
| PROFESSIONAL & FINANCIAL SERVICE | Non-Retail | 80,951 | 14.2% |
| MEDICAL & WELLNESS SERVICE | Non-Retail | 59,145 | 10.4% |
| GROCERY, CONVENIENCE & SPECIALTY FOODS | Retail | 58,988 | 10.3% |
| PERSONAL SERVICE | Retail | 49,455 | 8.7% |
| FULL SERVICE F&B | Retail | 43,041 | 7.6% |
| BEAUTY & PERSONAL CARE | Retail | 36,242 | 6.4% |
| SPECIALTY RETAIL | Retail | 28,280 | 5.0% |
| AUTO PARTS & ACCESSORIES | Auto | 26,893 | 4.7% |
| FITNESS & LEISURE | Retail | 19,658 | 3.4% |
| ALCOHOL, TOBACCO & CANNABIS | Retail | 14,028 | 2.5% |
| COMMUNITY SERVICE | Non-Retail | 11,538 | 2.0% |
| ARTS & ENTERTAINMENT | Retail | 9,349 | 1.6% |
| FASHION & FOOTWEAR | Retail | 8,545 | 1.5% |
| PHARMACY | Retail | 8,420 | 1.5% |
| LIMITED SERVICE F&B | Retail | 6,414 | 1.1% |
| HOME IMPROVEMENT & GARDENING | Retail | 4,886 | 0.9% |
| JEWELRY | Retail | 4,530 | 0.8% |
| HOME FURNISHINGS & DÉCOR | Retail | 3,127 | 0.5% |
| TOYS & HOBBIES | Retail | 2,359 | 0.4% |
| BOOKS, MEDIA & VIDEO GAMES | Retail | 1,797 | 0.3% |
| SPORTING GOODS & OUTDOOR RECREATION | Retail | 1,617 | 0.3% |
| AUTO SERVICE | Auto | 1,173 | 0.2% |
| HOME ELECTRONICS & APPLIANCES | Retail | 225 | 0.0% |
| AUTO/RV/MOTORSPORTS DEALERSHIP | Auto | 0 | 0.0% |
| **TOTAL - all streetfront inventory** | | **569,941** | |
| **Retail ONLY Floorspace (excluding Medical & Wellness, Professional, Auto & Vacant)** | | **300,963** | |
| **Total Estimated Retail Sales (excluding Medical & Wellness, Professional, Auto & Vacant)** | | **$92,187,275** | |
| | | | |
| **Estimated Retail Sales Productivity ($/sf)** | | **CA$306** | |

Figure 4-2. Downtown Fort Saskatchewan Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

*(Source: FBM)*



## 4.4 Retail Inventory By Node

### *Downtown Core Summary*

- Total GLA:190,074 sf
- Vacancy: 11.2%
- Local Stores: 93%
- Branded Stores: 7%

The Downtown core node, as shown in **Figure 4-3**, is Fort Saskatchewan's oldest, densest and most walkable commercial area. 100 Avenue serves as the main spine for Downtown core.

**Figure 4-4** and **Table 4-3** represent the Downtown Core node's total inventory by retail merchandise category. The top 3 retail categories are:

- Full Service F&B (25,461 sf)
- Fitness & Leisure (17,637 sf)
- Personal Service (12,428 sf)

The overall mix of retail in the downtown is dominated by professional and medical businesses which will be the key to attracting residential and supportive retail businesses. The retail mix shows a trend towards leisure and relaxation whereby restaurants, fitness and personal services dominate the area.

However, there are nuggets of high community value in the downtown core that include specific retail and non-retail forms such as the Library, Legacy Jewelers, Blu Poppie, Daisy a Day, Twice but Nice, and Fort Cinema etc that rated highly among survey respondents' favourite places. The city should be very active in creating stories about it local businesses and the successes thereof.

Though the largest vacancy in the Downtown Core is the former Fort Lanes, it is not inconceivable that another operator could take this concept and convert this into a more modern type of entertainment concept. Excluding the latter from the vacancy conversation, means that there are approximately 8 vacant units with an average of 1,661 sf which is a very appealing size for incubating local businesses, but may also present an opportunity to create even small units for potential interested retail concepts.

Figure 4-3. Downtown Core Commercial Node

*(Source: FBM with data from the City of Fort Saskatchewan and Google)*

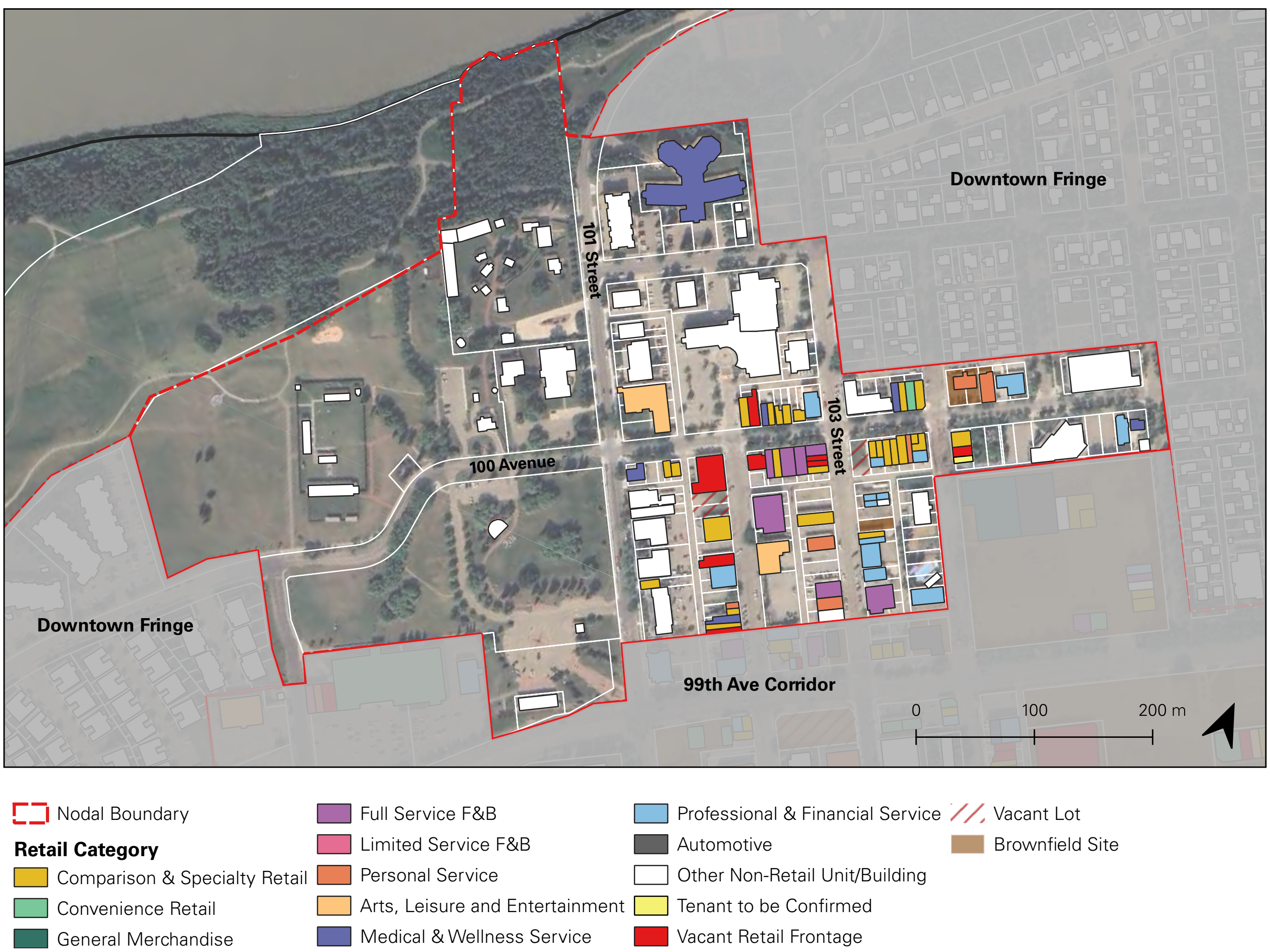


Figure 4-4. Downtown Core Inventory Total (Sorted Largest to Smallest Floorspace)

*(Source: FBM)*

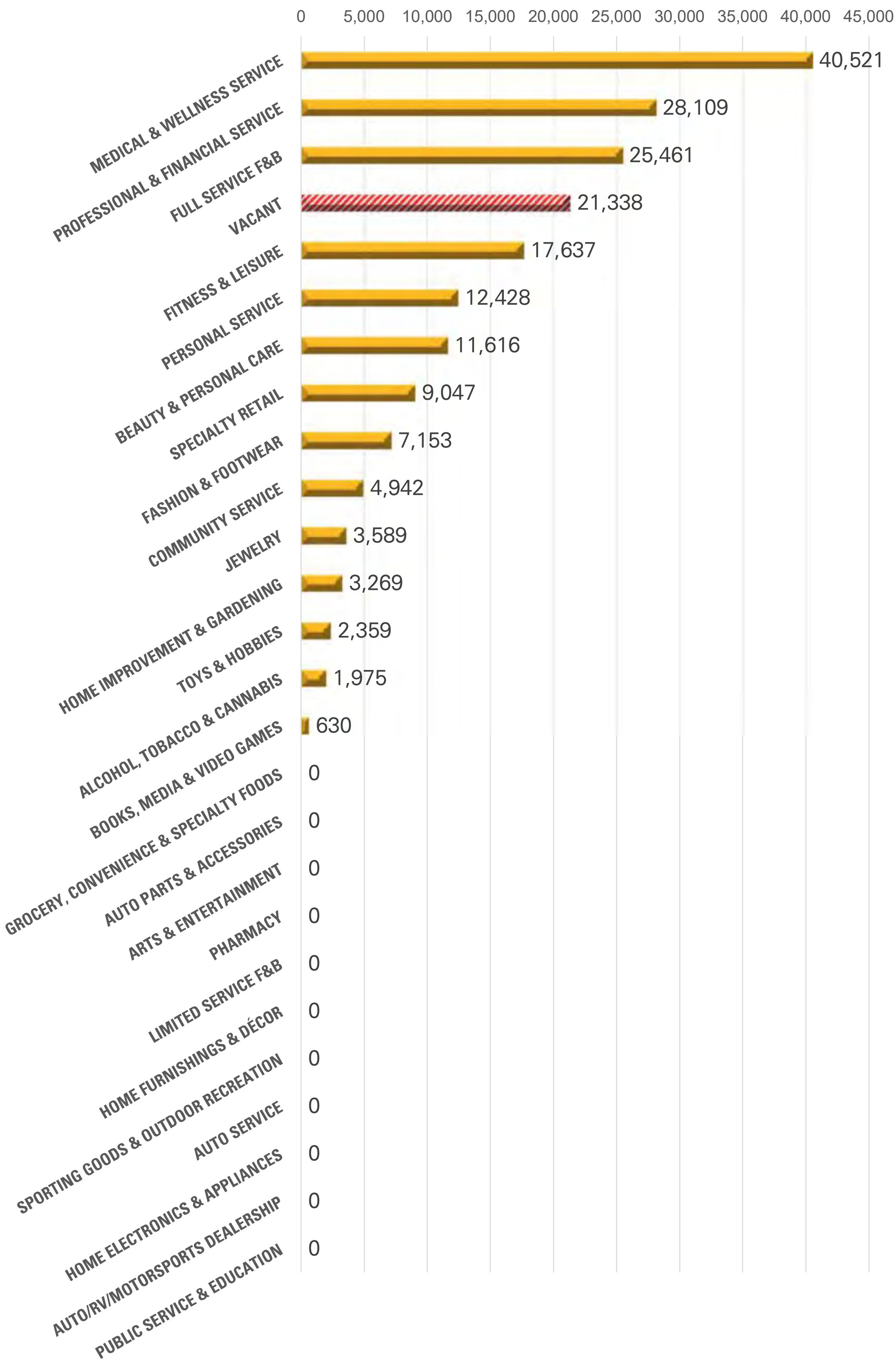


Table 4-3. Downtown Core Commercial Inventory by Merchandise Category

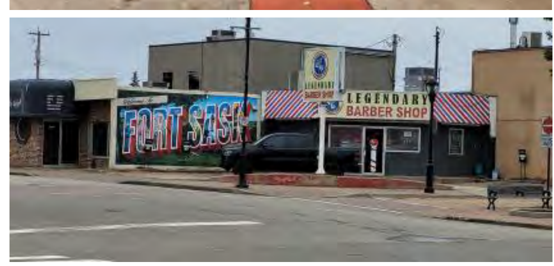
*(Source: FBM)*

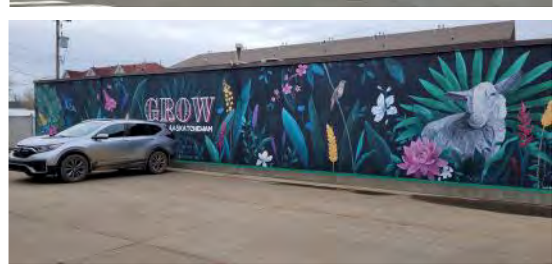
| MERCHANDISE CATEGORY | DOWNTOWN CORE FLOORSPACE (sq. ft.) | DOWNTOWN CORE MIX (%) |
|---|---|---|
| MEDICAL & WELLNESS SERVICE | 40,521 | 21.3% |
| PROFESSIONAL & FINANCIAL SERVICE | 28,109 | 14.8% |
| FULL SERVICE F&B | 25,461 | 13.4% |
| VACANT | 21,338 | 11.2% |
| FITNESS & LEISURE | 17,637 | 9.3% |
| PERSONAL SERVICE | 12,428 | 6.5% |
| BEAUTY & PERSONAL CARE | 11,616 | 6.1% |
| SPECIALTY RETAIL | 9,047 | 4.8% |
| FASHION & FOOTWEAR | 7,153 | 3.8% |
| COMMUNITY SERVICE | 4,942 | 2.6% |
| JEWELRY | 3,589 | 1.9% |
| HOME IMPROVEMENT & GARDENING | 3,269 | 1.7% |
| TOYS & HOBBIES | 2,359 | 1.2% |
| ALCOHOL, TOBACCO & CANNABIS | 1,975 | 1.0% |
| BOOKS, MEDIA & VIDEO GAMES | 630 | 0.3% |
| GROCERY, CONVENIENCE & SPECIALTY FOODS | 0 | 0.0% |
| AUTO PARTS & ACCESSORIES | 0 | 0.0% |
| ARTS & ENTERTAINMENT | 0 | 0.0% |
| PHARMACY | 0 | 0.0% |
| LIMITED SERVICE F&B | 0 | 0.0% |
| HOME FURNISHINGS & DÉCOR | 0 | 0.0% |
| SPORTING GOODS & OUTDOOR RECREATION | 0 | 0.0% |
| AUTO SERVICE | 0 | 0.0% |
| HOME ELECTRONICS & APPLIANCES | 0 | 0.0% |
| AUTO/RV/MOTORSPORTS DEALERSHIP | 0 | 0.0% |
| PUBLIC SERVICE & EDUCATION | 0 | 0.0% |
| **TOTAL** | **190,074** | |
| **Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)** | **95,164** | **50%** |
| **Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)** | **$17,310,150** | |
| | | |
| **Estimated Retail Sales Productivity ($/sf)** | **$182** | |











### *99th Ave Corridor Summary*

- Total GLA: 379,867 sf
- Vacancy: 17.9%
- Local Stores: 83%
- Branded Stores: 17%

As shown in **Figure 4-5**, the 99th Ave Corridor includes a mix of mid-size box stores, multi-story commercial buildings and stand alone stores. To the southwest lies the Fort Station site which is currently being redeveloped with commercial and residential uses.

**Figure 4-6** and **Table 4-4** represent the 99th Ave Corridor node's total inventory by retail merchandise category. The top 3 retail categories are:

- Grocery, Convenience & Specialty Foods (49,776 sf)
- Personal Service (37,027 sf)
- Beauty & Personal Care (21,392 sf)

All Downtown businesses under the "Grocery, Convenience & Specialty Foods" category are located in 99th Ave Corridor node.

99th Ave Corridor has both the highest vacant floorspace largely attributed to the ongoing redevelopment at the former Fort Mall, estimated at 29,161 sf. Given the ongoing redevelopment at the now Fort Station, it could be reasonably suggested that this building will likely form part of a residential redevelopment and thus be reduced from the retail inventory whereby only a smaller portion of retail should be retained fronting 99th Ave. By removing this from the retail inventory, the resulting 99th Ave Corridor vacancy would be reduced from 18% to 11%, which is still high, but much more manageable with an overall average retail vacancy of 2,733 sf.

Retail productivity along this well-traveled corridor provides a framework for success in the downtown because of the walkable proximity to the essential goods and services in the Downtown Core. These two retail nodes are essential parts of Fort Saskatchewan's healthy retail hierarchy.

Figure 4-5. 99th Ave Corridor Commercial Node

*(Source: FBM with data from the City of Fort Saskatchewan and Google)*

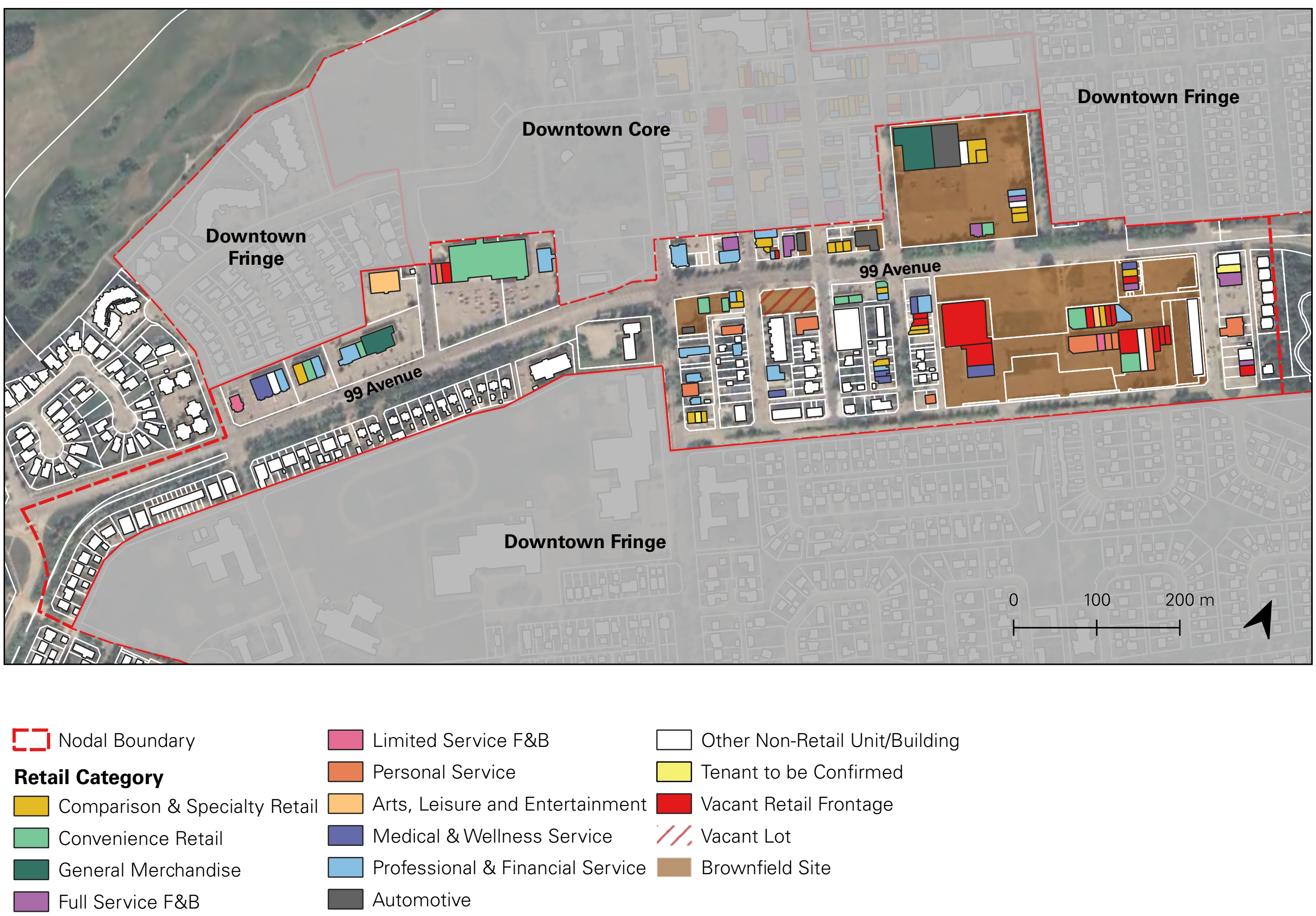


Figure 4-6. 99th Ave Corridor Inventory Total (Sorted Largest to Smallest Floorspace)

*(Source: FBM)*

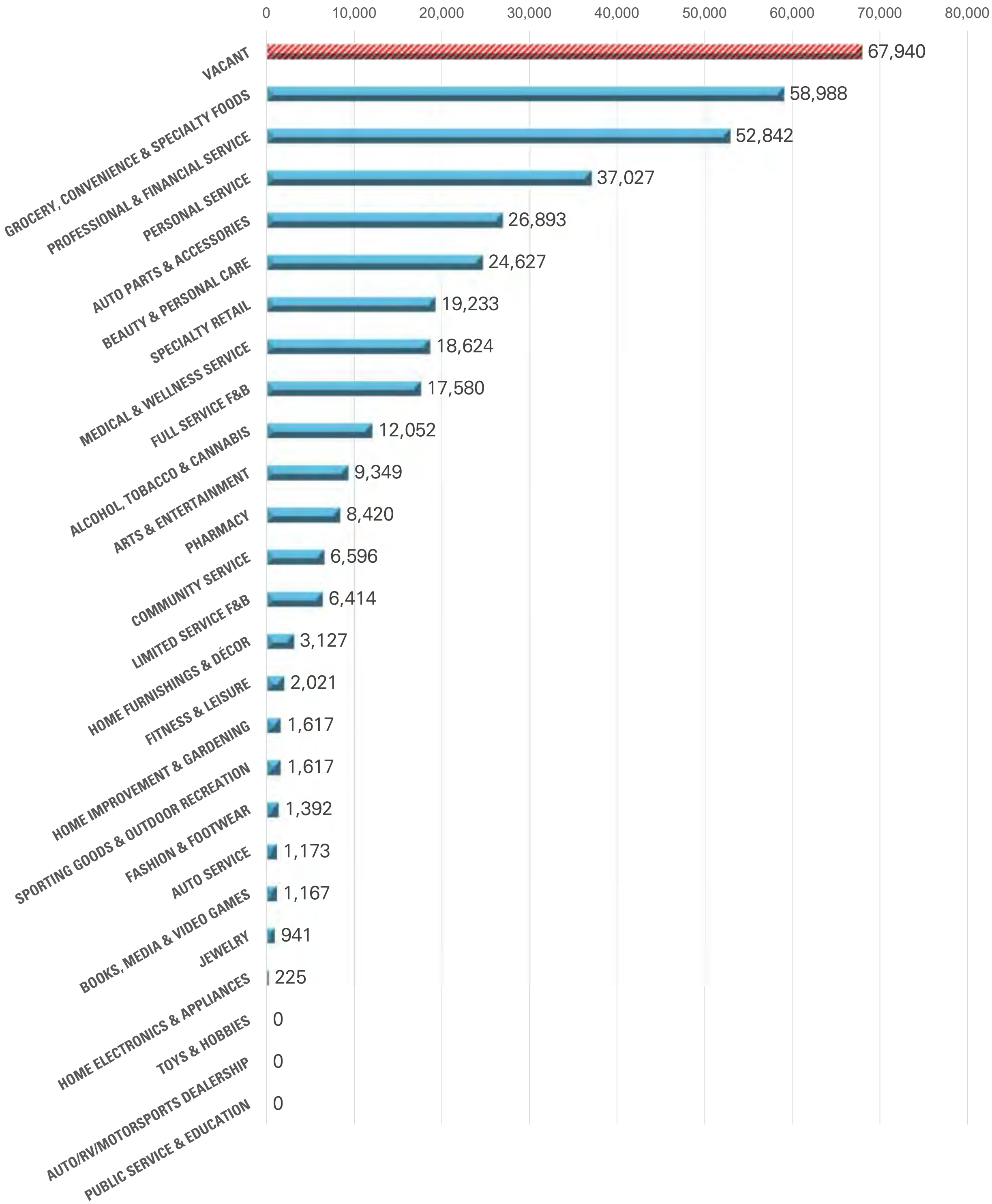


Table 4-4. 99th Ave Corridor Commercial Inventory by Merchandise Category
*(Source: FBM)*

| MERCHANDISE CATEGORY | 99 AVENUE CORRIDOR FLOORSPACE (sq. ft.) | 99 AVENUE CORRIDOR MIX (%) |
|---|---|---|
| MEDICAL & WELLNESS SERVICE | 18,624 | 4.9% |
| PROFESSIONAL & FINANCIAL SERVICE | 52,842 | 13.9% |
| FULL SERVICE F&B | 17,580 | 4.6% |
| VACANT | 67,940 | 17.9% |
| FITNESS & LEISURE | 2,021 | 0.5% |
| PERSONAL SERVICE | 37,027 | 9.7% |
| BEAUTY & PERSONAL CARE | 24,627 | 6.5% |
| SPECIALTY RETAIL | 19,233 | 5.1% |
| FASHION & FOOTWEAR | 1,392 | 0.4% |
| COMMUNITY SERVICE | 6,596 | 1.7% |
| JEWELRY | 941 | 0.2% |
| HOME IMPROVEMENT & GARDENING | 1,617 | 0.4% |
| TOYS & HOBBIES | 0 | 0.0% |
| ALCOHOL, TOBACCO & CANNABIS | 12,052 | 3.2% |
| BOOKS, MEDIA & VIDEO GAMES | 1,167 | 0.3% |
| GROCERY, CONVENIENCE & SPECIALTY FOODS | 58,988 | 15.5% |
| AUTO PARTS & ACCESSORIES | 26,893 | 7.1% |
| ARTS & ENTERTAINMENT | 9,349 | 2.5% |
| PHARMACY | 8,420 | 2.2% |
| LIMITED SERVICE F&B | 6,414 | 1.7% |
| HOME FURNISHINGS & DÉCOR | 3,127 | 0.8% |
| SPORTING GOODS & OUTDOOR RECREATION | 1,617 | 0.4% |
| AUTO SERVICE | 1,173 | 0.3% |
| HOME ELECTRONICS & APPLIANCES | 225 | 0.1% |
| AUTO/RV/MOTORSPORTS DEALERSHIP | 0 | 0.0% |
| PUBLIC SERVICE & EDUCATION | 0 | 0.0% |
| **TOTAL** | **379,867** | |
| **Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)** | **205,799** | **54%** |
| **Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)** | **$74,877,126** | |
| **Estimated Retail Sales Productivity ($/sf)** | **$364** | |






## 4.5 Overall Retail Vacancy

A review of the current vacancy and nature of the vacancies provides additional cues for prospective business interests in the community. The current overall vacancy of the total downtown is estimated at 15.7% but this drops to 9.8% when excluding the specific vacancies discussed in the Downtown Core and 99th Ave Corridor nodes. Given that 4-5% is considered a healthy retail environment in an industry-accepted comparable, Downtown Fort Saskatchewan still higher overall vacancy, meaning that active promotion of downtown vacancies should be pursued vigorously with property owners and the general public for incubating local retail businesses.

## 4.6 Retail Space Per Capita

Utilizing data from FBM's extensive retail inventory tabulation in conjunction with Demographic Data provided by Statistics Canada and Manifold Data Mining Inc., the approximate retail space per capita ratio has been estimated for Downtown Fort Saskatchewan.

As a starting point, **Figure 4-7** depicts the Target Retail Space Per Capita, which provides a baseline for determining how much retail per capita is best suited to a community, according to its population size.

How much retail a community is able to support is crucial for determining future land use plans: a local government wants to have as much evidence as possible to demonstrate to potential retailers the opportunity and untapped potential in their community. Per Capita ratios can also be used as a methodology to gauge future demand, if and as population growth occurs.

The current retail space per capita, as calculated by FBM takes into account a trade area beyond simply Fort Saskatchewan's geopolitical boundary, by using a drive time analysis and other criteria to form the retail trade area (as noted previously).

**Figure 4-7** depicts the relationship between a community's retail trade area size and the per capita floorspace ratio that ensures a community is not over-retailed, but rather in balance with demand drivers. Many location specific factors contribute to an area's overall retail market, and cannot be addressed in a general chart or graph. Such locational factors can include specialized demands of a community, or unique characteristics that warrant certain retail traits. Aside from unique locational factors that each retail trade area has, **Figure 4-7** provides beneficial direction and insight for communities of their retail market.

In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita is in range of 30 sf to 40 sf (International Council of Shopping Centres).

This figure can be misleading however, as this accounts for organized shopping centre space only in centres larger than 10,000 sf. Therefore, when factoring in all retail including street front retail, urban markets can be higher than this figure.

Using **Figure 4-7** as a benchmark for retail space in communities and for a comparable study area like Downtown Fort Saskatchewan, this figure should fall in the 15-20 sf per capita range. Accordingly, the estimated retail space per capita ratio for Fort Saskatchewan and its almost 30,000-person city-delineated retail trade area (FSTA) is in the range of 20 sf/capita.

For example,the FSTA of 29,972 residents supporting a per capita ratio of 20 sf would result in a total supportable inventory of 597,440 sf of which downtown currently has a share of 300,963 sf or 50.4% of this supportable demand. Using this same approach over the next 10 years with population growth to a conservative 36,791 the total supportable demand by FSTA at 20 sf per capita could be 735,820 sf. If the same 50% ratio of downtown to external demand were continued, then this suggests a total of 69,710 sf of new retail demand could be supportable in the downtown.

## 4.7 Value of a Balanced Retail Hierarchy to Community Economic Health

**Figure 4-8** illustrates an overall healthy retail hierarchy that takes into account multiple attributes that further speak to the magnitude of retail opportunity and how important it is to make sure that patterns of retail development are matched with population and housing. In the context of Fort Saskatchewan and its downtown, the diagram highlights where the downtown currently sits in the community's retail hierarchy, in which there is an essential and central role for the downtown.

A well-planned retail hierarchy as presented in **Figure 4-8** ensures that businesses of all sizes, especially local, independent ones, can thrive. Main streets and downtowns, like that in Fort Saskatchewan are critical for incubating and supporting small businesses, while larger retail nodes or corridors accommodate the broader desired and necessary branded national chains and larger format retailers. This balance helps keep local dollars circulating within the community and provides diverse shopping options for residents.

Figure 4-7. Downtown Fort Saskatchewan Retail Space Per Capita

*(Source: FBM)*

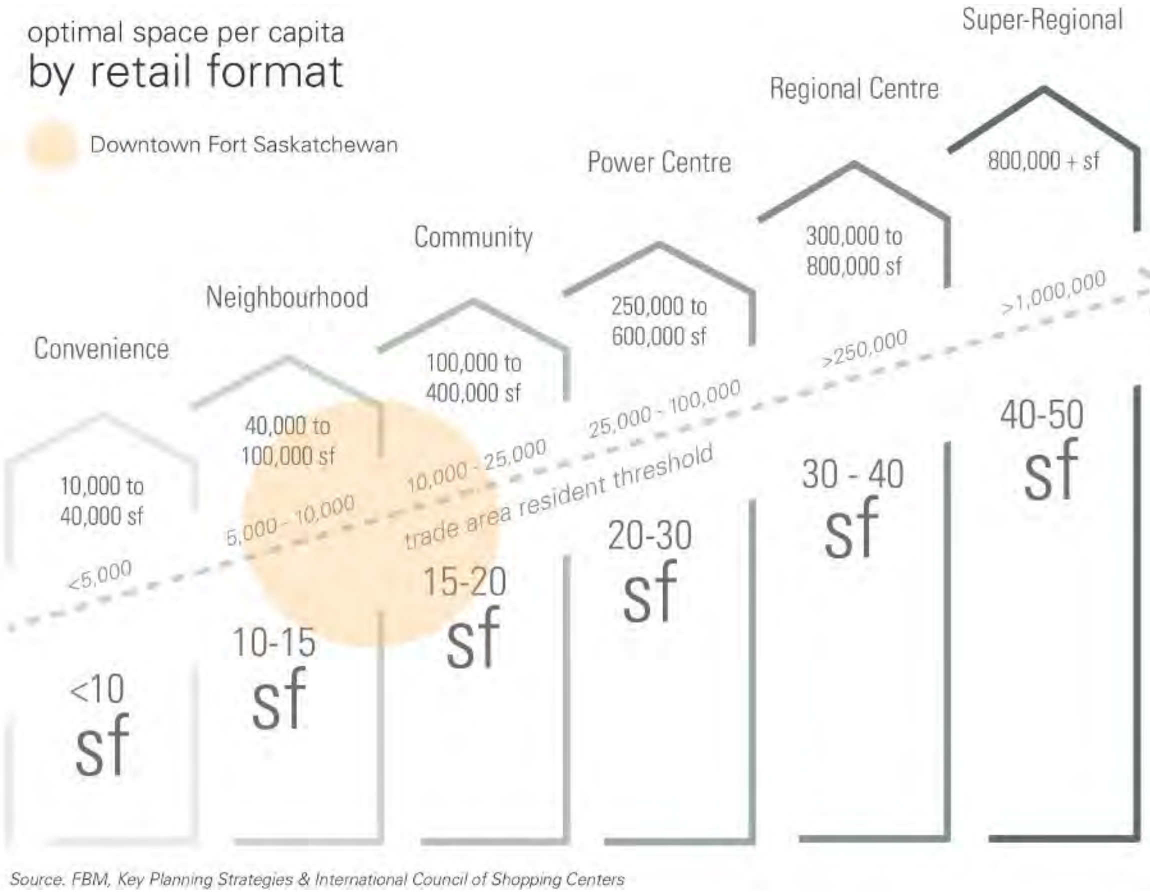



Figure 4-8. Downtown Fort Saskatchewan Retail Hierarchy & Relationship with Overall City

*(Source: FBM)*

Downtown Fort Saskatchewan is critical for fostering community cohesion, social interaction and civic engagement, and creating public spaces where residents gather. Events, public spaces, and a mix of retail, dining, and entertainment can help strengthen community ties, making Fort Saskatchewan a vibrant place to live. These areas serve as the "heart" of the community, where people come together for shared experiences. Importantly, a thoughtful retail hierarchy helps prevent sprawl. Main streets, mixed-use developments and traditional downtowns encourage walkability and reduce car dependency, as shown in the diagram above relative to each retail format and which become even more prominent when more housing is developed within, adjacent to or in direct proximity of. This leads to more sustainable, eco-friendly growth that can preserve Fort Saskatchewan's character while accommodating expansion or intensification of retail in strategic and compatible areas.

A healthy retail environment is essential to ensure that Fort Saskatchewan is attractive to existing, but particularly new residents and businesses. Main streets and vibrant downtowns, with their unique shops and public spaces, appeal to people looking for a sense of community. Meanwhile, larger nodes provide the convenience and variety that businesses and residents seek, making the town an attractive place to live and invest. Fort Saskatchewan's downtown is particularly unique because it offers both, above all within walking and in proximity to neighbourhoods where future residential development can be serviced and prioritized.

## 4.8 Benefits of Housing Diversity for Fort Saskatchewan's Downtown Retail Ecosystem

Across the retail industry, the adage "retail follows rooftops" has proven to be true. In the case of Fort Saskatchewan's growth as a city, this is adage is also true. However, over time as retail became more prominent across the city along Hwy 21 and the broader region to Northeast Edmonton and Sherwood Park, the influence of nearby residential support for the downtown has declined because the amount of adjacent residential and overall housing mix still reflects a time when the downtown was the core retail location. This is why the amount and type of housing mix must continue to be prioritized within and in proximity to the Downtown to ensure that the current amount of retail floorspace and retail opportunity can be supported and economically viable for the business owners and operators.

The importance of increasing the amount and diversifying the mix of housing in and around the downtown, is not only to provide a solid consumer base for retailers in walkable or more locally accessible location, but because it promotes a healthier community overall. From a retail perspective, a diverse housing stock for both customers and employees are also critical for supporting existing businesses and attracting new ones.

A mix of housing options especially in proximity to the downtown allows lower-income individuals to live near higher-income households, contributing to a more balanced economic ecosystem. This can lead to increased overall spending in local businesses, as different groups of people have different consumption habits and preferences. This blending of consumer segments also creates a wider and more varied customer base, supporting local retail by ensuring a steady and diverse stream of consumers. Retailers benefit from having customers with different needs and purchasing capacities, helping to stabilize sales across economic cycles.

Housing diversity supports long-term community stability by preventing the displacement of low- and middle-income residents. This stability fosters a reliable customer base for businesses, as families and individuals can remain in the area and continue supporting local stores.

Overall, the retail hierarchy as presented in this summary, particularly the presence of Downtown Fort Saskatchewan must be considered one of its most valuable assets, is essential to the economic, social, and cultural health of the community. New businesses often prefer to set up shop in vibrant, diverse communities where a mix of people live and work. It provides a framework for orderly development, supports the local economy, and fosters strong community ties, contributing to the town's overall economic vitality and sustainability.

A diverse housing stock in proximity to Fort Saskatchewan's downtown is essential for the health and growth of the retail sector and supports the ideal retail hierarchy. It helps existing businesses by broadening their customer base and stabilizing their workforce, while making the community more attractive for potential new businesses by ensuring access to a varied and available talent pool. Broadly speaking, diverse housing contributes to economic diversity and overall community vibrancy, which are key factors in the sustainability and success of retail environments.

# 5.0 Community Survey

## 5.1 Introduction

A community survey was conducted by FBM to inform the Gap Analysis. The purpose of this survey was to obtain feedback from residents of, and visitors to, Fort Saskatchewan to identify current shopping preferences and patterns, the types of businesses the community would like to see, and where they should be located.

The online survey was conducted in English and was shared with community members through the Fort Saskatchewan Facebook page (organic views and paid ads) and city website, as well as the Rediscover Downtown website.

The survey was open between June 6 - 24 2024 and gained 817 online responses and 5 paper submissions. Fort Saskatchewan staff also hosted a market popup on June 6th and 21st to advertise the survey and engage with residents (**Figure 5-1**). They interacted with approximately 100 people and received 26 survey submissions. A total of 848 survey submissions were received. The majority of respondents (77%) reported living within Fort Saskatchewan but outside of Downtown. Downtown Fort Saskatchewan residents represented 17.7% (148) of respondents.

Figure 5-1. Areas people love in Downtown Fort Saskatchewan

*(Source: City of Fort Saskatchewan - Market engagement for Gap Analysis survey)*


The following is an aggregated summary of the total survey results. The full list of survey questions and results is provided in **Appendix B.**

## 5.2 Visitation

Most respondents (42.7%) visit Downtown weekly. Monthly visitors account for an additional 27.6% of respondents, while daily visitors account for 14.6% of respondents. Most respondents (46.4%) stay Downtown between 30-60 minutes per visit. Visits lasting less than 30 minutes, and trips lasting 1-2 hours represented 22.5% and 22.1% of respondents respectively.

Visiting specific retailers/businesses was selected by the majority (61.5%) of residents as the primary reason they visit Downtown. Nearly half of all respondents (46.3%) report that events are their a primary reason for visiting Downtown.

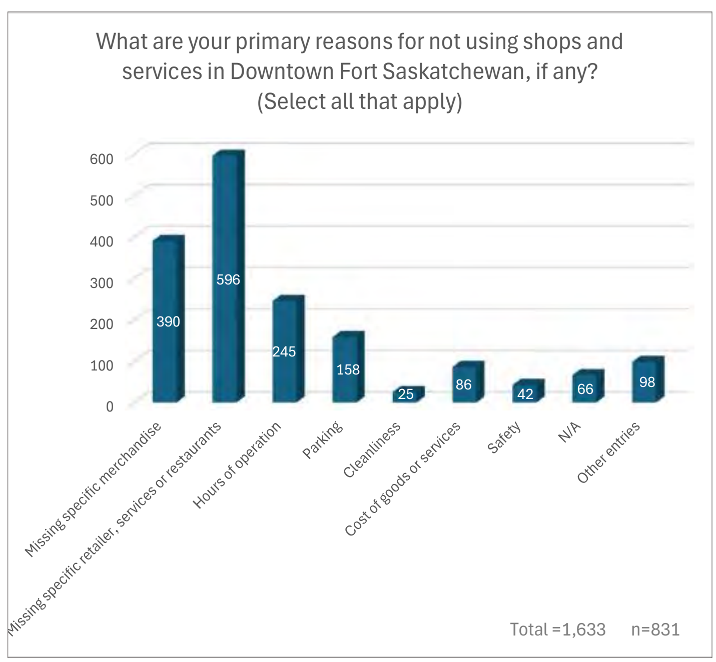
"Favourite places" in Downtown include Parks & Farmer's Market, Library, bakeries, Bear's Den, Murals, Trails, Atlantic Kitchen, Eggcelent Pete's and Millers.

## 5.3 Gaps in Goods and Services

Missing specific retail, services or restaurants was selected by the majority (71.7%) of respondents as a primary reason they don't visit Downtown. Missing specific merchandise was the next most common reason selected by 46.9% of residents (**Figure 5-2**).

Figure 5-2. Primary reasons for not using shops and services Downtown

*(Source: FBM with survey data)*



Sit down restaurants & pubs were selected by 70.3% of respondents as shops they would visit more often Downtown if they were available. Fashion and accessories (58.4%) and sporting goods, books and hobbies (51.4%) stores were also desired by the majority of respondents (**Figure 5-3**).

In the open ended survey responses summarized in **Figure 5-4** (509), respondents reported a desire for more unique local draws and destinations Downtown. Respondents expressed that if Downtown was to draw them in, they would need to offer something different from Fort Saskatchewan's highway commercial areas which offer easy convenience and a variety of goods and services in a big box format. Downtown was perceived to be in competition with these areas with the common sentiment that there's "not much" Downtown that you can't get elsewhere. Nearby commercial areas like Sherwood Park and Edmonton also draw shoppers away. Ideas for increasing Downtown draws commonly included:

- More events (e.g. street closures, night market, cultural events);
- Greater variety of shops:
  - Sit down restaurants, coffee shops/ cafes, breweries and butchers;
  - More shops and services for kids, youth and families, particularly recreation and entertainment;
  - Bookstores, hobby and music shops;
- Indoor and outdoor recreation opportunities year-round for all, especially for families.

Many respondents expressed appreciation and enjoyment of Downtown for its beauty, walkability, proximity to parks and recreation, and recent investments in public spaces and storefronts. There was a strong desire amongst respondents for more places to socialize and linger Downtown, especially outdoors. Patios and sidewalk cafes were frequently encouraged. Few respondents reported being aware of the City's Sidewalk Cafe program which was revised and relaunched in 2020.

There were also common calls to freshen up storefronts Downtown, including through removing derelict buildings and infilling vacant lots such as the former mall site and former Husky Oil site. Some respondents also reported concerns about their personal safety when visiting Downtown. There were also reports that Downtown businesses have been and are struggling with rent and remaining open. Some respondents stated they don't understand why investments continue to be made into the Downtown and what benefits those investments have had.

Housing was also recognized as a pressing local need which future Downtown development can address.

Figure 5-3. Desired shops and services Downtown

*(Source: FBM with survey data)*

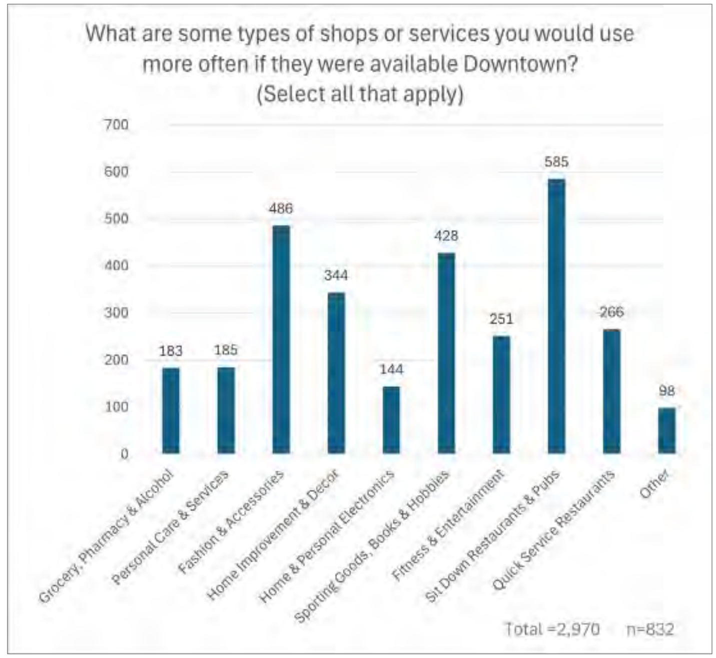



Figure 5-4. Verbatim Survey Respondent Quotes

*(Source: FBM with survey data)*

Downtown really is the best part of Fort!

It [Downtown] looks great, there just isn't much to do.

I love Fort Sask

So beautiful, love the trees and murals, just wish there was more variety of shops.

It [Downtown] needs an identity.

I like downtown but I forget what stores are there.

We need some sort of unique experience, retail or otherwise, that will bring people out of their way to access it which would hopefully benefit other businesses too.

Everything in this city is a duplicate or triplicate we need a better variety.

Unless there is a specific reason to be there, we don't go.

It seems like all Fort Sask cares about is downtown.

I don't understand why so much time and effort and money is being utilized to revitalize a downtown.... our downtown has very little to offer

Give it up. Downtown is dead

# 6.0 Market Demand Analysis

## 6.1 Introduction

The following section will assess the amount of supportable retail floorspace in Fort Saskatchewan's downtown premised on estimates of the current market share of total available retail spending by the existing City Trade Area boundary (FSTA) combined with miscellaneous spending. This process will forecast demand in terms of floorspace (square footage) over the next decade that could potentially be supported as the downtown continues to revitalize, redevelop and redefine its mix and positioning within the overall Fort Saskatchewan retail hierarchy (refer to **Figure 4-7**).

## 6.2 Methodology

Using the FSTA as the dominant trade area segment for downtown, demand forecasts are predicated on applying population projections over the next decade for the city within which it can be expected that a portion of that growth will be drawn to new residential development in or around the defined downtown area.

With this understanding of the retail market dynamic and population growth and the results of the consumer survey, **the key to forecasting new floorspace demand looks at firstly quantifying how much market share the downtown retail businesses garner from the FSTA + Miscellaneous Inflow spending.**

These market share calculations are derived from FBM's extensive analysis of the current downtown retail inventory, against which retail sales productivity estimates were sensitized and applied to each of the respective categories to provide an indication of the current estimated retail sales that downtown Fort Saskatchewan businesses are generating.

As noted previously, a reasonable sounding board for retail productivities are the lease rates which in downtown are estimated to be in the range of +/- 15 per sf. On this basis, it is estimated that retail sales productivities in the community would average in the $150 to $200 per sf range with the possible exception of conveniences which could be in the range of $400 to $600 per sf, particularly in the Coop Marketplace area.

By dividing the total FSTA + Miscellaneous Inflow retail spending potential into the category-specific retail sales productivity estimates (measured in $/sf), the estimated market share percentages could be calculated from which a measure of supportable floorspace can be determined.

## 6.3 Market Share Demand

The results of this approach is shown in **Table 6-1** which quantifies the total estimated market share of retail spending in Fort Saskatchewan's downtown. **Table 6-1** reveals that Fort Saskatchewan's retail offering currently garner just over 10% of the available trade area spending. This means that almost 90% of the resident trade area spending is spent outside of the downtown.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing 20% of the trade area spending. In general, the day-to-day conveniences in the downtown perform adequately for the market size, which is testament to the proximity and quality of the offering along the 99th Ave corridor

Because of some very strong local businesses in the downtown, categories like Jewelry, Books & Media and Specialty Retail exhibit healthy market shares and are indicative of the type of unique businesses that are most compatible within the downtown. Additionally, categories like full service Restaurants & Pubs and Fitness & Leisure also illustrate healthy market dynamics in the downtown.

The areas of general weakness in terms of market share are categories such as Fashion & Accessories, Home Furniture & Decor, Appliances & Electronics, Toys & Hobbies, Home Improvement and Quick Service F&B. Target categories that would be most compatible in terms of spatial needs would be Fashion, Home Decor, Toys & Hobbies and Quick Service F&B. The full service restaurant sector is still recovering from the COVID-19 pandemic where CERB loans came due and resulted in a number of closures nationwide. Nonetheless as part of the recover, there is an opportunity for future growth, most likely to be in the form of new-to-market local or franchise food & beverage formats.

Forecasts to 2034 as shown in **Table 6-2 and Table 6-3** are premised on conservative, maintained rates of market share and reveal demand for just under 135,000 sf of new floorspace. Not all of this floorspace would be in the form of new space but rather a combination of existing vacancies which currently account for almost 90,000 sf, or 67% of the forecasted demand. This would leave approximately 45,000 sf that could be accommodated in new build or infill developments.

From the perspective of available lands in the downtown, this figure for new build seems reasonable and achievable.

Table 6-1. Estimated Market Share Retention of Retail Spending in Downtown Fort Saskatchewan (2024)

*(Source: FBM & Manifold Data Mining Inc.)*

| Retail Spending by Merchandise Category | | 2024 CITY OF FORT SASKATCHEWAN Sales Productivity ($psf) | 2024 CITY OF FORT SASKATCHEWAN Estimated Market Share | 2024 Market Share Sales $ | 2024 Current Retail Floorspace (sf) |
|---|---|---|---|---|---|
| Convenience & Day-to-Day Goods/Services | Grocery & Specialty Foods | $562 | 20% | $33,158,928 | 58,988 |
| | Pharmacy | $480 | 27% | $4,041,654 | 8,420 |
| | Alcohol, Tobacco & Cannabis | $383 | 49% | $5,374,068 | 14,028 |
| | Personal Services | $159 | 15% | $7,858,433 | 49,455 |
| | *Health Care & Medical (not applicable)* | | 0% | | |
| Comparison or Department Store Type Merchandise (DSTM) Goods/Services | Fashion & Accessories | $137 | 3% | $1,172,817 | 8,545 |
| | Jewelry | $329 | 46% | $1,488,865 | 4,530 |
| | Beauty & Personal Care | $146 | 18% | $5,298,755 | 36,242 |
| | Home Furniture & Décor | $220 | 6% | $687,910 | 3,127 |
| | Appliances & Electronics | | 0% | $81,090 | 225 |
| | Home Improvement & Gardening | $185 | 2% | $901,642 | 4,886 |
| | Books & Media | $157 | 28% | $281,944 | 1,797 |
| | Sporting Goods | | 2% | $347,988 | 1,617 |
| | Toys & Hobbies | $141 | 2% | $331,665 | 2,359 |
| | Specialty Retail | $178 | 24% | $5,044,066 | 6,414 |
| Leisure, Recreation & Entertainment Goods/Services | Quick Service F&B | $328 | 5% | $2,105,292 | 6,414 |
| | Restaurants & Pubs | $230 | 15% | $9,916,813 | 43,041 |
| | Arts & Entertainment | $140 | 7% | $1,308,882 | 9,349 |
| | Fitness & Leisure | $140 | 38% | $2,752,096 | 19,658 |
| Automotive Goods (excluding repair) | Auto Parts & Accessories | $373 | 19% | $10,034,369 | 26,893 |
| | Auto/RV/Motorsports Dealerships | | 0% | $0 | - |
| | *Auto Fuel (not applicable)* | | | | |
| | TOTAL RETAIL CATEGORIES ONLY | $301 | 10.2% | $92,187,275 | 305,990 |
| | TOTAL (excluding Auto) | $294 | 12.6% | $82,152,906 | 279,097 |

In terms of future potential competitive influences for downtown, the most notable to be aware of in the future is Fort Saskatchewan Common, located along the north side of Hwy 21. This particular development is proposing a mixed-use town centre format that could be attractive to a mix of local to branded tenants. However, downtown Fort Saskatchewan will continue to be a more affordable location for local tenants and start ups as rents at Fort Saskatchewan Common will be at the higher end of the leasing spectrum. Regardless, the competitive nature of the spaces will be a competitive factor for downtown in attracting new-to-market businesses.

Table 6-2. Estimated Retail Demand by 2034 (Based on Maintaining Current Market Share)

*(Source: FBM & Manifold Data Mining Inc.)*

| Retail Spending by Merchandise Category | | 2034: CITY OF FORT SASKATCHEWAN Sales Productivity ($psf) | 2034: CITY OF FORT SASKATCHEWAN Estimated Market Share | 2034: Market Share Sales $ | 2034: Total New Retail Floorspace (sf) | 2024 TO 2034: Current City Retail Inventory (sf) | 2024 TO 2034: Total Cumulative NEW Floorspace Demand (sf) |
|---|---|---|---|---|---|---|---|
| Convenience & Day-to-Day Goods/Services | Grocery & Specialty Foods | $562 | 20% | $44,598,471 | 20,351 | 58,988 | 20,351 |
| | Pharmacy | $480 | 27% | $5,434,993 | 2,903 | 8,420 | 2,903 |
| | Alcohol, Tobacco & Cannabis | $383 | 49% | $7,227,466 | 4,838 | 14,028 | 4,838 |
| | Personal Services | $159 | 15% | $10,603,999 | 17,279 | 49,455 | 17,279 |
| | *Health Care & Medical (not applicable)* | | | $0 | | | |
| Comparison or Department Store Type Merchandise (DSTM) Goods/Services | Fashion & Accessories | $137 | 3% | $1,580,700 | 2,972 | 8,545 | 2,972 |
| | Jewelry | $329 | 46% | $2,010,798 | 1,588 | 4,530 | 1,588 |
| | Beauty & Personal Care | $146 | 18% | $7,150,084 | 12,663 | 36,242 | 12,663 |
| | Home Furniture & Décor | $220 | 6% | $928,283 | 1,093 | 3,127 | 1,093 |
| | Appliances & Electronics | $0 | 0% | $109,468 | | 225 | 0 |
| | Home Improvement & Gardening | $185 | 2% | $1,216,633 | 1,707 | 4,886 | 1,707 |
| | Books & Media | $157 | 28% | $380,781 | 630 | 1,797 | 630 |
| | Sporting Goods | $0 | 2% | $469,772 | | 1,617 | 0 |
| | Toys & Hobbies | $141 | 2% | $447,744 | 826 | 2,359 | 826 |
| | Specialty Retail | $178 | 24% | $6,797,579 | 31,697 | 6,414 | 31,697 |
| Leisure, Recreation & Entertainment Goods/Services | Quick Service F&B | $328 | 5% | $2,821,653 | 2,182 | 6,414 | 2,182 |
| | Restaurants & Pubs | $230 | 15% | $13,254,935 | 14,488 | 43,041 | 14,488 |
| | Arts & Entertainment | $140 | 7% | $1,766,135 | 3,266 | 9,349 | 3,266 |
| | Fitness & Leisure | $140 | 38% | $3,702,512 | 6,789 | 19,658 | 6,789 |
| Automotive Goods (excluding repair) | Auto Parts & Accessories | $373 | 19% | $13,494,877 | 9,275 | 26,893 | 9,275 |
| | Auto/RV/Motorsports Dealerships | $0 | 0% | $0 | | 0 | 0 |
| | *Auto Fuel (not applicable)* | | | | | | |
| | TOTAL RETAIL CATEGORIES ONLY | $281 | 10.2% | $123,996,883 | 134,545 | 305,990 | 134,545 |
| | TOTAL (excluding Auto) | $273 | 12.6% | $110,502,006 | 125,270 | 98,129 | 125,270 |

Table 6-3. Estimated Retail Demand Summary 2024 to 2034 (Based on Maintaining Current Market Share)

*(Source: FBM & Manifold Data Mining Inc.)*

| Retail Merchandise Category | 2024 | 2029 | 2034 | 2024 TO 2034 | |
|---|---|---|---|---|---|
| | Current Floorspace Supply (sf) | Cumulative NEW Floorspace Demand (sf) | Cumulative NEW Floorspace Demand (sf) | Current Retail Inventory (sf) | Total Future NEW Demand (sf) |
| Convenience & Day-to-Day Goods/Services | 130,891 | 21,484 | 45,370 | 130,891 | 45,370 |
| Comparison or Department Store Type Merchandise (DSTM) | 69,743 | 36,688 | 53,175 | 69,743 | 53,175 |
| Leisure, Recreation & Entertainment Goods/Services | 78,462 | 12,664 | 26,725 | 78,462 | 26,725 |
| Automotive Goods (excluding repair) | 26,893 | 4,393 | 9,275 | 26,893 | 9,275 |
| **Total (sf)** | **305,990** | **75,230** | **134,545** | **305,990** | **134,545** |

# 7.0 Action Plan

## 7.1 Introduction

Downtown Fort Saskatchewan continues to forge a path for renewal through its various progressive investment/reinvestment initiatives. In many respects these have had some success, but there are other avenues that could be considered both for business owners as well as property owners and future developers. Given the analysis in this study has identified opportunities for targeted retail and business attraction, this summary outlines the current successes as well as future opportunities that could supplement and support Fort Saskatchewan's Downtown Action Plan.

Regardless of the investment or incentives directions pursued by the City, a major recommendation is for the City to continue focusing public education on the economic and social benefits of investing in downtown. Survey results suggest people don't understand why and that contributes to frustration and confusion around spending choices. It is also suggested that the City continued promotion of the Downtown Fort Saskatchewan identity/brand because some residents still not aware of it. Moreover, for those new and particularly future residents, downtown should become a major selling proposition for residential and business site selection.

## 7.2 Downtown Action Plan Review

In total, 43 Storefront Applications have been approved for Downtown businesses. Since 2019, 10 Downtown businesses have received Storefront Application Approvals.

Downtown is recognized as the heart of the community and the survey did identify widespread public support for the revitalization efforts in the downtown as well as the beautification and placemaking investments.

Fort Saskatchewan's Downtown Action Plan was approved by city council in June 2021. The goals of the plan are to:

- Increase the number of visitors to the downtown;
- Increase the frequency in which visitors come downtown;
- Increase the length of time visitors stay downtown; and
- Increase private-sector investment in the downtown.

Among the plan's recommendations was the establishment of downtown development incentives, outlined below.

***Economic Incentives:***

In accordance with the recommendations of the Downtown Action Plan, the City of Fort Saskatchewan has begun introducing economic incentives designed to promote development within the downtown area. On 24 May 2022, city council voted to establish two new "Downtown Development Incentives": the Brownfield Tax Exemption and the Downtown Development Grant. Developers may only take advantage of one incentive, not both, in relation to a given project.

***Brownfield Tax Exemption***

The Brownfield Tax Exemption (Bylaw C15-22) aims to encourage residential development downtown. It applies only to specific designated properties, all of which are located downtown, and are considered brownfield sites, defined as properties that could be contaminated; are vacant or under-utilized; and which are suitable for redevelopment.

The tax exemption provides a 100% waiver of the municipal portion of property taxes on new multi-unit and mixed-use residential development on the aforementioned properties for a period of up to 15 years. The total value of the tax exemption cannot exceed 5% of "eligible capital costs" as defined by the bylaw.

To be eligible for the tax exemption, the project must be new construction of a minimum of two storeys, and provide a minimum number of dwelling units depending whether it is a multi-unit residential building (six dwelling units minimum) or a mixed-use development (three dwelling units minimum).

***Downtown Development Grant***

While eligibility for the Brownfield Tax Exemption is relatively narrow in geographic terms, applying only to around ten eligible properties, the Downtown Development Grant covers a wider portion of Downtown Fort Saskatchewan (but not the entire district).

The Downtown Development Grant reimburses the equivalent of three per cent of the eligible capital costs to create a mixed-use or multi-unit residential development. The grant is paid following completion of the project.

Like the Brownfield Tax Exemption, the Downtown Development Grant is for new construction only. Properties that received a Brownfield Tax Exemption are not eligible for the grant.

***Other city-wide incentives***

Aside from the aforementioned downtown incentives, the city offers a Business Development Incentive Program across the entire city. Municipal staff commented that the program is popular, in particular the Storefront Improvement grant, which is a matching grant providing applicants up to $10,000. Other grants are available for business development, education, equipment and technology, and marketing.

***Slow downtown incentives uptake = need for promotion***

To-date there has been slow uptake of either downtown incentive to date. Although one infill development is underway in the downtown area, it launched too early for the developer to take advantage of either municipal incentive. Municipal Staff conversations with developers about the incentives found that the absence of interest seemed to be the result of a lack of promotion on the part of the city, suggesting that promotional platforms should be expanded to help raise awareness of the incentive programs.

***Potential future incentives***

Municipal staff stated that they have heard from downtown property owners that it is challenging for them to convert upper-floor vacant spaces into residential space. They are informally considering introducing some kind of "micro-incentive" to address this need.

Staff are also considering some form of tenant improvement incentive to provide support to businesses (as opposed to property owners) who wish to improve leased spaces.

## 7.3 Case Study Research Summary: Downtown Development Incentives

The downtown areas of many North American cities suffered from disinvestment in the mid-to-late 20th century. In response, municipalities have made various economic, urban design, and land-use policy interventions intended to revitalize their town centres by promoting growth and development there. Relevant measures identified to date from case study examples are outlined below, realizing that Fort Saskatchewan is also considered at the forefront of some of these, yet still there may be opportunities to pursue to further Downtown Fort Saskatchewan's revitalization and redevelopment investment. Case studies examined by FBM include the following:

- City of St. Albert
- City of Airdrie
- City of Leduc
- City of Grande Prairie
- City of Maple Ridge
- City of Kitchener
- Regional Municipality of Wood Buffalo
- City of Windsor
- City of Sault Ste. Marie

### 7.3.1 Grants

The case study municipalities make available, to business and property owners, a variety of grants intended to stimulate downtown redevelopment and revitalization. These often take the form of a 50 per cent matching grant (up to a prescribed limit), or a defined sum. To ensure compliance, grants are generally provided in the form of a reimbursement following satisfactory completion of a project to program requirements.

**Shopfront beautification and improvement grants** are common. There are grants for both temporary/seasonal beautification projects as well as permanent renovation works. Stated goals of these types of grants include improving the exterior appearance of downtown shops, enhancing the pedestrian realm, and generally making downtown more vibrant. Examples of temporary or non-building-related improvements covered by such grant programs include window displays, planter installation, holiday lighting, street furniture, and bike racks.

**Building exterior renovation grants** can target street-level shopfront renovation only or building facade improvements more broadly. These cover such items as building/shopfront cladding, architectural features, windows and doors, exterior lighting, signage (several cities offer a separate signage grant), weather protection, and exterior accessibility improvements.

**Premises improvement grants** are offered by some of the case study cities in support of landscaping projects, parking lot improvement, new amenities, and (in the case of Fort McMurray) fire-resistant landscaping. Lethbridge, AB and Maple Ridge, BC both offer grants for projects built in accordance with the concept of crime prevention through environmental design (CPTED), aiming to improve safety and discourage crime. Eligible projects include motion-activated lighting, fencing, surveillance camera systems, etc.

**Building interior improvement grants** aim to improve the aging building stock found in many of the surveyed cities, helping to attract businesses to vacant spaces as well as encouraging existing tenants to remain downtown. These grants can cover accessibility improvements (some cities offer a distinct "barrier-free grant"); heating, ventilation, and air conditioning upgrades; plumbing, electrical upgrades, interior configuration and decoration. Windsor, ON offers a grant in this category that targets retail space only, which aims to increase the concentration of retail within the downtown core. A separate grant aims to incent building owners to convert underused or vacant upper-storey spaces into new residential units.

**New development grants** are offered by some cities, providing direct government support for redevelopment of existing buildings, or new development on vacant land. Windsor, ON offers one such program targeting new downtown residential development, providing a grant worth $2,500 per new residential unit (up to a limit of $50,000 per property).

**Mural grants** are offered by many cities often in collaboration with local business associations and arts organizations. These aim to beautify downtown areas and improve the appearance of blank walls, as well as support local artists. Murals and other forms of public art can also draw new visitors downtown. Fort Saskatchewan has had very good success with its recent mural program.

**Activation, events, and collaboration grants** aim to activate public and/or private spaces in downtown areas by providing support for events and initiatives that draw visitors to the city centre and animate underused spaces. Some cities offer festival/event grants that are not specific to the downtown area.

**Patio grants** aim to bring business activity onto streets, making downtown more vibrant. Such grants are offered to owners of street-level downtown businesses and go toward the cost of new patios. Patio grant programs can be well suited for implementation in concert with streetscape improvement projects.

Fort Saskatchewan is considering to revisit this program as the general public would like to see more, however the business uptake is low. This could be a lack of awareness suggesting a simpler, more focused outreach program. City staff have indicated that they would consider possible lease agreement with businesses whereby the city owns and leases small two-person tables and businesses are responsible for storing and locking them up overnight during peak season and city puts them into storage during winter.

**Demolition grants** are offered by some cities to incent private property owners to remove vacant, underutilized, or unmaintained buildings in the downtown core.

Development grants are commonly offered by the case study cities in support of new construction, renovation projects, or both. These take the form of grants toward the cost of construction, or toward other expenses, such as up-sizing of water and wastewater connections.

**Heritage grants** are offered by some cities in support of restoration of historic buildings. These grants can be put toward repair or restoration of original and architecturally significant building elements. Projects of a non-historic nature (including routine maintenance work) are typically ineligible. In addition, eligible buildings must be defined in some way (for example, a grant program could apply to registered heritage buildings only).

**Business development grants** aim to attract new business to downtown areas, support and retain existing local businesses, and help draw new customers downtown. Examples include grants for marketing, special events, and employee training. Kitchener, ON offers a unique "startup landing pad grant" to downtown building owners who renovate their upper-storey spaces and agree to reserve space for startups for a defined period.

### 7.3.2 Tax Incentive Measures

Aside from grants, many of the same types of projects outlined above can be incentivized using tax exemptions, reductions, or refunds, granted for a defined period. In the surveyed cities, property tax exemptions are commonly offered in support of brownfield redevelopment, renovation of heritage buildings, new downtown construction, and building renovation projects.

#### Fee reductions, exemptions, and rebates

Some cities reduce or waive various development-related fees for projects that contribute to downtown revitalization. Examples of charges that are waived, reduced, or rebated include:

- building permit fees
- development charges
- rezoning fees
- demolition permit fees
- service connection fees
- inspection fees
- service infrastructure modeling fees
- charges for land title searches and filings

### 7.3.3 Priority Permit Processing

Some of the case study cities offer expedited processing of applications for new downtown developments, renovation works, and redevelopment. To provide certainty to project proponents, the expedited timelines are clearly defined. This type of incentive may require cooperation and resources from various municipal business units, or even funding for third-party support if existing municipal resources are insufficient to meet demand within required timelines.

### 7.3.4 Business Loan Programs

The City of Lethbridge provides interest-free loans (up to $20,000) to downtown businesses to support a variety of improvement works such as building repairs, renovations, accessibility interventions, and landscaping. The loans can also support the purchase of business equipment and technology. Loan interest is paid for by a municipal committee.

Kitchener, Ontario formerly offered a similar loan program. Staff commented that pursuing loan repayment was burdensome for city administration.

**Land-use policy**

Many cities have undertaken planning exercises focused on their downtown area, creating local area plans and strategies with a greater level of detail regarding density, urban design parameters, heritage and brownfield considerations, and so on. Often, these efforts focus on creating more housing in downtown areas (through up-zoning or other land-use bylaw measures) as well as creating jobs in the local area.

Community benefit density bonusing is offered by some municipalities within downtown areas, or in zones that are exclusively found in downtown areas. Under such arrangements, developers are permitted to build additional floorspace in exchange for prescribed community benefits such as heritage conservation or restoration works, provision of publicly accessible amenity areas, or additional residential floor area.

Cities across North America are increasingly relaxing (or eliminating) parking requirements, which can improve the economic viability of new development especially in city-centre areas with smaller lot sizes and higher land values. Parking reform can also contribute to better urban design and walkability outcomes by helping to create pedestrian-oriented streets with fewer driveways and surface parking lots.

## 7.4 Incentives Implementation

Although this study focuses on the retail demand and efforts to improve downtown areas in particular, some of the available programs examined in case study research were not specific to the core area of their respective city. For example, St. Albert's storefront beautification grant program applies to any "storefront business" within the city. However, most of the measures examined were available exclusively within a defined program area (generally downtown, but sometimes inclusive of downtown-adjacent districts also deemed in need of reinvestment.

Certain grants were further targeted toward a subset of the program area – for example, a particular retail street within a downtown – depending on local needs and conditions. Others apply only to certain properties within the program area, as was the case for many brownfield development incentives, which typically apply to specific brownfield properties that were considered potentially contaminated and therefore in need of environmental remediation.

Some types of grants are inherently targeted toward a particular type of applicant. For example, a facade improvement grant would most likely benefit a property owner, rather than a tenant. A patio grant would attract applications from restaurant owners, not property owners.

A wide range of eligibility conditions were observed, which allow the surveyed cities to exercise a high degree of influence over incentive program outcomes. Many incentives are available only if projects meet a certain investment threshold, thereby encouraging higher levels of investment in the downtown area and (most likely) supporting projects with a greater impact. Most municipalities also define the costs that grants can be applied to – sometimes grant money can be put toward soft costs such as design fees, while in other cases funding is provided only for construction cost. Some cities require that grant beneficiaries adhere to specific urban design guidelines, or that projects create a minimum number of new residential units.

Some incentive programs are funded and/or administered by municipal governments alone. Others are implemented with the involvement of other levels of government, downtown business associations, and non-governmental organizations. Some mural and public art programs involve local arts groups and educational institutions. External involvement may extend in some form to assessing grant applications, project monitoring, or assessment of compliance, thereby helping to relieve the additional burden placed on municipal staff.

Incentive programs may be incorporated into the annual operating budget of a city department, or supported through a dedicated fund whereby the program runs until the fund is exhausted, at which point the program is reassessed. Potential sources of funding include general tax revenues, debt, business license fees, BIA fees, and other levels of government.

Typically, applicants are limited in their ability to receive funding from a grant program on a repeat basis. Normally, a business or property owner is only eligible to receive a particular grant once within a designated time frame (e.g. once every five years). In addition, some cities with multiple-grant incentive programs specify that applicants can only receive one of the grants – they must choose one.

Incentive programs and land-use bylaw reforms have been tailored widely in response to local conditions and the priorities of each community. For example, Windsor's programs aim to support downtown retail; Kitchener (a university city) seeks to create a supportive environment for startup businesses; and Lethbridge's CPTED policy aims to address anti-social behaviour in the downtown area, such as vandalism. Reflecting on local issues and priorities will help the municipality identify the types of incentive measures that may be suitable for Fort Saskatchewan.

## 7.5 Retail Positioning Opportunities

As noted in the Consumer Survey responses, ideas for increasing Downtown draws commonly included:

- More events (e.g. street closures, night market, cultural events);
- Greater variety of shops:
  - Sit down restaurants, coffee shops/ cafes, breweries and butchers;
  - More shops and services for kids, youth and families, particularly recreation and entertainment;
  - Bookstores, hobby and music shops;
- Indoor and outdoor recreation opportunities year-round for all, especially for families.

Missing specific retail, services or restaurants was selected by the majority (71.7%) of respondents as a primary reason they don't visit Downtown. Missing specific merchandise was the next most common reason selected by 46.9% of residents.

**Table 7-1** responds to the consumer survey feedback and identifies a roster of potential store types that fit the market profile of Downtown Fort Saskatchewan indicating the typical store size and whom the target audience might best serve.

One method to attract businesses is to work with the existing leaseholders or property owners to consider redemising larger spaces into temporary smaller micro retail units or pop ups that can incubate local concepts while generating cash flow for the landlord(s).

Alternatively and for many businesses the likelihood of attracting a corporate run retail store/concept is limited, but the **franchise** or licensee model is a distinct possibility. Through the city, perhaps a local "franchisee" event could be held with local banks and others to assess the opportunity to have a stable of potential franchisees on hand. This approach would give great confidence to some brands for whom there is interest in understanding the depth of the franchise potential.

Additionally, there are opportunities to cultivate **local independent store types** that would be equipped to fit within the downtown as either pop-up incubators or full-time tenants. Smaller communities and those with essential downtowns or main streets, must continue to cultivate an environment in which local independent stores can succeed. Independent stores contribute to community vitality with unique offerings and experiences, and often have more flexibility to adapt to changing environments compared with larger businesses. Additionally, a higher portion of money spent in local small businesses stays in the community compared with non-local and larger businesses (**Figure 7-1**).

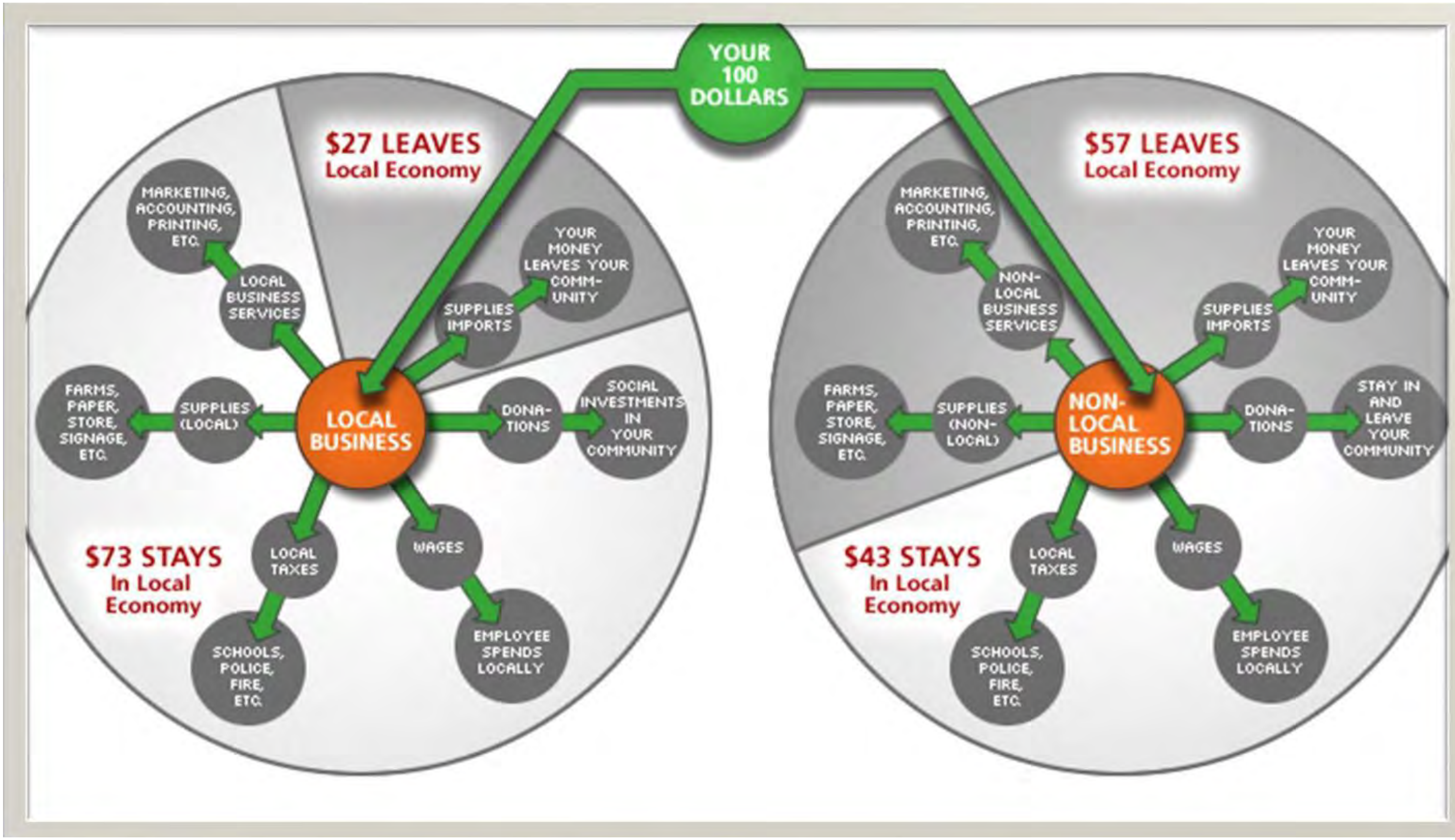
Table 7-1. Potential Merchandise Category Store Type Opportunities for Downtown Fort Saskatchewan

| Business Concept/Type | Retail Category | Local or Brand | Approx Size Range (min sf) | Approx Size Range (max sf) | Target Audience Residents, Visitors, Students, Employees |
|---|---|---|---|---|---|
| Axe Thowing Bar | Arts & Entertainment | Local | 2,000 | 5,000 | Residents & Visitors |
| Indoor Climbing Centre | Arts & Entertainment | Local | 2,000 | 6,000 | Residents & Students |
| Hiking & Trail Boutique | Sporting Goods & Outdoor Recreation | Local | 1,000 | 2,000 | Residents & Visitors |
| Headwear, Gloves & Socks | Fashion & Footwear | Local | 500 | 750 | Residents & Workforce |
| Ethnic Fare - Pho/Noodle House | Full Service F&B | Local | 1,250 | 2,000 | Residents, Visitors & Workforce |
| Ethnic Fare - Korean | Full Service F&B | Local | 1,250 | 2,000 | Residents, Visitors & Workforce |
| Ethnic Fare - Filipino | Full Service F&B | Local | 1,250 | 2,000 | Residents, Visitors & Workforce |
| Ethnic Fare - Sushi | Full Service F&B | Local | 1,250 | 2,000 | Residents, Visitors & Workforce |
| Ethnic Fare - Tapas Lounge | Full Service F&B | Local | 1,000 | 1,500 | Residents, Visitors & Workforce |
| Wine & Whiskey Bar | Full Service F&B | Local | 1,250 | 1,750 | Residents, Visitors & Workforce |
| 50s Diner (Burgers & Shakes) | Full Service F&B | Local | 1,000 | 1,500 | Residents, Visitors & Workforce |
| Creperie & Breakfasts | Full Service F&B | Local | 1,000 | 2,500 | Residents & Visitors |
| Urban Cidery / Cider House | Full Service F&B | Local | 1,250 | 2,500 | Residents & Visitors |
| Cakery & Teahouse | Grocery / Quick Service F&B | Local | 750 | 1,250 | Residents |
| Cheeses, Olive Oils & Vinegars | Grocery & Specialty Foods | Local | 500 | 1,000 | Residents & Visitors |
| Candy Shop | Grocery & Specialty Foods | Local | 500 | 750 | Residents & Students |
| Community Food Co-op Deli & Grocer | Grocery & Specialty Foods | Local | 2,000 | 4,000 | Residents & Visitors |
| Beef Jerky Shop / Butcher | Grocery & Specialty Foods | Local | 750 | 1,500 | Residents & Visitors |
| Salad & Juice Bar | Limited Service F&B | Local | 500 | 750 | Residents, Visitors & Workforce |
| Grilled Cheese Counter | Limited Service F&B | Local | 500 | 750 | Residents, Visitors & Workforce |
| Food Trucks (quasi-permanent) | Limited Service F&B | Local | 500 | 750 | Residents, Visitors & Workforce |
| Chocolate & Fondue Coffee Bar | Limited Service F&B | Local | 750 | 1,250 | Residents & Visitors |
| Community Kitchen | Personal Service | Local | 1,500 | 2,500 | Residents |
| Co-working Office & Café | Professional Services | Local | 2,000 | 5,000 | Residents |
| Pop-Up Shops (home-based incubator) | Specialty Retail | Local | 250 | 500 | Residents |

Figure 7-1. Supporting Local Businesses Builds Communities Diagram

A study by Synergy Credit Union in the City of Lloydminster (Alberta), found that for every $100 spent in local businesses, $73 (73%) stays in the community to support local business services and supplies, and contributes to local taxes, wages and donations. In contrast, $43 (43%) of every $100 spent at a non-local business stays in the community and contributes to local taxes, wages and donations. While exact dollar figures vary by community, the trend and pattern is consistent in studies like this across North America whereby a higher portion of retail dollars invested in locally owned and operated businesses tend to stay in the community compared to non-local businesses.

*(Source: Synergy Credit Union Economic Development Breakfast Presentation, May 2022)*



# Appendix A: Detailed Inventory

| NAICS 2-DIGIT | NAICS GENERAL CODE | NAICS 3-DIGIT | NAICS DETAILED CODE | RETAIL MERCHANDISE or BUSINESS CATEGORY | BROAD MARKET CATEGORY | TENANT NAME | UNIT # | ADDRESS | NODE | TOTAL FLOOR AREA (SF) |
|---|---|---|---|---|---|---|---|---|---|---|
| 44 | Retail Trade | 445 | Food and beverage retailers | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Liquor Shop | | 10327 99 Avenue | 99th Ave Corridor | 1,086 |
| 44 | Retail Trade | 445 | Food and beverage retailers | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Ace Liquor | | 10451 99 Avenue | 99th Ave Corridor | 5,577 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Discount Vape & Smoke | | 9968 99 Avenue | 99th Ave Corridor | 1,620 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | ALCOHOL, TOBACCO & CANNABIS | RETAIL | P Squared Vapes | | 10404 99 Avenue | 99th Ave Corridor | 2,188 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Fort Vape Shop | | 10309 99 Avenue | 99th Ave Corridor | 1,581 |
| 51 | Information & Cultural Industries | 512 | Motion picture and sound recording industries | ARTS & ENTERTAINMENT | RETAIL | Fort Cinema | | 9922 100 Street | 99th Ave Corridor | 9,349 |
| 44 | Retail Trade | 441 | Motor vehicle and parts dealers | AUTO PARTS & ACCESSORIES | | OK Tire | | 9902 103 Street | 99th Ave Corridor | 2,324 |
| 44 | Retail Trade | 441 | Motor vehicle and parts dealers | AUTO PARTS & ACCESSORIES | | Trail Tire | | 10308 99 Avenue | 99th Ave Corridor | 6,030 |
| 44 | Retail Trade | 441 | Motor vehicle and parts dealers | AUTO PARTS & ACCESSORIES | | NAPA Auto Parts | | 10404 99 Avenue | 99th Ave Corridor | 17,372 |
| 81 | Other services (except public administration) | 811 | Repair and maintenance | AUTO SERVICE | | 7-Eleven Car Wash | | 9817 101 Street | 99th Ave Corridor | 1,173 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Legendary Barbershop | | 9903 102 Street | 99th Ave Corridor | 500 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Friendly Nails | | 9905 102 Street | 99th Ave Corridor | 2,290 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Nexus Therapeutics | #162 | 10404 99 Avenue | 99th Ave Corridor | 2,240 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Doodle Me Pretty | #158 | 10404 99 Avenue | 99th Ave Corridor | 1,430 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Magic Tattoo Factory | #120 | 10404 99 Avenue | 99th Ave Corridor | 2,154 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Envy Lashes | A | 10302 99 Avenue | 99th Ave Corridor | 1,187 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Sunrae Massage and Wellness | | 10304 99 Avenue | 99th Ave Corridor | 1,279 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Frankies Barbershop | | 10321 99 Avenue | 99th Ave Corridor | 1,024 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Hair Mantra | | 9827 104 Street | 99th Ave Corridor | 1,158 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Skin Effect Laser and Medical Aesthetics | #701 | 10441 99 Avenue | 99th Ave Corridor | 1,622 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Renew Hair and Esthetics | #309 | 10451 99 Avenue | 99th Ave Corridor | 1,887 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Fake & Bake Suntan Studios | | 9824 102 Street | 99th Ave Corridor | 1,241 |
| 81 | Other services (except public administration) | 812 | Personal & laundry services | BEAUTY & PERSONAL CARE | RETAIL | La Perla Hair Studio Inc. | | 10111 99 Avenue | 99th Ave Corridor | 1,099 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Pear Beauty | A | 10102 98 Avenue | 99th Ave Corridor | 960 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Infinite Balance Massage | C1 | 10102 98 Avenue | 99th Ave Corridor | 1,322 |
| 61 | Educational Services | 611 | Educational services | COMMUNITY SERVICE | | Robin Hood Association - Fort Saskatchewan Learning Centre | | 9924 99 Avenue | 99th Ave Corridor | 2,867 |
| 61 | Educational Services | 611 | Educational services | COMMUNITY SERVICE | | Skill-Bit Employment Training | | 9821 108 Street | 99th Ave Corridor | 3,729 |
| 61 | Educational Services | 611 | Educational services | FITNESS & LEISURE | RETAIL | The Space: Yoga, Wellness, Meditation | #307 | 10451 99 Avenue | 99th Ave Corridor | 2,021 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Union Hall Pub and Grill | | 10208 99 Avenue | 99th Ave Corridor | 3,184 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | The Atlantic Kitchen | | 9904 102 Street | 99th Ave Corridor | 3,210 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Hanabi | | 10404 99 Avenue | 99th Ave Corridor | 2,342 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Sky Hy Pizza & Donair | #152 | 10404 99 Avenue | 99th Ave Corridor | 1,466 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Pots Bar & Grill | | 9821 108 Street | 99th Ave Corridor | 4,628 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Perry's 2 For 1 Pizza & Pasta | | 9805 108 Street | 99th Ave Corridor | 1,204 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Cosmic Pizza & Donair and Crispy's Chicken | #707 | 10441 99 Avenue | 99th Ave Corridor | 1,546 |
| | | | | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | AUTO PARTS & ACCESSORIES | | Dollarama MD Category | | | 99th Ave Corridor | 491 |
| | | | | AUTO/RV/MOTORSPORTS | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | BOOKS, MEDIA & VIDEO GAMES | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 491 |
| | | | | FASHION & FOOTWEAR | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 491 |
| | | | | ARTS & ENTERTAINMENT | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | FULL SERVICE F&B | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | GROCERY, CONVENIENCE & SPECIALTY FOODS | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 2,455 |
| | | | | BEAUTY & PERSONAL CARE | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 982 |
| | | | | HOME ELECTRONICS & APPLIANCES | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | HOME FURNISHINGS & DÉCOR | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | HOME IMPROVEMENT & GARDENING | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 491 |
| | | | | JEWELRY | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 491 |
| | | | | LIMITED SERVICE F&B | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | PERSONAL SERVICE | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | PHARMACY | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | SPECIALTY RETAIL | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 3,437 |
| | | | | SPORTING GOODS & OUTDOOR RECREATION | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 491 |
| | | | | TOYS & HOBBIES | RETAIL | Dollarama MD Category | | | 99th Ave Corridor | 0 |
| | | | | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | AUTO PARTS & ACCESSORIES | | Dollar Tree MD Category | | | 99th Ave Corridor | 676 |
| | | | | AUTO/RV/MOTORSPORTS | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | BOOKS, MEDIA & VIDEO GAMES | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 676 |
| | | | | FASHION & FOOTWEAR | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 901 |
| | | | | ARTS & ENTERTAINMENT | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | FULL SERVICE F&B | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | GROCERY, CONVENIENCE & SPECIALTY FOODS | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 6,758 |
| | | | | BEAUTY & PERSONAL CARE | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 2,253 |
| | | | | HOME ELECTRONICS & APPLIANCES | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 225 |
| | | | | HOME FURNISHINGS & DÉCOR | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | HOME IMPROVEMENT & GARDENING | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 1,126 |
| | | | | JEWELRY | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 451 |
| | | | | LIMITED SERVICE F&B | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | PERSONAL SERVICE | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | PHARMACY | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| | | | | SPECIALTY RETAIL | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 8,334 |
| | | | | SPORTING GOODS & OUTDOOR RECREATION | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 1,126 |
| | | | | TOYS & HOBBIES | RETAIL | Dollar Tree MD Category | | | 99th Ave Corridor | 0 |
| 44 | Retail Trade | 445 | Food and beverage retailers | GROCERY, CONVENIENCE & SPECIALTY FOODS | RETAIL | Co-op Food Store | | 10004 99 Avenue | 99th Ave Corridor | 43,846 |
| 44 | Retail Trade | 445 | Food and beverage retailers | GROCERY, CONVENIENCE & SPECIALTY FOODS | RETAIL | 7-Eleven | | 10303 99 Avenue | 99th Ave Corridor | 1,690 |
| 45 | Retail Trade | 457 | Gasoline stations and fuel vendors | GROCERY, CONVENIENCE & SPECIALTY FOODS | RETAIL | ESSO | | 9817 101 Street | 99th Ave Corridor | 2,744 |
| 45 | Retail Trade | 457 | Gasoline stations and fuel vendors | GROCERY, CONVENIENCE & SPECIALTY FOODS | RETAIL | ESSO Smart Shop | | 9817 101 Street | 99th Ave Corridor | 1,497 |
| 23 | Construction Sector | 238 | Specialty trade contractors | HOME FURNISHINGS & DÉCOR | RETAIL | Custom Blinds by Design | #100 | 9940 99 Avenue | 99th Ave Corridor | 3,127 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | LIMITED SERVICE F&B | RETAIL | Dairy Queen | | 9910 99 Avenue | 99th Ave Corridor | 2,636 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | LIMITED SERVICE F&B | RETAIL | Pizza 73 | | 10002 99 Avenue | 99th Ave Corridor | 1,802 |

| NAICS 2-DIGIT | NAICS GENERAL CODE | NAICS 3-DIGIT | NAICS DETAILED CODE | RETAIL MERCHANDISE or BUSINESS CATEGORY | BROAD MARKET CATEGORY | TENANT NAME | UNIT # | ADDRESS | NODE | TOTAL FLOOR AREA (SF) |
|---|---|---|---|---|---|---|---|---|---|---|
| 72 | Accommodation & food services | 722 | Food services and drinking places | LIMITED SERVICE F&B | RETAIL | The Venue by Ken's Catering | #511 | 10470 98 Avenue | 99th Ave Corridor | 1,976 |
| 61 | Educational Services | 612 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Fort Orthodontics | | 9837 104 Street | 99th Ave Corridor | 1,891 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Paraclete Psychological and Support Services | | 9803 102 Street | 99th Ave Corridor | 1,769 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Doderai Dental Group | | 9918 99 Avenue | 99th Ave Corridor | 5,849 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Greenwood Medical Clinic | | 9804 104 Street | 99th Ave Corridor | 1,206 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Life in Colour Psychology | A | 9804 104 Street | 99th Ave Corridor | 1,557 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Vivid Vision | #701 | 10441 99 Avenue | 99th Ave Corridor | 1,656 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | MEDICAL & WELLNESS SERVICE | | Judy's Safety Co. | #409 | 10410 98 Avenue | 99th Ave Corridor | 4,697 |
| 56 | Administrative and support, waste management and remediation services | 561 | Administrative and support services | PERSONAL SERVICE | RETAIL | Fort Saskatchewan Bottle Depot | | 9822 103 Street | 99th Ave Corridor | 4,962 |
| 56 | Administrative and support, waste management and remediation services | 561 | Administrative and support services | PERSONAL SERVICE | RETAIL | Four Seasons Furnace Cleaning & Services? | | 99 Avenue - Needs confirmatior | 99th Ave Corridor | 1,301 |
| 61 | Educational Services | 611 | Educational services | PERSONAL SERVICE | RETAIL | A Fairytale Beginning Preschool | #515 | 10470 98 Avenue | 99th Ave Corridor | 1,773 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | Little Wonder Child Development Centre | | 9811 108 Street | 99th Ave Corridor | 5,620 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | Fort Stars | | 9818 102 Street | 99th Ave Corridor | 2,925 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | Lamoureux Support Services | #501 | 10470 98 Avenue | 99th Ave Corridor | 7,455 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | The Treehouse Daycare & OSC | #513 | 10470 98 Avenue | 99th Ave Corridor | 1,792 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | The Treehouse Daycare & OSC | #513 | 10470 98 Avenue | 99th Ave Corridor | 4,835 |
| 31 | Manufacturing | 313 | Textile mills | PERSONAL SERVICE | RETAIL | Enhance It Embroidery | | 10404 98 Avenue | 99th Ave Corridor | 1,391 |
| 81 | Other services (except public administration) | 811 | Repair and maintenance | PERSONAL SERVICE | RETAIL | Appliance Repair Expert | | 9807 101 Street | 99th Ave Corridor | 3,234 |
| 81 | Other services (except public administration) | 811 | Repair and maintenance | PERSONAL SERVICE | RETAIL | Cell@Fix | A | 10002 99 Avenue | 99th Ave Corridor | 1,740 |
| 45 | Retail Trade | 456 | Health and personal care retailers | PHARMACY | RETAIL | The Medicine Shoppe Pharmacy | #102 | 9940 99 Avenue | 99th Ave Corridor | 2,890 |
| 45 | Retail Trade | 456 | Health and personal care retailers | PHARMACY | RETAIL | Fort Station Pharmacy | #629 | 10490 98 Avenue | 99th Ave Corridor | 5,530 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related activities | PROFESSIONAL & FINANCIAL SERVICE | | CIBC | | 9903 101 Street | 99th Ave Corridor | 5,278 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related activities | PROFESSIONAL & FINANCIAL SERVICE | | TD Canada Trust | | 10006 99 Avenue | 99th Ave Corridor | 5,365 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related activities | PROFESSIONAL & FINANCIAL SERVICE | | ATB Financial | | 9964 99 Avenue | 99th Ave Corridor | 4,769 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related services | PROFESSIONAL & FINANCIAL SERVICE | | Servus Credit Union | | 9839 104 Street | 99th Ave Corridor | 3,646 |
| 52 | Finance & Insurance | 523 | Securities, commodity contracts, and other financial investment and related activitie | PROFESSIONAL & FINANCIAL SERVICE | | Alberta's Industrial Heartland Association | #300 | 9940 99 Avenue | 99th Ave Corridor | 2,828 |
| 52 | Finance & Insurance | 524 | Insurance carriers and related activities | PROFESSIONAL & FINANCIAL SERVICE | | Smith Insurance Service | | 9902 102 Street | 99th Ave Corridor | 3,813 |
| 52 | Finance & Insurance | 524 | Insurance carriers and related activities | PROFESSIONAL & FINANCIAL SERVICE | | Drayden Insurance Ltd. | | 9907 102 Street | 99th Ave Corridor | 3,042 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | EagleRock Computer | | 9811 101 Street | 99th Ave Corridor | 3,915 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Alberta Tax Service | | 9809 101 Street | 99th Ave Corridor | 2,030 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Karis Law Office | | 9805 101 Street | 99th Ave Corridor | 1,123 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | City Law Offices | | 9812 102 Street | 99th Ave Corridor | 1,651 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Hotke Paul Professional Corporation | | 9807 102 Street | 99th Ave Corridor | 3,480 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Givens LLP Chartered Professional Accountants | | 9928 99 Avenue | 99th Ave Corridor | 2,946 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Time for Taxes | #148 | 10404 99 Avenue | 99th Ave Corridor | 1,822 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Wild Rose Animal Clinic Ltd. | | 10315 99 Avenue | 99th Ave Corridor | 1,164 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Metrix Group | C | 9804 104 Street | 99th Ave Corridor | 1,083 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific, and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Liberty Tax | | 10199 99 Avenue | 99th Ave Corridor | 1,155 |
| 53 | Real Estate & rental & leasing | 531 | Real estate | PROFESSIONAL & FINANCIAL SERVICE | | Royal LePage | #317 | 10451 99 Avenue | 99th Ave Corridor | 3,137 |
| 53 | Real Estate & rental & leasing | 531 | Real estate | PROFESSIONAL & FINANCIAL SERVICE | | Oakwood Management Ltd. | A | 10266 99 Avenue | 99th Ave Corridor | 595 |
| 44 | Retail Trade | 445 | Food and beverage retailers | SPECIALTY RETAIL | RETAIL | The Cotton Candy Shoppe | #116 | 10404 99 Avenue | 99th Ave Corridor | 4,666 |
| 44 | Retail Trade | 445 | Food and beverage retailers | SPECIALTY RETAIL | RETAIL | Caught in the Cookie Jar | | 9825 104 Street | 99th Ave Corridor | 1,287 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | SPECIALTY RETAIL | RETAIL | Fair Winds Trade | | 9806 104 Street | 99th Ave Corridor | 1,509 |
| | | | | **VACANT** | | Formerly Country Chic Inc | | 9831 104 Street | 99th Ave Corridor | 1,648 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10102 98 Avenue | 99th Ave Corridor | 1,071 |
| | VACANT | | | **VACANT** | | Vacant bldg | B | 10002 99 Avenue | 99th Ave Corridor | 2,826 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9833 104 Street | 99th Ave Corridor | 1,205 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9801 108 Street | 99th Ave Corridor | 2,324 |
| | VACANT | | | **VACANT** | | Vacant bldg | #705 | 10441 99 Avenue | 99th Ave Corridor | 1,646 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10451 99 Avenue | 99th Ave Corridor | 1,532 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10451 99 Avenue? | 99th Ave Corridor | 1,719 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10451 99 Avenue | 99th Ave Corridor | 2,379 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10470 98 Avenue | 99th Ave Corridor | 1,609 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10490 98 Avenue | 99th Ave Corridor | 1,659 |
| | VACANT | | | **VACANT** | | Vacant bldg | #611 | 10471 99 Avenue | 99th Ave Corridor | 2,666 |
| | VACANT | | | **VACANT** | | Vacant bldg | #601 | 10471 99 Avenue | 99th Ave Corridor | 6,925 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10410 98 Avenue | 99th Ave Corridor | 29,161 |
| | VACANT | | | **VACANT** | | Vacant bldg | 401 | 10410 98 Avenue | 99th Ave Corridor | 9,047 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 10206 99 Avenue | 99th Ave Corridor | 522 |
| | | | | | | Vacant lot | | 9821 102 Street | 99th Ave Corridor | 0 |
| | | | | ACCOMODATION | | **Brant Hotel** | | **10001 103 Street** | **Downtown Core** | **7,481** |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | ALCOHOL, TOBACCO & CANNABIS | RETAIL | Canna Cabana | A | 10310 100 Avenue | Downtown Core | 1,975 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Flo's Beauty Salon | | 10208 100 Avenue | Downtown Core | 1,210 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Apropos Therapy Center | | 9911 101 Street | Downtown Core | 1,276 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Urban Studio | | 10203 100 Avenue | Downtown Core | 1,609 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Fort Barbers | | 10204 100 Avenue | Downtown Core | 1,084 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Shawn's Barbershop | | 10401 100 Avenue | Downtown Core | 2,244 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Ace of Fades | | 10303 100 Avenue | Downtown Core | 848 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Welcome Nails & Spa | | 10303 100 Avenue | Downtown Core | 914 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Hairdo Hair Salon | | 9930 103 Street | Downtown Core | 1,088 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | BEAUTY & PERSONAL CARE | RETAIL | Spa Experience by Candice | D | 10309 100 Avenue | Downtown Core | 1,344 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | BOOKS, MEDIA & VIDEO GAMES | RETAIL | Ravenous EFX | | 9910 102 Street | Downtown Core | 630 |
| 49 | Transportation and warehousing | 491 | Postal service | COMMUNITY SERVICE | | Canada Post | | 10004 103 Street | Downtown Core | 4,942 |
| 53 | Real Estate & rental & leasing | 532 | Rental and leasing services | FASHION & FOOTWEAR | RETAIL | Derk's Formal Rentals | | 10103 100 Avenue | Downtown Core | 959 |
| 45 | Retail Trade | 458 | Clothing, clothing accessories, shoes, jewelry, luggage and leather goods retailers | FASHION & FOOTWEAR | RETAIL | Twice But Nice | | 9924 102 Street | Downtown Core | 4,835 |
| 45 | Retail Trade | 458 | Clothing, clothing accessories, jewelry, luggage and leather goods retailers | FASHION & FOOTWEAR | RETAIL | Share & Care Thrift | B | 9906 102 Street | Downtown Core | 1,360 |
| 71 | Arts, entertainment & recreation | 713 | Amusement, gambling and recreation industries | FITNESS & LEISURE | RETAIL | Pioneer House Club 50 | | 10102 100 Avenue | Downtown Core | 11,424 |

| NAICS 2-DIGIT | NAICS GENERAL CODE | NAICS 3-DIGIT | NAICS DETAILED CODE | RETAIL MERCHANDISE or BUSINESS CATEGORY | BROAD MARKET CATEGORY | TENANT NAME | UNIT # | ADDRESS | NODE | TOTAL FLOOR AREA (SF) |
|---|---|---|---|---|---|---|---|---|---|---|
| 61 | Educational Services | 611 | Educational services | FITNESS & LEISURE | RETAIL | Dance Moves III | | 9917 102 Street | Downtown Core | 6,212 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | The Bear's Den | | 9923 102 Street | Downtown Core | 8,044 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | House of Hong | | 10207 100 Avenue | Downtown Core | 3,167 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | City Donair & Kebob | | 10203 100 Avenue | Downtown Core | 1,616 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Eggcellent P'Eats | | 9908 103 Street | Downtown Core | 3,015 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | Spice Hut Indian Cuisine | | 9907 103 Street | Downtown Core | 5,344 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | The Club House | | 10209 100 Avenue | Downtown Core | 2,523 |
| 72 | Accommodation & food services | 722 | Food services and drinking places | FULL SERVICE F&B | RETAIL | VN Express Ltd. | | 10213 100 Avenue | Downtown Core | 1,751 |
| 44 | Retail Trade | 444 | Building material and garden equipment and supplies dealers | HOME IMPROVEMENT & GARDENING | RETAIL | Crystal Glass Canada | | 9918 103 Street | Downtown Core | 3,269 |
| 45 | Retail Trade | 458 | Clothing, clothing accessories, shoes, jewelry, luggage and leather goods retailers | JEWELRY | RETAIL | Gold & Diamond Boutique | B | 10308 100 Avenue | Downtown Core | 1,565 |
| 45 | Retail Trade | 458 | Clothing, clothing accessories, shoes, jewelry, luggage and leather goods retailers | JEWELRY | RETAIL | Legacy Jewellers | | 10307 100 Avenue | Downtown Core | 2,024 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Pinder Chiropractic | | 10101 100 Avenue | Downtown Core | 1,884 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Balanced Chiropractic | | 10511 100 Avenue | Downtown Core | 1,138 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Dental Clinic: Dr. Tarnawsky Andrew | C | 9906 102 Street | Downtown Core | 1,821 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Modern Denture Care Fort Sastatchewan Clinic | A | 10204 100 Avenue | Downtown Core | 1,088 |
| 62 | Health Care & Social Assistance | 621 | Ambulatory health care services | MEDICAL & WELLNESS SERVICE | | Fort Saskatchewan Chiropractic Clinic | | 10308 100 Avenue | Downtown Core | 1,639 |
| 62 | Health Care & Social Assistance | 623 | Nursing and residential care facilities | MEDICAL & WELLNESS SERVICE | | Rivercrest Nursing Home | | 10104 101 Avenue | Downtown Core | 32,952 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | Wee Care Family Day Homes | | 9904 103 Street | Downtown Core | 2,415 |
| 62 | Health Care & Social Assistance | 624 | Social assistance | PERSONAL SERVICE | RETAIL | The Bridge Wellness Hub for Youth | #2 | 10307 100 Avenue | Downtown Core | 1,108 |
| 81 | Other services (except public administration) | 811 | Repair and maintenance | PERSONAL SERVICE | RETAIL | Fort Shoe Repair | | 9910 102 Street | Downtown Core | 595 |
| 81 | Other services (except public administration) | 811 | Repair and maintenance | PERSONAL SERVICE | RETAIL | Fort Gasland | | 10402 100 Avenue | Downtown Core | 2,404 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | PERSONAL SERVICE | RETAIL | Serenity Funeral Service | | 9914 103 Street | Downtown Core | 2,763 |
| 81 | Other services (except public administration) | 812 | Personal and laundry services | PERSONAL SERVICE | RETAIL | Fort Cleaners & Laundry Ltd. | | 10406 100 Avenue | Downtown Core | 3,143 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related activiteis | PROFESSIONAL & FINANCIAL SERVICE | | RBC Royal Bank | | 9916 102 Street | Downtown Core | 4,118 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related activities | PROFESSIONAL & FINANCIAL SERVICE | | Spark the Energy Credit Union Ltd. | 104 | 9923 103 Street | Downtown Core | 588 |
| 52 | Finance & Insurance | 522 | Credit intermediation and related activities | PROFESSIONAL & FINANCIAL SERVICE | | Envolve Mortgage Group | 102 | 9923 103 Street | Downtown Core | 631 |
| 52 | Finance & Insurance | 523 | Securities, commodity contracts, and other financial investment and related activitie | PROFESSIONAL & FINANCIAL SERVICE | | Co-operators - M Friel Agencies Inc. | | 10214 100 Avenue | Downtown Core | 2,969 |
| 52 | Finance & Insurance | 523 | Securities, commodity contracts, and other financial investment and related activitie | PROFESSIONAL & FINANCIAL SERVICE | | Kjenner Financial Services Inc. | B | 9915 103 Street | Downtown Core | 1,122 |
| 32 | Manufacturing | 323 | Printing and related support activities | PROFESSIONAL & FINANCIAL SERVICE | | Dependable Printers | | 10303 100 Avenue | Downtown Core | 980 |
| 81 | Other services (except public administration) | 813 | Religious, grant-making, civic, and professional and similar organizations | PROFESSIONAL & FINANCIAL SERVICE | | Fort Saskatchewan Chamber of Commerce | 101 | 9923 103 Street | Downtown Core | 639 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | KV & Associates | | 9913 103 Street | Downtown Core | 3,429 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Voshell Architecture and Design Inc. | | 9906 104 Street | Downtown Core | 3,912 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Wilson Law & Dispute Resolution | | 10509 100 Avenue | Downtown Core | 2,563 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and techncial services | PROFESSIONAL & FINANCIAL SERVICE | | Fort Saskatchewan Veterinary | | 10408 100 Avenue | Downtown Core | 3,756 |
| 54 | Professional, scientific and technical services | 541 | Professional, scientific and technical services | PROFESSIONAL & FINANCIAL SERVICE | | Akashic Incorporated | C | 10309 100 Avenue | Downtown Core | 1,304 |
| 53 | Real Estate & rental & leasing | 531 | Real estate | PROFESSIONAL & FINANCIAL SERVICE | | REMAX | | 9909 103 Street | Downtown Core | 2,099 |
| 44 | Retail Trade | 445 | Food and beverage retailers | SPECIALTY RETAIL | RETAIL | Sweet K&A Bakery | B | 10310 100 Avenue | Downtown Core | 1,987 |
| 44 | Retail Trade | 449 | Furniture, home furnishings, electronics and applicances retailers | SPECIALTY RETAIL | RETAIL | Spotlight Gallery & Custom Framing | B | 10309 100 Avenue | Downtown Core | 546 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | SPECIALTY RETAIL | RETAIL | The Blu Poppie | | 10206 100 Avenue | Downtown Core | 938 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | SPECIALTY RETAIL | RETAIL | Dreamcatchers Gift & Art Gallery | | 10210 100 Avenue | Downtown Core | 989 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | SPECIALTY RETAIL | RETAIL | Daisy a Day | A | 9915 103 Street | Downtown Core | 1,157 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | SPECIALTY RETAIL | RETAIL | Victorian Hen House | B | 10303 100 Avenue | Downtown Core | 1,496 |
| 44 | Retail Trade | 445 | Food and beverage retailers | SPECIALTY RETAIL | RETAIL | Northern Lights | A | 10202 100 Avenue | Downtown Core | 1,934 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | TOYS & HOBBIES | RETAIL | Kountry Knits & Sewing Center | | 10103 100 Avenue | Downtown Core | 958 |
| 45 | Retail Trade | 459 | Sporting goods, hobby, musical instrument, book, and miscellaneous retailers | TOYS & HOBBIES | RETAIL | The Fort Gaming and Collectibles | | 10303 100 Avenue | Downtown Core | 1,401 |
| | Arts, entertainment & recreation | | | **VACANT** | | Vacant - Former Fort Lanes Bowling and Virtual Golf Centre | | 9936 102 Street | Downtown Core | 8,051 |
| | VACANT | | | **VACANT** | | Vacant (Former Bread Haus) | | 10201 100 Avenue | Downtown Core | 2,020 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9925 104 Street | Downtown Core | 912 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9906 102 Street? | Downtown Core | 1,675 |
| | VACANT | | | **VACANT** | | Vacant bldg | B | 10202 100 Avenue | Downtown Core | 2,543 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9918 102 Street | Downtown Core | 2,958 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9925 104 Street | Downtown Core | 1,466 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9938 103 Street | Downtown Core | 833 |
| | VACANT | | | **VACANT** | | Vacant bldg | | 9934 103 Street | Downtown Core | 880 |
| | | | | | | UNDER CONSTRUCTION | | | Downtown Core | 8,655 |
| | | | | | | Vacant lot | | 10301 100 Avenue | Downtown Core | 0 |
| | | | | | | Vacant lot | | 9928 102 Street | Downtown Core | 0 |
| | | | | | | Vacant lot | | 9932 102 Street | Downtown Core | 0 |
| 45 | Retail Trade | 455 | General merchandise retailers | General Merchandise | | Dollarama | | 9970 99 Avenue | | 9,819 |
| 45 | Retail Trade | 455 | General merchandise retailers | General Merchandise | | Dollar Tree | | 10404 99 Avenue | | 22,525 |

# Appendix B: Survey Data

## Survey Questions

### City of Fort Sask Downtown Gap Analysis Community Survey 2024

Thank you for your interest in this survey about the City of Fort Saskatchewan, Alberta. This survey takes less than 5 minutes to complete and is open until June 24th 2024. Your feedback is crucial for informing the City's Downtown Development Strategy and identifying desired shops and services. Survey results will be summarized in the final report.

**Where do you live?**

- Downtown Fort Sask
- Elsewhere in Fort Sask
- Outside Fort Sask

**What are your primary reasons for visiting or using shops & services in Downtown Fort Sask?**

a) I live in the area
b) I work or own a business in the area
c) I visit the area for recreation/leisure
d) I attend events in the Downtown
e) I go there for a specific retailer/business

Other

**How often do you visit Downtown?**

- a) Daily
- b) Weekly
- c) Monthly
- d) Rarely
- e) Never

**How long do you typically stay Downtown on a visit?**

- a) Less than 30 min
- b) 30 min to 1 hour
- c) 1-2 hours
- d) More than 2 hours

**What are your primary reasons for not using shops and services in Downtown Fort Sask, if any?**

a) Missing specific merchandise

b) Missing specific retailer, services or restaurants

c) Hours of operation

d) Parking

e) Cleanliness

f) Cost of goods or services

g) Safety

h) N/A

Other

**What are some types of shops or services you would use more often if they were available Downtown?**

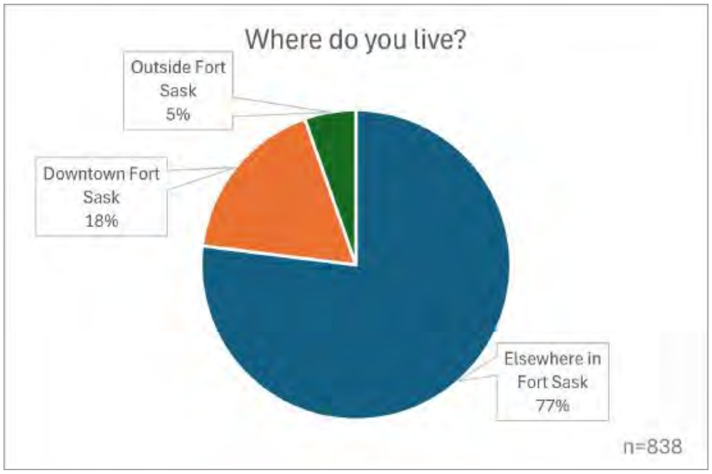
Grocery, Pharmacy & Alcohol
Personal Care & Services
Fashion & Accessories
Home Improvement & Decor
Home & Personal Electronics
Sporting Goods, Books & Hobbies
Fitness & Entertainment
Sit Down Restaurants & Pubs
Quick Service Restaurants

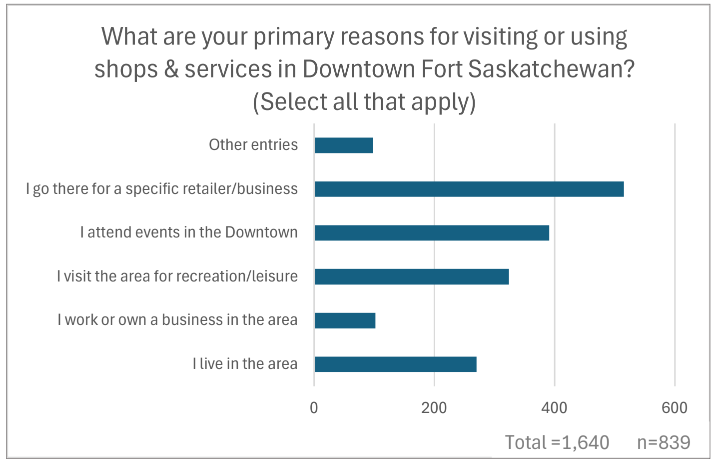
Other

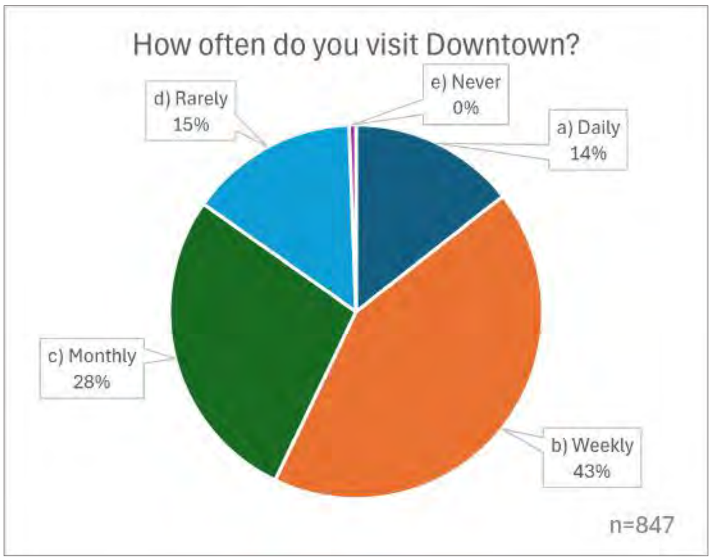
**What's your favourite place to visit in Downtown Fort Sask?**

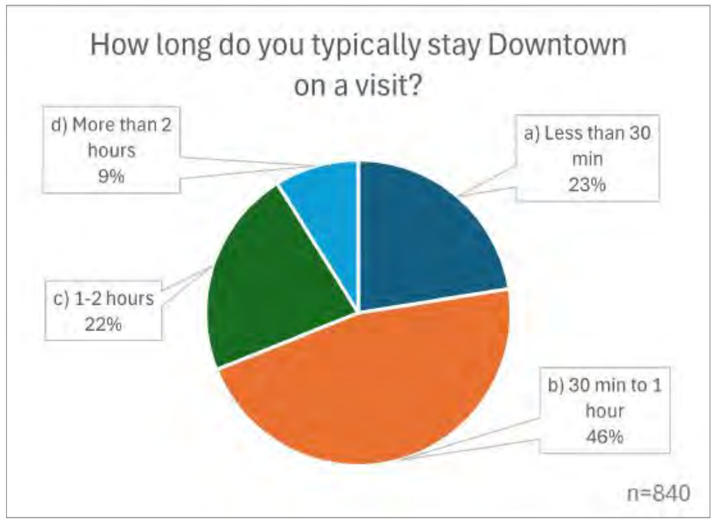
**Do you have any other comments about Downtown Fort Sask?**

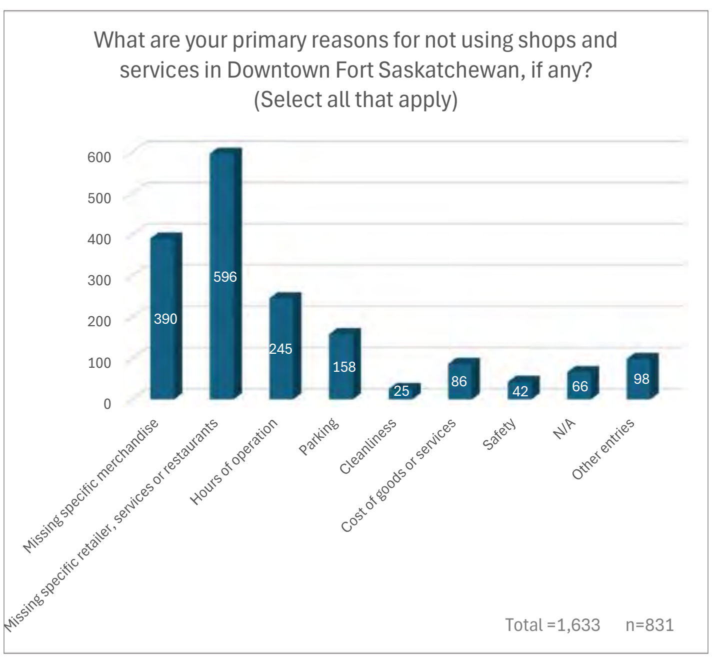
## Survey Results

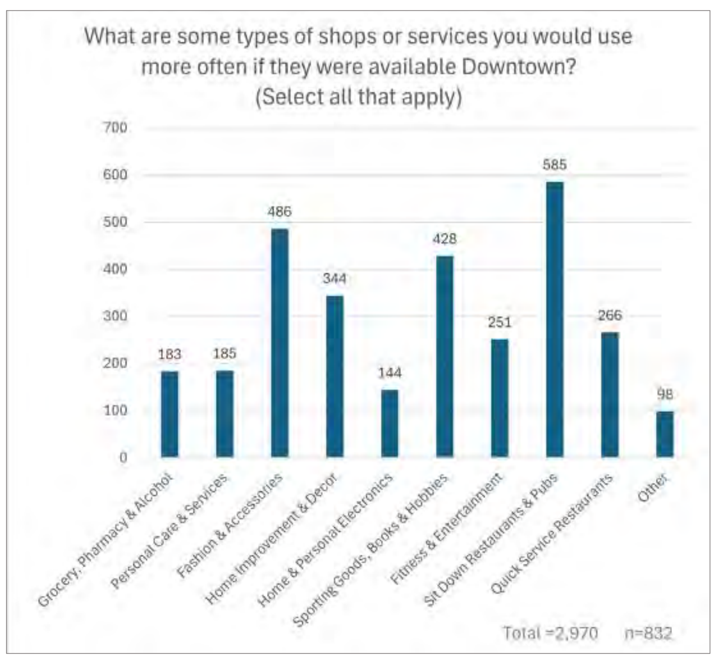


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DOWNTOWN
FORT SASKATCHEWAN